

Sustainable apparel: How brands can transform supply chains

The latest innovations in circular fashion,
 transparency and factory engagement

24th-25th April 2018 | Amsterdam

www.innovation-forum.co.uk/sustainable-apparel

The last year has seen tremendous change within the apparel industry with new sustainable innovations gaining traction. With a greater emphasis on circularity, transparency and supply chain efficiencies coming from fashion and apparel brands, the next 12 months looks set to be another step-change year for the industry.

Through focused and challenging discussions, this two-day conference will address the most pressing issues relevant to the apparel industry. It will equip delegates with the best-practice and know-how relating to the biggest opportunities – and challenges – in transforming apparel supply chains.

The forum will look at major issues such as:

- » **Circular economy in the apparel industry:** How close is circularity to gaining real traction in the industry? Can fashion brands work together successfully to implement circular solutions at scale?
- » **Supply chain transparency:** What's the best way for brands to collate, monitor and use supplier data in an age of transparency and disclosure?
- » **Better factory engagement:** How can brands and factories work together more effectively for improved performance, energy efficiencies and cost-savings?
- » **Role of consumers:** What are consumers truly willing to offer in exchange for more sustainable products?
- » **The Higg Index:** How to use the tools available to measure, benchmark and report the impact of your company's sustainability performance
- » **Digitalisation:** An in-depth look at the sustainability impacts of automation and digitalisation in apparel supply chains

Participating organisations include:

C&A Foundation

INDITEX

H&M FOUNDATION



Ø ZDHC

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canopy

FASHION
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D

worn
again

Filippa K



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Sustainability Academic Director
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INDITEX

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The state of play in sustainable apparel: An in-depth look at how brands are currently performing

2018 has been tipped to be the year sustainability goes mainstream within the apparel industry. Advances in tech innovation have opened up sustainable business models that deliver, not just on sustainability goals, but on the financial bottom line too. These commercial drivers have led to many brands embarking on new models delivering increases in transparency, efficiency and genuine ethical upgrades.

However, fast fashion is big business. An industry now worth \$1.2 trillion has largely benefited from a take-make-dispose economy. How quickly and how enthusiastically are brands actively responding to increasing consumer and activist pressure? Are these new models even viable at the scale that is required for wholesale change? And is the demand really there when it comes to asking customers to play their part?

In this opening panel, we will consider the state of play in the apparel industry as a whole. We'll discuss and debate questions such as:

- Where are brands leading and lagging versus consumer, investor and activist expectations?
- How are leading brands implementing a shift towards more sustainable, circular business models?
- What opportunities are there for apparel brands in a new era of supply chain transparency?

Getting everyone on board: How to engage and communicate effectively with procurement

In order to achieve sustainability targets, it is essential to obtain genuine buy-in from procurement departments. But the targets and objectives of buyers don't always match up with sustainability goals. So, how can brands realign objectives to ensure procurement and sustainability teams are pulling in the same direction?

For years, brands across industries have struggled to reach alignment of these departments. Often it comes down to incorporating sustainability objectives into the KPIs of procurement teams. Linking incentives in pay to sustainability targets is the clearest way to ensure buyers are motivated in sustainability. But these ideas have been around for years. How can brands ensure that sustainability considerations really are factored in across day-to-day decision making? Does it always have to come down to money?

In this session, we'll discuss:

- Proven methods of communicating and engaging effectively across departments
- How to structure incentives for procurement teams when setting and implementing sustainability targets
- What to avoid when talking to buyers about sustainability

- **Focused debate**
- **Senior participants**
- **Candid dialogue**

Engaging factories in sustainability to improve efficiency, reduce supply chain risk and deliver on the bottom line

The apparel industry accounts for 10% of global carbon emissions and remains the second largest industrial polluter, second only to oil. By working with factories to improve energy efficiency, brands can reduce emissions down the supply chain, and save money while doing so. Win-win? Maybe, but this is easier said than done.

Brands working to deliver energy savings have found the process extremely resource intensive. There remains a significant challenge around how to scale efforts without draining resources of sustainability teams. Even in isolation, these programs can create extensive challenges. The who pays vs who benefits conundrum is ever present. There are also a host of issues around how best to monitor and measure the impact and ROI of such programs.

However, the logic remains. Better run factories outperform others environmentally and financially. So how can brands and suppliers work together more effectively to leverage these opportunities? In this session, we'll look into specific case studies where brands have successfully engaged factories down the supply chain. We'll look for the clear, tangible results and ask questions such as:

- How can positive outcomes can be achieved at scale?
- How can efficiencies be measured and monitored?
- Is there evidence that lean, green factories can also deliver on social performance?

Breakouts

Breakout one

Supply chain mapping: How can brands expand traceability beyond the cut-make-trim manufacturing phase?

Traceability has long been identified as one of the most critical areas for the apparel industry. A company needs to know its supply chain to comprehensively assess its risks and engage in tackling them.

Supplier mapping allows brands to know where their products come from and who has made them. This reduces risk, increases control and compliance, whilst safeguarding reputation.

While most brands have managed to map their tier 1 suppliers. Getting further into the supply chain is a challenge.

In this session, we will look at the importance of mapping raw materials and look at solutions that help brands trace and monitor beyond tier 1.

We will ask panellists:

- What are the key challenges in tracing beyond tier 1?
- What useful and innovative technology solutions are already available?
- What are some examples of effective collaborations in this space?

Breakout two

Can digitalisation drive the next wave of sustainability in the apparel industry?

The apparel industry has been slow to embrace digital technologies. But the digitalisation and automation of supply chains appears all but inevitable. Promises of shortened lead times, increased manufacturing flexibility, reduced suppliers, streamlined communications and a host of other benefits have procurement professionals convinced that the future is digital. But what are the sustainability implications of this emerging trend?

For fast fashion, digitalisation has promised greater customisation potential, reduced waste, increased transparency and significant overall resource savings. But despite a handful of pilots and PR stunts, brands still seem slow in the uptake.

In addition to the environmental effects, increasingly automated supply chains have a significant social impact as well. Do brands have a social obligation to the factories and workers in their supply chains?

This session will assess the sustainability impacts brought by digitalisation. We'll debate how far digitalisation can drive sustainable outcomes, and discuss the potential for negative consequences as well.

Breakout three

Viscose: A closer look at the emerging deforestation threat

Until recently, the relationship between the fashion industry and deforestation was largely undocumented. Viscose, also known as rayon, is made from cellulose or wood pulp. Although viscose is made from generally quick growing, regenerative trees, the sustainability of the wood sources varies greatly.

Canopy's 'Hot Button Issue' assessment rated companies on this issue. As a result, nine of the top ten viscose producers, including Lenzing and Aditya Birla, have now publicly committed to end all sourcing from endangered forests. Brands such as Inditex, Stella McCartney and Eileen Fisher have also been moving to more sustainable viscose sources.

This breakout session will look at viscose as an emerging deforestation threat and answers questions such as:

- Who are the industry leaders when it comes to sourcing viscose?
- What is the next step beyond avoiding controversial sources?



Breakouts

Breakout one

Transparent supply chains: What information should brands disclose, and how should they go about it?

Consumers are increasingly demanding more transparency on where apparel products come from. Companies that aren't transparent will lose trust. This appears to be something brands are taking seriously with 42 out of 100 large fashion brands disclosing supplier information in 2017.

With this influx of supply chain data, the question facing many brands is what to do with it. While organisations have long focused on the "labour behind the label", transparency around the environmental footprint of brands is also gaining momentum. New mapping tools such as the IPE Green Supply Chain can openly link multinational corporations to their suppliers' environmental performance.

With so many brands sharing supply chain data, this session will look at whether sector-wide initiatives can be scaled. We will also ask what brands can and should do with the information gathered to improve supply chain practices and be more transparent with stakeholders.

Breakout two

Roadmap to zero: Eliminating hazardous and toxic chemicals from supply chains with the ZDHC Programme

Hazardous and toxic chemicals not only cause damage to the environment, but affect both textile workers and the wearers of clothes. According to the World Bank, 20% of water pollution globally is caused by textile processing, making it the second biggest polluter of freshwater globally, following agriculture.

The Zero Discharge of Hazardous Chemicals Programme includes a collaboration of brands, value chain affiliates and associates, working to implement safer chemical management systems. It started as a response to the Greenpeace Detox campaign, which prompted brands to commit to eliminating hazardous chemicals by 2020. Only two years away, this session will look at the progress of brands to date and what needs to be done to ensure these goals are met on time.

Breakout three

The little big problem: Microfibres

Microfibres, minute plastic particles that are shed every time polyester (and other synthetic materials) are washed, have been a major contributor to the growing problem of ocean plastic pollution.

According to the Ellen MacArthur Foundation, half a million tonnes of plastic microfibres are released from washed clothes every year. The particles can easily pass through sewage and wastewater treatment plants, do not biodegrade, and are then eaten by small creatures, such as plankton.

At present, alternative non-plastic synthetic fibres, offering the same versatility and performance of materials like polyester, are limited. Furthermore, research into how much harm these fibres cause in aquatic environments and its effect for human health is still in its infancy.

This session will look at the present research into microfibre pollution, and the options currently at companies' disposal to try and combat the issue.

Standards consolidation: What needs to happen to drive efficiencies, reduce audit fatigue and improve performance

The apparel industry is made up of a large number of complex, widespread and intertwined company supply chains. Each of these supply chains is measured against an overwhelming number of standards, audits and assessment frameworks. This is leading to a growing fatigue across the industry. Factories are struggling to meet the multiple criteria demanded by brands and the industry is spending vast amounts of resources, often unnecessarily.

In an effort to reduce this audit fatigue and mere duplication, one solution could be effective standards consolidation. In this session, we'll ask questions such as:

- Is standards consolidation a realistic solution to reducing audit fatigue?
- How can the audit process be improved to deliver better information whilst draining fewer resources?
- How can industry collaboration work to reduce the growing burden on factory resources?

How close is circularity to gaining to real traction in the fashion industry?

According to a 2017 McKinsey report, implementing a circular economy could save up to £500bn annually. Circularity is inching its way into the fashion industry, but how close is it to mainstream application? Innovation across the sector is opening up new business opportunities. Companies such as H&M, adidas and Kering are leading the way through new production methods, and in January 2018 numerous additional fashion brands committed to boosting circular apparel efforts by 2020.

However, there is still a long way to go. While there is interest in moving towards a more circular model of textile production, the prominent fast fashion business model renders it difficult to scale efforts. At the same time, current recycling rates for textiles still remain very low. A systemic shift in business models is a big undertaking, but being ahead of the game is an opportunity for business to profit whilst improving operations.

This session will hear from some leading brands who have already begun developing circular supply chains, and answer questions such as:

- Will the current momentum around circularity continue in the coming years?
- Is a circular business model realistic at the scale required for large apparel brands?
- How far are current projects from going mainstream?
- How can the industry effectively work together to move away from a take-make-dispose model?

How can brands ensure that circularity is embedded from the design stage?

At present, the textile system operates in a linear way. Most pieces of clothing are only worn a couple of times and then mostly end up in landfill. For brands, a key starting point is to get design teams to engage with the drive to lower impacts and to ensure sustainability is built in at the R&D stage.

In an effort to fully close the loop, brands need to ensure that mechanisms for circularity are put in place from the design stage. But, what new and sustainable fibres are there at companies' disposal? How can brands use recycled content in their products?

Innovations in the industry are already full steam ahead. The H&M Foundation and the Hong Kong Research Institute of Textile and Apparel are working together to recycle blended fabrics; C&A released the first line of T-shirts certified by the Cradle to Cradle standard; and companies such as Lenzing and WornAgain are transforming textile scraps into new virgin materials.

The session will look at the existing and emerging innovations the fashion industry has to offer to ensure that circularity is embedded from the design stage.

- How can sustainability teams and designers work together effectively to find circular solutions?
- What is the first step to incorporating circularity into R&D?
- What systems and technologies exist for companies to improve the recyclability of materials?



What's different about Innovation Forum?

IF is NOT:

- ✗ **A PR platform:** enthusiastic speakers are NOT given free rein to fill a session presenting their companies, allowing no time to actually get to the crux of the issues.
- ✗ **A talking shop:** this is NOT an opportunity for a group of people in a room to simply agree with everything said, regardless of outcomes.
- ✗ **All promise, no delivery:** we will NOT promise what we can't deliver. The issues covered are complex. They won't be solved at a two-day conference. But we will help deliver progress through in-depth, constructive and practical advice around specific issues.

IF is:

- ✓ **Candid:** Entirely off-the-record (Chatham House rules) discussion that enables open and honest disclosure from speakers and genuine participation from the audience.
- ✓ **Practical:** A clear focus on the practical and actionable guidance that can drive change throughout industries and supply chains.
- ✓ **Focused:** We provide enough time, resources and expertise to the issues that really matter. We don't skate the surface, but get to the crux of the issues to provide in-depth, constructive discussion.

Case studies: New innovative fibres for the circular economy

In this session we will take an in-depth look at two innovative methods in which brands and manufacturers have worked together to develop circular materials.

Part 1: How to recycle blend textiles into new fibres

Part 2: TBC

Erik Bang, innovation lead, **H&M Foundation**

Edwin Keh, CEO, **Hong Kong Research Institute of Textiles and Apparel**

The Higg Index: Measuring and reporting the impact of your company's sustainability performance

Knowing where you stand within the market is becoming increasingly important as more and more apparel companies are advocating for sustainability and social responsibility. More accurately measuring and reporting impact is a way for brands to better understand their own operations, do their due diligence, and see what areas they should be focusing on.

The Higg Index provides brands, retailers, and other supply chain actors with tools to accurately measure and score a company or product's sustainability performance. Manufacturers, for example, are using the Higg tools to measure the performance of their facilities. This provides companies with an overview of the impact at an individual factory level rather than looking at the parent company as a whole.

This session will look at the growing importance of the Higg Index within the apparel industry and provide brands with the tools to effectively see where they stand amongst their competitors.

In this session, we'll discuss:

- What are the effective ways of reporting on your impact?
- How can brands build consistency, credibility and comparability through these scores?

The elephant in the room: What are consumers truly willing to offer in exchange for more sustainable products?

Millennials are often hailed for their support of the green economy. According to a 2015 Nielsen report almost 75% of 15-20 year olds are willing to pay more for sustainable products and services. However, to date, it has been rather rare to see this trend in action when it comes to customers putting their hands in their pockets. Even millennials have been willing to offer relatively little in return for sustainability.

But is this trend changing? Are companies slowly seeing that, in large, customers are truly willing to offer something in return for a sustainable business model? Or does the "price of sustainability" have to be simply built in to every product because that's what the customer expects?

In 2018, H&M released a new sustainable activewear collection. This gained widespread media coverage and was well received amongst consumers. However, since items are at the same price point as the company's usual activewear collection, it is still hard to tell what really pushed that demand.

This session will address the ongoing debate on how much more consumers are willing to offer for more sustainable products. Is there finally enough demand in the marketplace to support the drive for more sustainable apparel production? Do customers have the information they need to make this choice?

Questions?

If you would like to discuss being involved as a delegate, sponsor, or media partner, please email:

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Register here:

www.innovation-forum.co.uk/sustainable-apparel-register

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Why attend?

- ✓ Hear from industry leaders – what has worked for them, and what to avoid
- ✓ Multi-stakeholder attendance – network with diverse figures from across the fashion and apparel industry
- ✓ Understand the latest innovation set to transform the apparel industry in the next five years