While the sustainable and second-hand fashion markets are gaining ground, their impact is hard to measure and they remain part of a sector-based growth approach, one that prevents the textile and apparel industry as a whole from putting a halt to the regular increase of its resource waste and negative externalities,” stated the report.

“Public authorities have undertaken efforts to tackle certain issues, such as improving the working conditions of textile labourers, especially in Asia, and the management of textile waste. But climate change considerations are only weakly embedded into these regulatory attempts and, for the time being, climate change is the focus of relatively isolated initiatives and statements of intent by European groups.”

The report details the evolution of global textile fibre production, which FashionNetwork.com has analysed in a previous article. The output of polyester for example has doubled in 15 years according to Climate Chance, but the supply chain’s profile is hard to decipher. In 2018, the textile and apparel industry was responsible for 2.1 billion
tons of greenhouse gas (GHG) emissions, equivalent to a 23% increase in three years and to approximately 4% of global GHG emissions.

Manufacturing accounted for 71% of these emissions, the main share (38%) caused by materials production, followed by spinning (8%), wet-process materials transformation (15%), garment manufacturing (6%) and cutting (4%). Transportation and retail sales each generated 3% of all industry emissions. Product usage was responsible for another 20%, plus another 3% for end-of-life emissions.

The products that seem to generate the most waste are woollen sweaters, breathable waterproof anoraks and mixed-material overcoats, ahead of cotton shirts, cotton dresses, acrylic sweaters and polyester dresses.

In addition to the industry’s GHG emissions, the report pointed the finger at its water usage. With 84.5 billion of cubic metres per year, cotton reportedly accounts for 93% of the textile industry’s water usage. Besides, although cotton crops are grown over only 2.4% of the world’s agricultural lands, they account for 22.5% of all pesticides used. The remaining 7% of the textile industry’s water usage is chiefly due to fibre production and dyeing, which altogether use 43 million tons per year of chemicals. Added to this, 500,000 tons of micro-plastics are dumped every year in the oceans as a result of apparel washing by consumers.
Woodland-wise, the industry accounts for 1% of global deforestation, and is responsible for the cutting of 150 million trees every year. This on top of the 2.4% share of the world’s agricultural lands devoted to cotton crops in 2020, and the 278 hectares of land needed to produce one single ton of wool. As for the end-of-life disposal of fashion products, less than 1% of clothes produced are said to be currently used to manufacture new ones, while 12% of them are downcycled into less valuable items. Of the materials currently used to produce garments globally, 87% are destroyed.

How does the apparel industry engage with these issues?

Climate Chance has identified a variety of initiatives undertaken on an individual basis by industry players, initiatives that, by their nature, simply fail to promote industry-wide change. While 50% of apparel companies currently monitor their waste, only 10% of them have set themselves waste reduction targets.

On the other hand, a number of labels are turning towards raw materials that are lighter on water and fertilizer usage, like linen and hemp. The carbon footprint of organic cotton is 46% lower than that of traditional cotton, and its production has doubled in six years, but it still only accounts for 1% of all the cotton produced globally. Labels tend to favour the use of preferred cotton, which is produced in an ethical and environmentally friendly way, is cheaper than organic cotton and good for the labels’ image, and had a 25% market share in 2019.

With regards to dyeing and treatments, several new techniques are emerging. “ColorDry has enabled Nike to economise 20 million litres of water (WWF, 2017); Swiss company Archroma has developed a sulphur-based denim dye which saves 84% of water and 25% of CO2 emissions compared to conventional dyes (WWF, 2017),” noted the report, adding that “others use natural products to dye fabrics: for example, US restaurant chain Chipotle Mexican Grill has launched a collection of clothes that are coloured with dyes made from the avocado pits discarded by its branches.”
Transportation-wise, the report cited French apparel brand 1083, which pledges to sell to its customers products made within a 1,083 km radius, and also a study by McKinsey published in March, which found that by re-localising certain material transformation phases, it would be possible to cut transportation emissions by 3%. If notions of CSR are taken into account, the creative aspect of fashion could also change.

The fashion industry’s output has doubled since 2000, but the length of time items are worn for is 15% shorter. Hence the emergence of labels and clothes designed to be atemporal and to weather changes in fashion trends, while clothes repair facilities are sprouting at labels like Nudie Jeans, Vaude and others. Circularity has been embraced by many labels, from H&M’s clothes collection drive to French label Corail’s sneakers, made of recycled plastic waste from the seas, to Freitag’s bio-degradable clothes. Second-hand fashion is booming in the meantime, and in 10 years the market could be twice the size of fast-fashion, according to ThredUp.

An approach that is too productivist and consumerist?

“A number of brands have developed collections labelled as ‘sustainable’, ‘ethical’ and ‘responsible’, and launched second-hand initiatives, often trumpeted with blaring rhetoric,” noted the report, mentioning the case of Walmart. “However, the statements and pledges made by labels aren’t always consistent with the reality of their business practices,” said Climate Chance, adding that “a recent report by the Retviews agency showed that H&M’s Conscious collection only accounts for 9% of the brand’s items, and Zara’s Join Life for 14%. This while both [H&M and Zara] are signatories of the Fashion Industry Charter for Climate Action issued in 2018 after the COP24 summit, and of the Fashion Pact”.

Sustainable clothing reportedly accounts for only 1% of the products on the market. A figure that seems counter-intuitive, given that the number of clothes labelled as ‘sustainable’ is said to have multiplied by five between 2017 and 2019. The Climate Chance report also sounded a warning bell about the real significance of some certifications, for example the Global Organic Textile Standard, which don’t specifically delve into dyeing methods or transportation emissions.

“A series of tools have been created to try and assess (and potentially certify) the entire manufacturing chain,” said Climate Chance. “Certification labels like Sloweare attempt to cover multiple issues with their standards. Traceability apps like ClearFashion allow consumers to have better access to supply chain information. Fashion e-
Traceability apps like ClearFashion allow consumers to have better access to supply chain information. Fashion e-tailer Zalando is going to select its suppliers by applying the Higg Brand & Retail Module developed by the Sustainable Apparel Coalition, a tool that tracks the performance of labels in terms of CO2 emissions, human rights compliance and environmental pollution impact via a series of indicators,” stated the report.

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