FASHION SUSTAINABILITY REPORT 2021

focus on change &
Southeast Asia

FASHION REVOLUTION Singapore

ACKNOWLEDGEMENTS

This report would not have been possible without the team at Oxford Development Consultancy (ODC). I would like to thank Janne Parviainen, who kept our progress on track at our weekly meetings and is by far the largest contributor to this very report – right down to the appealing visuals. I must also thank Awa Shuyue Xue for developing and consolidating the market survey, thereby allowing our report to include both quantitative and qualitative insights. To Emil Beddari, thank you for helping to convert the data from the market survey into insights. Thanks should also go to Manoj Kumar Thiyagarajan, who reached out to Fashion Revolution Singapore and without whom this project may have never started. To the rest of the ODC team, thank you for the good work you do.

I would also like to extend my thanks to Niamh Tuft and Xingyun Shen for offering your time and invaluable suggestions in the drafting process.

Finally, I'd like to acknowledge the help from Tere Arigo of Fashion Revolution Philippines and Melissa Tan of Fashion Revolution Malaysia for sharing the market survey with their communities, and the effort of all respondents to our market survey.

- Chu Wong, Country Coordinator (Fashion Revolution Singapore)

EDITORIAL TEAMS:

OXFORD DEVELOPMENT CONSULTANCY

Janne Parviainen
Awa Shuyue Xue
Emil Beddari
Mukesh Ramanathan
Edward Birch
Carolina Rota
Candice Runqiu Ji

FASHION REVOLUTION

Chu Wong
Niamh Tuft
Xingyun Shen

EXECUTIVE SUMMARY

Fashion is among the most environmentally and socially damaging industries in the world. From poorly regulated manufacturing and dangerous working conditions, pollution and over-extraction of water to massive amounts of textile waste ending up in landfills, the challenges to sustainability are mounting at an escalating pace. When combined with the rate of climate change and biodiversity loss – not to mention the implications of these to human health – one cannot afford to overlook these concerns.

Yet, sustainable fashion movements, production and design are gaining traction across the world. Recycling discarded materials and garments, upcycling clothing, utilizing renewable resources, clothes-swapping, second-hand shopping and garment rentals are becoming increasingly common among consumers. NGOs and civil-society organizations have also focused on leveraging policymakers, and numerous governments themselves have recognized the need to reorganize supply chains in order to achieve transparency and accountability required for greening production. As a result of this momentum, the (currently niche) sustainable fashion market is growing at a faster rate than rest of the industry.

However, a lot remains to be done. Current initiatives, corporate social responsibility and policies targeting fashion often fall short due to higher emphasis on sustaining profit, or greenwashing by brands that seeks to merely appear green while misleading conscious consumers. Furthermore, the ends of opaque and multilayered supply chains – particularly in Southeast Asia (SEA) – often have catastrophic results to the workers' safety and well-being due to lack of accountability, transparency and measures designed for their protection. These issues have yet again re-emerged following the COVID-19 pandemic. Due to the lack of permanent contracts, safety nets and sick leave, millions have been casted into economic precarity following the temporary collapse of the fashion industry.

Southeast Asia has a high potential to lead change towards a greener, socially just future of fashion. By looking into the efforts of governments, NGOs, designers, brands and customers themselves, it will be made evident that many have sought to grasp the on-going global sustainability momentum, therefore demonstrating that the concerns regarding the environmental and ethical impacts of fashion in SEA have been well internalized. Moreover, given the diversity and cultural richness of the region, the talents found in small and medium-scale enterprises (SMEs), operated by traditional artists, craftspeople and weavers, are present in all of the assessed countries. Whilst currently underutilized, these small-scale, locally driven businesses have an immense economic potential, and can steer the future of the garment industry towards a greener and more sustainable pathway.

Despite the tendency to describe the current interest regarding sustainable fashion in SEA as 'underdeveloped' or 'in its infancy', this report establishes that the opposite is the case. By examining a selection of qualitative and quantitative evidence, it will become clear that waves of change – as witnessed globally – can also be found in the assessed countries: in fact, Southeast Asia is undergoing a fashion revolution.

1. INTRODUCTION

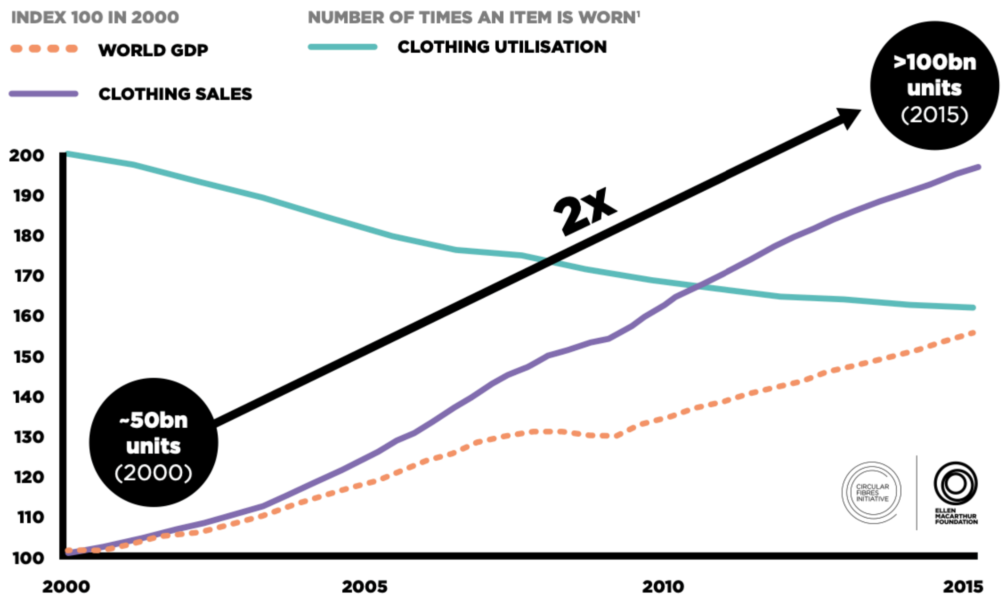


Figure 1. Graphic from Ellen MacArthur Foundation, clothing sales growth and the decline in clothing utilization[1]

Over the recent years, the negative environmental and social impacts resulting from the fashion industry have rapidly increased. Indeed, the industry has been growing at an average rate of 5.5% annually[2], today nearing a value of US $2.6 trillion, having produced an approximate number of 130.6 billion items of clothing and footwear in 2019 alone[3]. Largely driven by the 'fast fashion' phenomenon (referring to the quicker turnaround of new collections and lower prices), the growing middle-classes have been doubling the consumption of clothing over the past 15 years – yet the lifetime of clothing used has been in steady decline (see figure 1).

Due to the unsustainable practices and poorly regulated supply chains, the negative impacts of such trajectory are dire. For instance, the fashion industry today accounts for between 20-35% of microplastic flows ending in the ocean, and in 2015, outweighed the carbon footprint of international flights and maritime shipping combined, exceeding 1.2 billion tons of CO_2[4]. Overall, the industry has been estimated to constitute 10% of all carbon emissions emitted globally[5].

---

[1] Euromonitor International Apparel & Footwear (volume sales trends 2005-2015); World Bank, *World Development Indicators*, cited in Ellen MacArthur Foundation, *A New Textiles Economy: Redesigning Fashion's Future,* Cowes, 2017, p. 18
[2] The Business of Fashion and McKinsey & Company, *The State of Fashion 2017,* New York, 2016, p.11
[3] Fashion Revolution, *Fashion Revolution White Paper,* London, 2020, p.40
[4] ibid.
[5] McFall-Johnsen, M., 'These Facts Show How Unsustainable the Fashion Industry Is', *World Economic Forum: Environment and Natural Resource Security,* 31 January 2020,

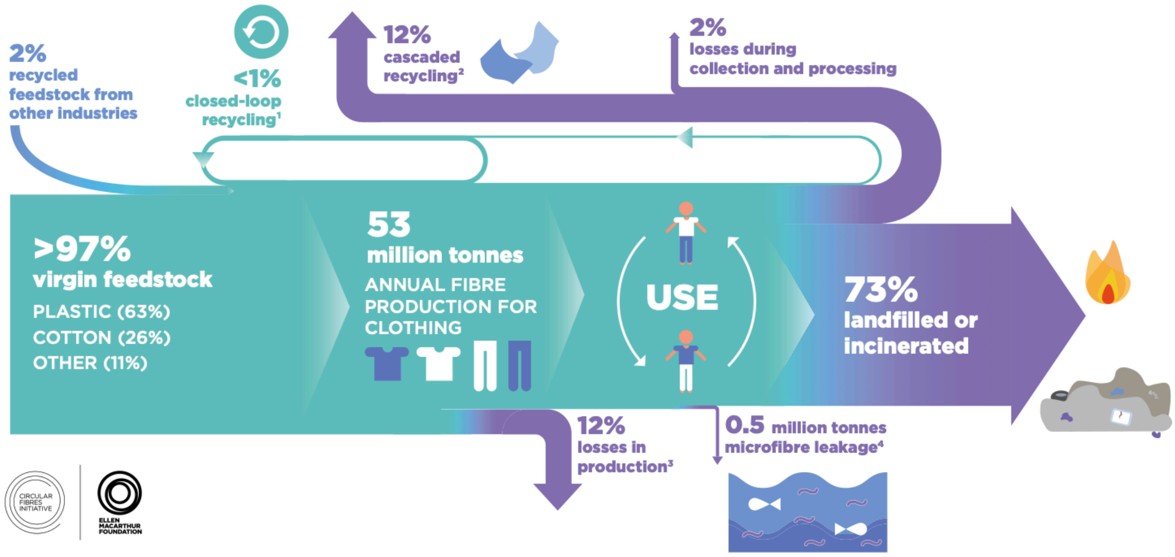


Figure 2. Graphic from Ellen MacArthur Foundation, global clothing material flows in 2015[6]

Furthermore, given the industry's reliance on fast fashion, over 92 million tons of waste is created per year, not to mention the 79 trillion liters of water consumed annually to sustain the production of cotton and other textiles[7,8]. Most of the raw materials utilized are sourced from virgin materials, very little are recycled, and most end-of-life clothing still ends up incinerated (figure 2). Furthermore, chemicals used in textile manufacturing and processing are often harmful to the environment, threaten biodiversity, and contribute to threats to human health. Due to the fact that thousands of different synthetic chemicals are used by the industry in all stages of production, their impact to freshwater systems, soil stability and biodiversity can be detrimental. For example, the production of 1 kilogram of cotton garments can use up to 3 kilograms of chemicals, and approximately 200,000 tons of dyes are lost to run-offs due to inefficiencies in the production processes[9]. Once in aquatic environments, dyes may stop the reoxygenation capacity of the receiving water, block sunlight, and thus upset biological activities and photosynthesis of plants and algae, leading to long-term effects and potentially reduced biodiversity[10].

---

[6] Ellen MacArthur Foundation, p. 20

[7] Niinimäki, et al., 'The Environmental Price of Fast Fashion', *Nature Reviews Earth and Environment,* vol. 1, 2020, p. 189-190 (pp. 189-200).

[8] McFall-Johnsen, M., 'These Facts Show How Unsustainable the Fashion Industry Is', *World Economic Forum: Environment and Natural Resource Security,* 31 January 2020, https://www.weforum.org/agenda/2020/01/fashion-industry-carbon-unsustainable-environment-pollution/ (accessed 15 December 2020).

[9] Ellen MacArthur Foundation, p. 110

[10] Gita, S., Hussan, A. and Choudhury, T. G. 'Impact of Textile Dyes Waste on Aquatic Environments and its Treatment' *Environment and Ecology,* vol. 35, no. 3c, 2017, p. 2349 (pp. 2349-2353).

One cannot overlook the social impacts of the industry either. Whilst transparency, regulations, auditing, certification systems and laws against modern slavery are gaining traction, human rights abuses continue to persist. Forced and child labor, excessively long working hours, low pay, repression of trade unions, lack of job security, gender/race-based discrimination, and dangerous working conditions still characterize garment manufacturing[11]. The Global Slavery Index highlighted that labor continues to be extracted through coercion, force or threats[12], and that wages remain notoriously low in the fashion supply chain globally[13]. Furthermore, given that millions of garment workers globally are women, the risk of gender-based violence and sexual harassment remain high, and women continue to be lowly paid. It has been estimated that 2 in 5 women workers in garment factories do not receive equal salaries to that of men[14].

Finally, the impacts of COVID-19 must be addressed. Supply chains have been thrown into chaos, whilst rates of consumption have been in decline due to loss of purchasing power[15]. These cascading collapses have had detrimental outcomes to workers, especially in South and Southeast Asia. In India, 20% of 1,500 clothing manufacturers surveyed were considering closing permanently, and in Bangladesh, US $3.17 billion worth in orders have been cancelled, a loss that affected around 2.27 million workers[16]. The disaster has indeed revealed a persisting, glaring problem in the fashion supply chains; social security of workers is severely lacking, and the propagation of the ripple-impacts of Covid-19 are forcing people – especially those involved in short-term labor and subcontracting – into economic vulnerability at the brink of constant precarity. Furthermore, many companies have cut salaries or fully laid off their employees, affecting the economic security of millions of workers across the world. However, the interconnectedness and vulnerabilities of supply chains are complex problems to address. For instance, approximately 70% of woven fabrics used in Bangladesh's garment industry are sourced from China, and when the lockdowns began in the latter, production in Bangladesh suffered severe impacts due to these effects traversing down the chains of production[17]. Therefore, one must also understand the connectedness of the global economic system in order to assess the sustainability of the wider industry and the structure it is embedded in.

---

[11] Fashion Revolution, p. 29

[12] Walk Free Foundation, *Global Slavery Index 2018,* Perth, 2018, p. 26

[13] Fashion Revolution, p. 30

[14] CARE International, *Made by Women: Impact Report 2019,* Geneva, 2019, p. 1-3

[15] Business of Fashion and McKinsey & Company, *The State of Fashion 2021,* New York, 2020, p. 8

[16] Majumdar, A., Shaw, M. and Sinha, K. 'Covid-19 Debunks the Myth of Socially Sustainable Supply Chain: A Case of the Clothing Industry in South Asian Countries, *Sustainable Production and Consumption,* vol. 24, 2020, p. 151 (pp. 150-155).

[17] McMaster, M. et al., 'Risk Management: Rethinking Fashion Supply Chain Management for Multinational Corporations in Light of the COVID-19 Outbreak', *Journal of Risk and Financial Management,* vol. 13, no. 173, 2020, p. 8 (pp. 1-16).

Given the aforementioned evidence, there is an urgent need to improve the transparency of the industry, to highlight accountability of companies to account how workers are treated, to improve factory conditions, improve equity and safety for women, combat low wages, and address the environmental impacts of production. Yet, greening the industry from its current, destructive path is still well beyond reach. In fact, if we are to carry on with the current pathway, by 2050 the fashion industry could end up using more than 26% of the carbon budget associated with a below-2° Celsius global warming trajectory, consume 300 million tons of nonrenewable resources annually by 2050, and add 22 million tons of microfibers into the ocean between 2015-2050[18].

Therefore, the issue of sustainability remains a key concern for governments, manufacturers, retailers and consumers, and has been increasingly focused on as these issues become ever more pressing. The following section will highlight some sustainability trends and movements which are currently driving change, in efforts to illustrate that it is not too late to push back against the locomotion of growth-driven fast fashion.

THE TIME FOR CHANGE HAS COME. WE CANNOT AFFORD FAST FASHION.

[18] Ellen MacArthur Foundation, p. 21

2. GLOBAL TRENDS

By constructing a bricolage of highlights sourced from across the world (alongside growth-driven market trends) this section seeks to build an understanding of the sustainable fashion momentum now gaining traction. Indeed, the industry is changing; sustainability, climate concerns and awareness of social issues as a part of manufacturing are no longer fringe issues among retailers, consumers or the wider society. By 2019, the global ethical fashion market had reached US$ 6.35 billion in value, growing at a rate of 8.7% since 2015[19]. This improvement has been driven by two aspects: consumer advocacy and raised awareness, alongside retail and retailer/producer interest targeting these consumer groups.

Most noticeably, consumer behavior has been starting to change. In the recent years, the world has witnessed an increase in awareness following the mainstreaming of the Sustainable Development Goals and the Paris Agreement. Public figures, social movements and organizations from Greta Thunberg to Extinction Rebellion, Fashion Revolution, the Global Fashion Agenda and plethora of others (including non-governmental and governmental bodies) have been spearheading and sustaining the momentum in public discourse, which can now be seen in consumer interest. These trends are prevalent globally; by examining the chart revealing Google search trends regarding sustainable fashion, a stark increase can be witnessed to date (figure 3). On Twitter, the hashtag #SustainableFashion has been growing rapidly, a conversation that has been largely driven by women (71%) and 18-24-year-olds (52%), indicating that Generation Z and the Millennials are increasingly concerned about environmental and social causes[20]. On Instagram, #Sustainable has grown five-fold in the last 3 years, and consumer attitudes have become increasingly eco-conscious, DIY-oriented and focused on wellbeing as opposed to high-end glamour (partly due to the on-going pandemic)[21]. These trends have been translated to shopping behavior.

[19] Business Research Company, 'Sustainable Fashion Market Analysis Shows the Market Progress in Attempt to Decrease Pollution in the Global Ethical Fashion Market 2020, *Global Newswire,* 28 October 2020, https://www.globenewswire.com/news-release/2020/10/28/2116073/0/en/Sustainable-Fashion-Market-Analysis-Shows-The-Market-Progress-In-Attempt-To-Decrease-Pollution-In-The-Global-Ethicalfashion-Market-2020.html, (accessed 10 December 2020).

[20] Brock-Nielsen, S., 'Retailers and the Rising Trend of Sustainability: What Marketers Need to Know, *Sprout Social: Social Media Trends,* 21 April 2020, https://sproutsocial.com/insights/retail-social-sustainability-trend/, (accessed 17 December 2020)

[21] Mollard, M., 'Consumer Attitudes: COVID-19 x Fashion', *Heuritech,* 6 May 2020, https://www.heuritech.com/blog/articles/consumer-attitudes-covid-fashion/, (accessed 17 December 2020).

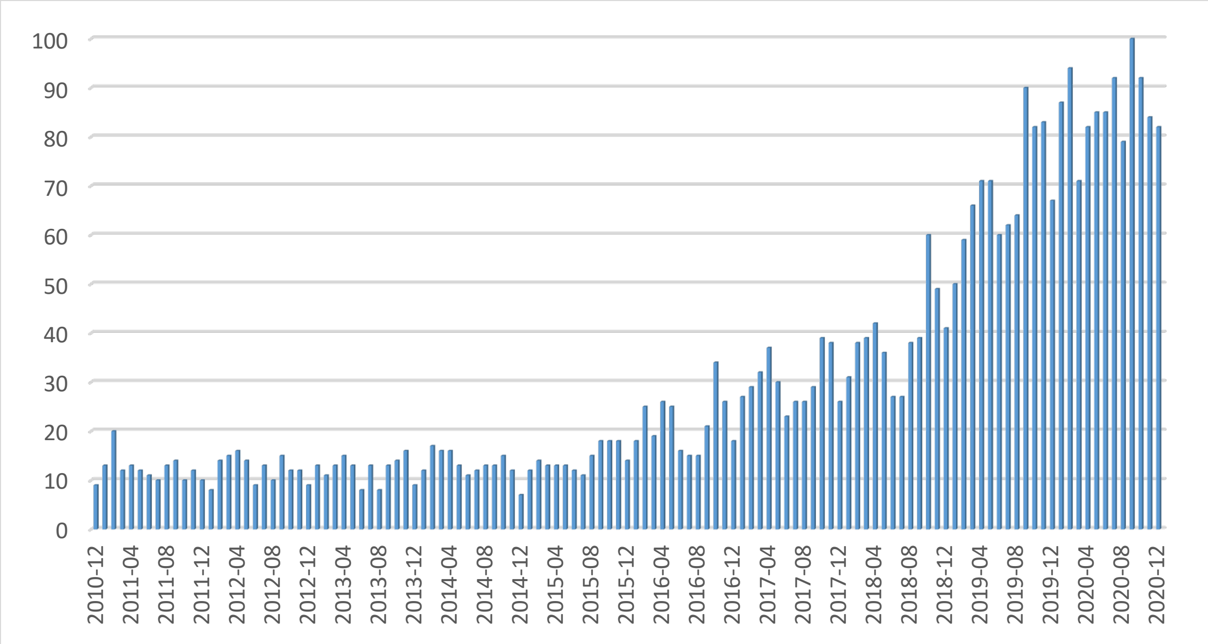


Figure 3. Sustainable fashion search interest over time on Google Trends (2010-2020)[22]

It has been estimated that 73% of global consumers are willing to change their consumption habits to reduce their personal impacts on the environment[23]. Fashion retailers have reported this pattern as well; a study conducted by Lyst indicated a rising interest regarding vegan leather (69% increase), organic cotton (23%), especially with regards to sneakers and denim which remain the most wanted product categories in sustainable fashion searches[24]. A recent survey by the Boston Consulting Group suggested that more than half of consumers in their US-focused survey choose more socially and environmentally sustainable brands over non-sustainable alternatives[25]. Similarly, Capgemini Research Institute illustrated that 79% of French consumers partaking in their survey were changing their purchasing preferences depending on sustainability, 77% were concerned about the fair treatment of workers and 72% were concerned about their personal environmental footprint[26]. In the UK, 65% of consumers agree that the government should be doing more to reduce the negative impacts of the fashion industry on the environment[27].

[22] Google, *Google Trends: 'Sustainable Fashion',* 2021, https://trends.google.fi/trends/explore?q=sustainable%20fashion, (accessed 20 November 2020)

[23] Nielsen, 'A Natural Rise in Sustainability Around the World', *Nielsen Insights,* 10 October 2019, https://www.nielsen.com/us/en/insights/article/2019/a-natural-rise-in-sustainability-around-the-world/, (accessed 15 December 2020).

[24] Lyst and Good On You, *The 2020 Conscious Fashion Report,* Lyst, 2020, https://www.lyst.com/data/2020-conscious-fashion-report/, (accessed 15 December 2020)

[25] Boston Consulting Group, *The Pulse of the Fashion Industry: 2019 Update,* 2019, p. 2

[26] Capgemini Research Institute, *Consumer Products and Retail: How Sustainability is Fundamentally Changing Consumer Preferences,* Paris, 2020, p. 2

[27] Hubbub in Smithers, R., 'MPs Urge Government to Fix 'Throwaway' Fast-fashion Trend', *The Guardian,* 15 September 2020, https://www.theguardian.com/fashion/2020/sep/15/mps-urge-government-fix-throwaway-fast-fashion-trend-sustainable, (accessed 15 December 2020)

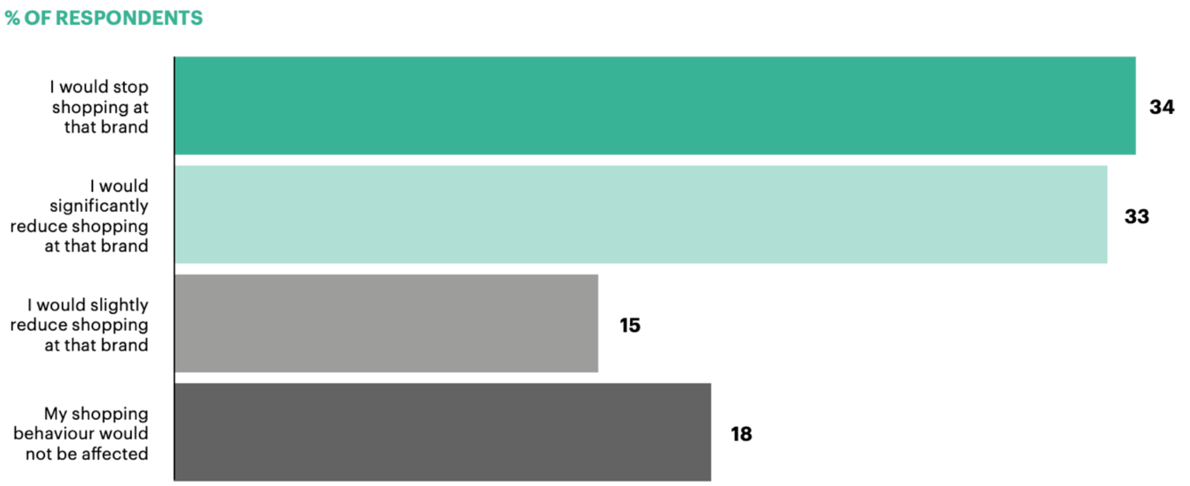


Figure 4. Graphic from the consumer survey conducted by McKinsey Company in Germany, UK and Spain in 2020[28]

Generally, consumer interests extend well beyond environmental impacts to social issues as well, and many believe that retailers have a societal responsibility with regards to issues such as diversity and inclusion[29]. According to Kantar Monitor, 54% of consumers believe that brands have a role to play in social conversations regarding issues such as #MeToo movement and race relations[30]. Furthermore, given the rise in longer-term trends in citizen activism witnessed not only in the United States during 2020, but across the globe as well, Generation Z (accounting for more than 40% of consumers in 2020) is likely to continue leading change as the most politically active age group on social media platforms[31]. The impacts can already be witnessed; a survey by McKinsey illustrated that two-thirds of consumers would stop, or significantly reduce shopping at a brand if it was found that they do not treat their employees fairly (figure 4).

Consumer behaviors are changing due to the pandemic as well. In the context of the US, a sharp decline in consumer incomes and the inability to shop have contributed to a rapid decline in clothes consumption[32]. Due to the conditions, consumers are likely to shop less, be choosier when they do so, and shop online; all these factors can contribute to more sustainability-conscious shopping. In Germany, for example, 57% of consumers partaking in McKinsey Company's survey had made significant changes to their lifestyles to reduce their personal environmental impacts, and 67% considered sustainable materials as a key-consideration when purchasing products following the

[28] Business of Fashion and McKinsey & Company, *The State of Fashion 2021,* New York, 2020, p. 49
[29] Business of Fashion and McKinsey & Company, *The State of Fashion 2020,* New York, 2019, p. 11
[30] Kantar Monitor in Business of Fashion and McKinsey & Company, *The State of Fashion 2021,* New York, 2020, p. 46
[31] Business of Fashion and McKinsey & Company, *The State of Fashion 2021,* New York, 2020, p. 46
[32] Bianchi, F. et al., 'Fashion's Big Reset', *Boston Consulting Group,* 1 June 2020, https://www.bcg.com/publications/2020/fashion-industry-reset-covid, (accessed 17 December 2020)

pandemic[33]. Reusing, upcycling, and mending are also gaining traction during lockdown, indicating a reduced consumer interest in partaking in high-street fast fashion[34]. Such trends in consumer interest have been documented in India[35], France[36], the UK[37], just to name a few. On the side of retailers, the pandemic and wider change in the patterns of consumer interests are contributing to global change. For example, COVID-19-related recovery funds for businesses are likely to be earmarked to require climate action. Therefore, businesses in many countries need to take sustainability into account if they are applying for them; for example, the European Union's US$ 868 billion funding excludes environmentally damaging investments[38]. More generally, investors are also seeking to support sustainable companies – after all, guaranteeing continuity (increasingly correlated with socially and environmentally conscious measures) is elemental for protecting long-term financial health. Based on surveys conducted by the Boston Consulting Group, nearly half of the investors taking part believed taking into account the Environmental, Social and Corporate Governance (ESG) goals of a company or another were important when prioritizing investments[39].

Due to the combined effects of the pandemic, growing awareness of sustainability and social change, the industry is catching up. The Pulse Report illustrated that the fashion industry has indeed improved its performance since 2018 with regards to social and environmental issues – albeit also revealing that many companies are not implementing sustainable solutions with a rapid enough pace to counteract cascading negative impacts[40]. The Higg Index (standardizing tool measuring social and environmental impacts of manufacturers) has also revealed some positive trends; there has been a year-on-year increase of 15-19% in companies implementing sustainability measures[41].

---

[33] Granskog, A., Lee, L., Magnus, K-H. and Sawers, C., 'Survey: Consumer Sentiment on Sustainability in Fashion', *McKinsey & Company: Retail Survey,* 17 July 2020, https://www.mckinsey.com/industries/retail/our-insights/survey-consumer-sentiment-on-sustainability-in-fashion, (accessed 18 December 2020)

[34] Beaton, H. 'The Future of Sustainable Fashion: COVID-19 Update', *Luxiders,* 2020, https://luxiders.com/the-future-of-sustainable-fashion-covid-19/, (accessed 17 December 2020)

[35] Mehta, S., Saxena, T. and Purohit, N. 'The New Consumer Behavior Paradigm Amid COVID-19: Permanent or Transient?', *Journal of Health Management,* vol. 22, no. 2, 2020, pp. 291-301

[36] Capgemini Research Institute, *Consumer Products and Retail: How Sustainability is Fundamentally Changing Consumer Preferences,* Paris, 2020,

[37] Glover, S. 'Consumers Want Sustainability Post Lockdown', *Ecotextile,* 10 August 2020, https://www.ecotextile.com/2020081026509/fashion-retail-news/consumers-want-sustainability-post-covid-20.html, (accessed 17 December 2020).

[38] Unnikrishnan, S., Biggs, C. and Singh, N., 'Sustainability Matters now More than Ever for Consumer Companies', *Boston Consulting Group,* 11 August 2020, https://www.bcg.com/publications/2020/sustainability-matters-now-more-than-ever-for-consumer-companies, (accessed 17 December 2020).

[39] Farag, H. et al., 'ESG Commitments are Here to Stay', *Boston Consulting Group,* 23 June 2020, https://www.bcg.com/publications/2020/esg-commitments-are-here-to-stay, (accessed 17 December 2020)

[40] Boston Consulting Group, *The Pulse of the Fashion Industry: 2019 Update,* 2019, p. 1

[41] Boston Consulting Group, Sustainable Apparel Coalition and Higg Co, *Weaving a Better Future: Rebuilding a More Sustainable Fashion Industry after COVID-19,* Amsterdam, 2020, p.1

Changes have also been witnessed with regards to labor rights and manufacturing processes; according to the 2019 Ethical Fashion Report, 61% of the 130 assessed companies (480 global brands) have devised policies addressing gender inequalities in supply chains, and 45% aim to improve working conditions in their factories by enhancing responsible buying practices[42]. Furthermore, 35% of the companies are addressing child or forced labor if it is found in their supply chain, and 35% also have comprehensive Manufacturing Restrictive Substance Lists which seek to ensure that workers are not exposed to hazardous materials or chemicals[43]. Yet, despite such progress, a lot more needs to be done to increase the sustainability in its environmental and social dimensions up and down the supply chains of the fashion industry.

2.2 GREENWASHING: BEYOND THE LAUNDERED VENEER OF SUSTAINABILITY

Despite the ongoing momentum behind sustainability, not all change has been positive. Indeed, sustainability, ethical production, and other 'buzzwords' can easily become marketing strategies for companies in the absence of accountability measures which would guarantee that retailers and producers stick to their targets. In efforts to appeal to the conscious consumer, brands may engage in *greenwashing* to mislead buyers about the environmental or social benefits of their products to encourage shopping. The phenomenon is very complex: no generally accepted definition for greenwashing exists. However, it can be best understood as disinformation or misrepresentation that companies utilize when communicating their initiatives seeking (or feigning) to address sustainability. Despite the ongoing progress, greenwashing is an alarming turn; it allows companies to cut corners behind the curtain of 'appearing green', given that consumers cannot assess whether or not a firm has actually sustained their stated environmental or social performance[44].

---

[42] Baptist World Aid, *The 2019 Ethical Fashion Report: The Truth Behind the Barcode,* North Ryde, Australia, 2019, p. 7

[43] ibid.

[44] Lee, H. C. B., Cruz, J. M. and Shankar, R. 'Corporate Social Responsibility (CSR) Issues in Supply Chain Competition: Should Greenwashing Be Regulated?', *Decision Sciences,* vol. 49, no. 6, 2018, p. 1088-1089 (pp. 1088- 1115).

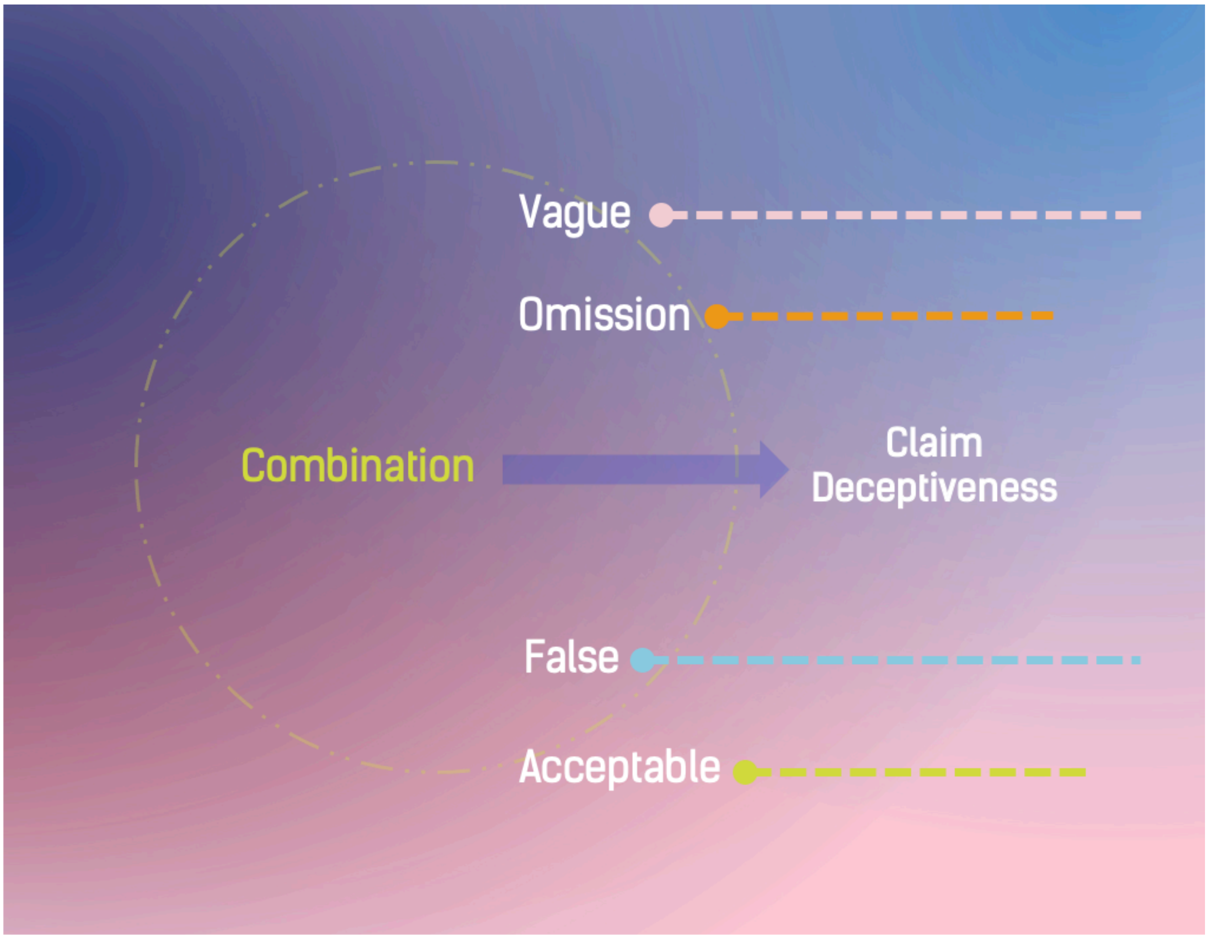


Figure 5. Types of greenwashing claims corporations may use to mislead clients. Styled from Netto, et al.[45]

The typology of greenwashing often involves misrepresenting products themselves, or includes misleading claims that intend to obscure the true environmental or social costs associated with the stages of production, retailing, shipping and so on. For instance, misleading can occur through vague claims (lacking definition), omission (leaving out important information), through lies and false claims, or sometimes, combination of misleading claims and acceptable ones (figure 5). Given the amount of information available to consumers today, separating faux fabrications from true action and ethical commitments remain near impossible. Even among consumers considered experts, identifying greenwashing as it occurs in advertising remains challenging[46].

[45] Netto, S., et al., 'Concepts and Forms of Greenwashing: A Systematic Review', *Environmental Sciences Europe,* 32(19), 2020, p. 8
[46] ibid.

Furthermore, the public image of a company or organization is often tied to their practice of Corporate Social Responsibility (CSR), which are largely voluntary commitments referring to private social auditing of organizations to reduce reputational risks emerging from poor labor conditions[47] (or negative environmental impacts). Therefore, the sense of responsibility is being driven by the corporate anxiety to sustain positive branding vis-à-vis activist groups, as opposed to legitimate concerns about labor, methods of production, or the damage caused to nature. Thus, given the flexible voluntarism that characterizes CSR approaches, they do not encourage credible commitments to achieving targets[48], and can inspire distrust among consumers which further muddles the understanding as to what truly constitutes 'sustainable' among concerned buyers[49].

2.3 TRANSPARENCY INDICES

Given the dangers of greenwashing, the fashion industry requires accountability, reinforced by tracking tools which record and evaluate sustainable practices and their impacts. To move past beyond the veneer of sustainability, the industry today must enforce two factors: transparency, and legal accountability. Indeed, if we do not know where our clothes have been made, and by whom, it will be impossible for stakeholders to work together to fix issues that are otherwise allowed to remain hidden. Therefore, crucial supply chain information should be made available to consumers, investors, lawmakers, NGOs, trade unions, workers and governments to encourage accountability and drive positive change through increased scrutiny[50]. Yet, challenges remain. The 2020 Fashion Transparency Index revealed that 54% of the assessed brands score 20% or less in transparency with regards to environmental and social issues, and many had not taken any steps to increase their transparency between 2017 and 2020[51]. Another report, *Tailored Wages: The state of pay in the global garment industry*, revealed that from the 85% of the assessed companies which had made a commitment to guaranteeing a living wage, none had provided documented evidence of implementing these promises[52].

---

[47] Donaghey, J. and Reinecke, J. 'When Industrial Democracy Meets Corporate Social Responsibility – A Comparison of the Bangladesh Accord and Alliance as Responses to the Rana Plaza Disaster', *British Journal of Industrial Relations,* vol. 56, no. 1, 2018, p.15-17

[48] ibid. p. 20

[49] Aji, H. M. and Sutikno, B. 'The Extended Consequence of Greenwashing: Perceived Consumer Skepticism', *International Journal of Business and Information,* vol. 10, no. 4, 2015, pp. 434-468.

[50] Fashion Revolution, *Fashion Transparency Index: 2020 Edition,* 2020, p. 10

[51] Fashion Revolution, *Fashion Transparency Index: 2020 Edition,* 2020, p. 4

[52] Clean Clothes Campaign, *Tailored Wages 2019: The State of Pay in the Global Garment Industry,* 2019, p.5-6

3. ADVOCATES FOR CHANGE: SUSTAINABLE FASHION GOVERNANCE AND GRASS-ROOT INITIATIVES

Sustainable change does not happen on its own. After all, the main concern of retailers, producers and actors operating in the supply chains is to maximize profits, customer spending and returns for investors. Sustainability often fits poorly into this agenda, due to the fact that the industry is still largely reliant on fast fashion, rapidly evolving collections and the exploitive use of unregulated labor. However, there remains hope, found in the actions of concerned governments, NGOs, civil-society organizations, designers, brands and consumers who have dedicated themselves to change. In efforts to elaborate how on-going sustainability trends can be strengthened further, bright spots and exemplary initiatives must be elaborated further here.

3.1 TRANSNATIONAL AGREEMENTS AND GOVERNMENT EFFORTS

To begin, one should assess global initiatives, governmental and non-governmental efforts due to their influence over the fashion industry. Among initiatives with a wider reach, the Global Fashion Agenda has been developed as a leadership forum to foster sustainability. Their 2020 Circular Fashion System Commitment was established to encourage cyclability by implementing design strategies encouraging reuse and upcycling, increasing the volume of used garments and footwear collected and resold, and increasing the share of garments and footwear made from recycled fibers[53]. As of 2018, 94 companies (12.5% of the global fashion market) had signed on[54], and as of June 2019, participating companies had collected approximately two million items and 20,000 tons of textiles and footwear to be repurposed[55]. GFA also engages policymakers, given that legislators play a key role in supporting the signatories' ability to implement and sustain a circular fashion system.

---

[53] Global Fashion Agenda, *2020 Circular Fashion System Commitment: 2018 Status Report,* Copenhagen, 2018, p. 4

[54] J. X. Wu and L. Li, 'Sustainability Initiatives in the Fashion Industry', *Fashion Industry: An Itinerary Between Feelings and Technology,* R. Beltramo (ed.), London, IntechOpen, 2019

[55] P4G Partnerships, 'About', *2020 Circular Fashion System Commitment,* 2019, https://p4gpartnerships.org/partnership/2020-circular-fashion-system-commitment, (accessed 18 December 2020).

In 2018, the Fashion Industry Charter for Climate Action was launched under the auspices of UN Climate Change, bringing together brands, retailers, suppliers and major shipping companies to address the environmental impacts of the sector. Its signatories include 43 industry leaders from Burberry to H&M, Levi Strauss & Co., Puma, Hugo Boss and Gap, among others, all recognizing the role the fashion industry plays in managing the climate crisis[56]. Signatories are seeking to reduce their aggregate greenhouse gas emissions by 30% by 2030, and have defined targeted measures to achieve these goals, including the phasing-out of coal-boilers. The Charter has a global reach: it is supported by China National Textile and Apparel Council, the Global Fashion Agenda, International Finance Corporation, Sustainable Fashion Academy, and the WWF International among others. Similarly, the Sustainable Apparel Coalition is also leading groundbreaking industry collaboration on improving the textile industry, bringing together more than 250 member organizations from 35 countries[57].

In Europe, one of the leading sustainability initiatives is the Sustainable Clothing Action Plan of 2020 [SCAP, led by the Waste and Resources Action Programme (WRAP)], which is seeking to reduce carbon emissions, waste and water consumption associated with the fashion industry in the United Kingdom, Europe and beyond[58]. It is a collaborative framework and voluntary commitment for reducing the use of resources, and as of 2020, over 80 organizations across the UK have made pledges to hit industry-led targets[59]. In the UK alone, meeting the SCAP targets by 2020 would translate to decreasing CO_2 emissions by 1.2 billion tons, 420 billion m^3 of water and 64 000 tons of waste[60]. Between 2012-2017, SCAP retailers had reduced their water footprints below 2020 targets and had reduced carbon footprints by over 8% (figure 6). Based on the SCAP principles, European Sustainable Clothing Action Plan (LIFE ECAP) has also been developed to adopt a circular approach to divert 90 000 tons of clothing waste annually from landfills by 2018[61]. It is hoped that by 2030, the initiative will have managed to avert over 700 000 tons of waste annually, corresponding to an approximate monetary value of US$ 170 million saved in waste management costs. Whilst the project ended in 2019, partners involved in ECAP were expected to continue utilizing learnings and resources to inform future projects and development of the industry to support the wider sustainability agenda.

---

[56] United Nations, 'Milestone Fashion Industry Charter for Climate Action Launched', *UN Climate Press Release,* 10 December 2018, https://unfccc.int/news/milestone-fashion-industry-charter-for-climate-action-launched, (accessed 18 December 2020).

[57] Sustainable Apparel Coalition, 'Our Vision', *Sustainable Apparel Coalition: Transforming the Apparel, Footwear and Textile Industry',* 2020, https://apparelcoalition.org, (accessed 10 December 2020).

[58] WRAP, 'Sustainable Clothing Action Plan (SCAP)', *WRAP: Our Plan,* 2020, http://www.wrap.org.uk/sustainable-textiles/scap, (accessed 24 November 2020)

[59] ibid.

[60] European Clothing Action Plan, 'Life ECAP: European Sustainable Clothing Action Plan'*, Project LIFE14 ENV/UK/000257,* 2015

[61] ibid.

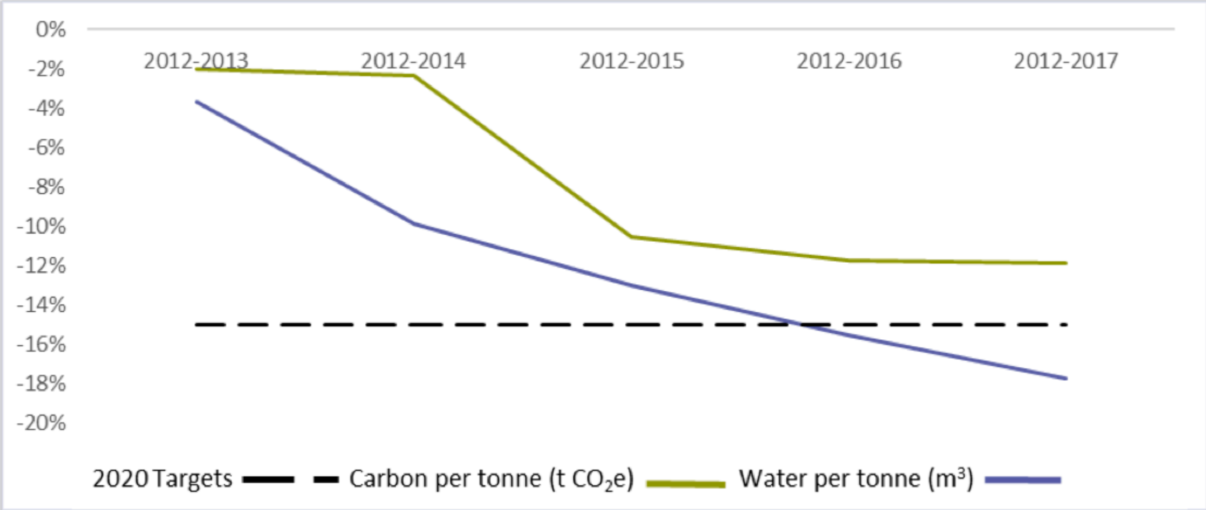


Figure 6. Percentage reduction in SCAP retailers' carbon and water footprints (per tons) vis-à-vis 15% target between 2012 to 2017[62]

Similarly, in 2015, the Nordic Council of Ministers for the Environment (Nordic Council referring to the inter-parliamentary platform for cooperation among the Nordic countries) put forth the action plan for sustainable fashion and textiles. The plan, titled 'Well Dressed in a Clean Environment' included six steps seeking to improve long-term sustainability of fashion with a focus on Nordic Design, lowering environmental impacts of production, and by encouraging market trends towards recycling. Furthermore, the action plan sought to address reducing the use of harmful chemicals in textiles, and worked towards making the Nordic Region a leader in developing new sustainable business models for circular fashion economy[63]. Furthermore, promotion of joint Nordic supply chains management was highlighted as a cornerstone for achieving reduction in negative environmental, health and social impacts. As a result, six tangible initiatives were developed to achieve the goals identified in the original plan, with a range of outputs which all sought to address challenges in greening the fashion industry in the Nordic region.

Governments have excelled in driving progress without engaging in transnational platforms. Many have taken note of the Sustainable Development Goals, and implemented them in various ways to improve the performance of the fashion industry in their respective countries. In 2018, the government of China announced its plan to mainstream sustainable practices in its apparel manufacturing industry; and in India, the government launched Project SURE in 2019, seeking to reinforce sustainable fashion trends[64]. Similarly, France announced its decision to make Paris the capital of

[62] Gray, S., *Progress Report: Sustainable Clothing Action Plan 2020 Commitment – Progress Against Footprint Reduction Targets 2012-2017,* WRAP, 2018, p. 4

[63] Nordic Council of Ministers, *Well Dressed in a Clean Environment: Nordic Action Plan for Sustainable Fashion and Textiles,* Norden, 2015, p. 10-11.

[64] Business Research Company, 'Sustainable Fashion Market Analysis Shows the Market Progress in Attempt to Decrease Pollution in the Global Ethical Fashion Market 2020, *Global Newswire,* 28 October 2020,

sustainable fashion by 2024, and in February 2020, the government passed regulations which require companies to follow 100 different sustainability provisions (including a prohibition regarding the destruction of unsold items). In the UK, facing the pressures of COVID-19, the All-Party Political Group (cross-party groups run by and for Members of the Commons and Lords seeking to advice administration) suggested that it is time to rebuild the fashion industry into a more sustainable one. The APPG highlighted the need for strategic investments by the government to stimulate growth and green recovery, to reassess the fashion business model, all in consideration of left-behind communities[65]. Such government-led initiatives can be found across the globe.

Governments have also responded to certain events, such as the Rana Plaza disaster. In acknowledgement of the fact that the 'ends' of fuzzy, unregulated supply chains can result in dangerous working conditions and low pay, some have made strides to reinforce the procurement of goods from the receiving ends. In Germany, the policy responses to the Rana Plaza disaster included the German Partnership for Sustainable Textiles, Garment Industries Transparency Initiative, and the intention to develop a Employment Injury Protection Scheme for Bangladeshi workers, and other efforts focusing on more sustainable public procurement[66]. In 2019, the government also introduced the Green Button, world's first governmental sustainability label awarded for manufacturers that adhere to several social and environmental standards (including responsibilities to identify and address risks to workers in supply chains). In 2021, the government also agreed to establish legislation that will leverage companies to maintain these standards. This 'due diligence law' will make German companies liable for abuses that occur in their supply chains and enables trade unions and NGOs to take companies to court on behalf of the victims[67]. Such changes are important steps forward to promote transparency of the industry in Germany, and improve the working conditions in the global garment industry, even if they were largely production-based.

---

https://www.globenewswire.com/news-release/2020/10/28/2116073/0/en/Sustainable-Fashion-Market-Analysis-Shows-The-Market-Progress-In-Attempt-To-Decrease-Pollution-In-The-Global-Ethicalfashion-Market-2020.html, (accessed 10 December 2020).

[65] APPG, *APPG Executive Summary 2020: Making the UK a Global Leader in Sustainable Fashion,* London, 2020, p. 4-7

[66] Lohmeyer, N. and Schüßler, E. 'Rana Plaza as a Threat to the Fast Fashion Model? An Analysis of Institutional Responses to the Disaster in Germany', *Eco Friendly and Fair: Fast Fashion and Consumer Behavior,* Becker-Leifhold, C. and Heuer, M. (eds.), Sheffield, Greenleaf Publishing, 2018,

[67] Barrie, L., 'Germany Agrees New Law on Supply Chain Due Diligence', *Just Style,* 19 February 2021, https://www.just-style.com/news/germany-agrees-new-law-on-supply-chain-due-diligence_id140784.aspx

3.2 NON-GOVERNMENTAL ORGANIZATIONS

Figure 7. The 3% Mountain, picture by Redress[68]

While transnational agreements and government activities remain important, NGOs play an elemental role in leveraging companies and governments to focus on sustainability and ethics with regards to the fashion industry. For instance, the case of Redress in Hong Kong serves a good example. They seek to promote environmental sustainability in Asia's fashion industry by advocating for reducing waste, pollution, consumption of water and energy[69]. Furthermore, they seek to cut through the terminological confusion arising from jargon related to sustainable fashion by focusing on reducing pre- and post-consumer waste (extending the lifespan of clothes), changing attitudes towards reusing and upcycling, and so on[70]. Redress has also utilized strategic public relations tactics designed to trigger wider public attention, such as 'The 3% Mountain', which depicted a six-meter-high pile of secondhand clothes, representing just 3% of the average textile waste ending up in Hong Kong's landfills daily in 2011[71]. Such arresting, art-like messaging can be very useful in communicating anti-consumerism messages and environmental consciousness to consumers. Finally, they seek to achieve transformation in the industry, by highlighting sustainable

[68] Redress, 'The 3% Mountain', *Events,* 2020, https://www.redress.com.hk/events/2011/6/15/the-3-mountain, (accessed 20 January 2021)

[69] Redress, 'Our Story: What We Do', *Redress,* Hong Kong, 2020, https://www.redress.com.hk/about/story#, (accessed 2 December 2020)

[70] Peirson-Smith, A. and Craik, J. 'Transforming Sustainable Fashion in a Decolonial Context: The Case of Redress in Hong Kong', *Fashion Theory: The Journal of Dress, Body and Culture,* vol. 24, no. 6, 2020, p. 930-932 (pp. 921-946)

[71] ibib, p. 933

fashion as something high-quality, ethical and luxe in efforts to cut through cultural sensibilities and perceptions of ecological clothing as poor-quality products[72].

Ellen McArthur Foundation is another important contributor to the sustainable fashion momentum (focusing on general commodity production as well), seeking to reinforce circular clothing economy based on principles of designing out waste and pollution, and by focusing on the balanced use of resources[73]. They engage with businesses, academia, policymakers and other institutions to inspire new solutions to managing production globally, and scale up existing ones. Fashion Revolution is another transnational NGO, campaigning for a clean, safe, fair, transparent and accountable fashion industry by engaging with brands, designers, producers, consumers and other partners through research, education, advocacy and collaborative projects[74]. Like many others, they look beyond the environment, and seek to address working conditions, equal pay, giving workers a voice and representation and bridge inequities, all in consideration of sustainable development.

The momentum seeking to address rights of workers is growing as well. One cannot go on without mentioning the International Labor Organization, Stop the Traffik or the Worker Rights Consortium, all seeking to address issues regarding modern slavery, unequal pay, poor working conditions, social injustices and dangers that workers may face at the poorly managed ends of global supply chains. For instance, Global Union Federations (GUFs) were involved in the design of governance response following the Rana Plaza disaster. IndustriALL and UniGlobal were representing garment workers in Bangladesh to negotiate with brands to push them to signing agreements on the protection of labor rights[75]. These transnational efforts led to a collective agreement between two GUFs, eight Bangladeshi labor unions, and over 200 buyer companies from Europe, North America and Asia, leading to the formation of the Accord on Fire and Building Safety in Bangladesh to improve workers' safety. The Accord, as a legally binding agreement, signaled previously unseen change in the transnational supply chain governance; brands were required to contribute financially to the targets, members agreed to maintain their purchasing volumes from Bangladesh (for two years), thus creating a balance between interests of labor and corporations through legal accountability[76].

[72] ibid, p. 939

[73] Ellen McArthur Foundation, *What is the Circular Economy?,* 2020, https://www.ellenmacarthurfoundation.org/circular-economy/what-is-the-circular-economy, (accessed 17 December 2020).

[74] Fashion Revolution, We Are Fashion Revolution, 2020, https://www.fashionrevolution.org, (accessed 17 December 2020).

[75] Donaghey, J. and Reinecke, J. 'When Industrial Democracy Meets Corporate Social Responsibility – A Comparison of the Bangladesh Accord and Alliance as Responses to the Rana Plaza Disaster', *British Journal of Industrial Relations,* vol. 56, no. 1, 2018, p.24-25 (pp. 14-42)

[76] ibid. p. 24-25

3.3 BRANDS AND RETAILERS

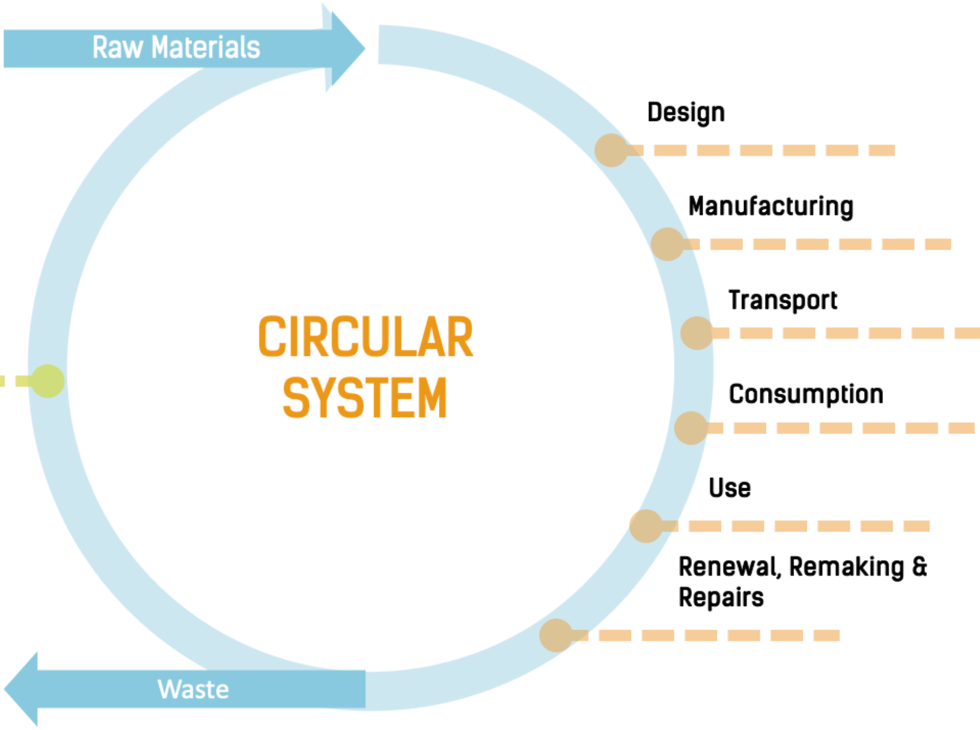


Figure 8. Circular fashion system, stylized from Eileen Fisher[77]

Finally, one must look to brands and their role in driving sustainable momentum in both, environmental and social dimensions. Brands are indeed important contributors to sustainable fashion; increasingly, their focus should be on supporting customers in consuming fewer clothes by reducing supply, reducing discounting, and consider new approaches to increasing their own transparency[78]. Numerous brands have invested in supporting such a trajectory, including Patagonia, which produced approximately 10,000 jackets, sweaters and bags for its ReCrafted Line upcycled from old garments[79]. Given their years of experience in sustainable fashion, Patagonia and similar companies are in a unique position to lead sustainability efforts through reducing waste and designing products which can last a lifetime.

Eileen Fisher is also considered an industry leader in ethical and sustainable fashion, given their strong focus on mitigating environmental and social injustices through monitoring supply chains, ensuring fair working wages, and reducing their greenhouse gas emissions (from production and shipping) by 25 % by 2025. Furthermore, their vision is to encourage a circular recycling model for clothing production (figure 8) in

---

[77] Eileen Fisher, *Horizon 2030: What if We Did Things Differently?’,* 2021, https://www.eileenfisher.com/horizon2030, (accessed 20 January 2021)
[78] Business of Fashion and McKinsey & Company, *The State of Fashion 2020,* New York, 2019, p. 54-55
[79] ibid.

order to achieve 100% use of sustainable materials in production by 2020[80]. The company has also committed to full transparency in the aspects of social justice (human rights and reduction of modern slavery) which is monitored through audits and training initiatives seeking to strengthen the investment to a sustainable and green future.

3.4 AT THE GRASSROOTS: ARTISANS, DESIGNERS AND THE CONSCIOUS CONSUMER

Insofar as the aforementioned chapters target sustainability from the top-down, what does it look like from the bottom-up? In fact, sustainable change does not only happen as enforced by governments, organizations and NGOs – rather, it is also social change, driven by the efforts of environmentally and socially conscious individuals and activist groups operating at the grass-root levels. Amidst buzzwords, grand movements, glitz and glamour, it is easy to overlook the most meaningful contributors to sustainable fashion: the consumers. One can hardly ignore Extinction Rebellion, for example, after they stormed London Fashion Week in 2019, with signs calling for change; "No fashion on a dead planet".[81] Whether or not one agrees with disruptive methods, the efficacy of such movements in raising public awareness cannot be overlooked. They mirror Redress's art-inspired statements mentioned earlier, drawing attention, stopping the viewer, and requiring engagement from the consumer to partake in otherwise complicated topics in novel ways.

Similarly, local artisans and designers are capable of leading change from the bottom-up, by resisting global trends and by working with their local communities to reconfigure the fashion industry on their own terms. For instance, clothing designers in the Kallio neighborhood of Helsinki in Finland have sought to revolutionize the sustainable clothing market by combining small-scale design with green values. Designers interviewed have sought to focus on upcycling, 'trashion' and zero waste, avoiding the term 'collections' (given that such notions reinforce rapidly changing product lines)[82]. Whilst sharing a strong anti-commercial ethos, their boutique shops and innovative ways are supporting the efforts to reimagine and diversify fashion in Finland, below superstructures that are often depicted as 'the industry leaders'. At the vanguard of the sustainable fashion movement, Somalian designer Nimco Adam has

[80] Eileen Fisher, 'Values', *Behind the Label,* 2020, https://www.eileenfisher.com/circular-by-design, (accessed 15 December 2020)
[81] Farra, E., 'Extinction Rebellion's Youth Group Protested New York Fashion Week with "100% Sustainable" Guerrilla Shows', *Vogue,* 11 February 2020, https://www.vogue.com/slideshow/extinction-rebellion-youth-new-york-fashion-week-protests, (accessed 16 December 2020).
[82] Gurova, O. and Morozova, D. 'Critical Approach to Sustainable Fashion: Practices of Clothing Designers in the Kallio Neighborhood of Helsinki', *Journal of Consumer Culture,* vol. 18, no. 3, 2018, p. 404-407 (pp.397-413)

also been leading by example. Her designs utilize traditional African textiles to move away from chemicals and synthetic materials, using sustainable materials such as bamboo, hemp, and nature-based dyes extracted from plant roots like turmeric[83]. Chinese-based Remake Hub, led by Sissi Chao, has turned to using recycled plastic to create apparel and consumer goods as a solution to the problem of worsening plastic pollution[84]. One could write an entire report about such grass-root initiatives; they can be found everywhere, if one keeps an eye out for them.

Finally, customers as individuals are fundamental contributors to sustainable change. Sustainable fashion 'pioneers', (individuals and groups who are concerned about the environmental and social impacts of fast fashion), are important in assessing how sustainability initiatives are translated to action among the consumers. Bly, et al. illustrated that these consumers tend to value not only environmental and ethical factors, but also freedom, uniqueness, resistance, authenticity, trust and well-being[85]. Therefore, individuals navigate the fashion landscape and its often-conflicting contours based on their personalized 'fuzzy-models' of sustainability which match their perception and knowledge about the fashion industry, and craft their own personal styles accordingly to steer clear from high-street fashion. From zero-binning to recycling, sewing and thrift shopping, sustainability-minded fashion bricoleurs build their styles by navigating through high-street alternatives amidst the muddled field of retailers. Understanding the shopping behaviors of knowledgeable customers is increasingly important to elaborate what 'sustainability' translates to on the ground, and to evaluate how effectively the globally witnessed momentum driving environmental and social justice manifests in behavior and change.

---

[83] UN Environment Programme, 'On Trend: Sustainable Fashion in the Wake of COVID-19, *Story: Resource Efficiency,* 16 June 2020, https://www.unenvironment.org/news-and-stories/story/trend-sustainable-fashion-wake-covid-19, (accessed 15 December 2020).

[84] ibid.

[85] Bly, S., Gwozdz, W. and Reisch, L. A., 'Exit from the High Street: An Exploratory Study of Sustainable Fashion Consumption Pioneers', *International Journal of Consumer Studies,* vol 39, 2015, p. 132 (pp. 125-136)

4. SUSTAINABLE FASHION IN SOUTHEAST ASIA

Perhaps subconsciously, studies and research dedicated to fashion seem to favor countries with strong middle classes, thus reinforcing the assumption that the Global North remains at the very center of style and innovation. However, to understand global trends in sustainable fashion, one must peek beyond this veneer by examining the trends in a non-Western context, such as in Asia and the Global South[86].

Whilst evidence remains sparse, this report seeks to be one of the first comprehensive reviews of emerging sustainability trends in Southeast Asian markets, hopefully to be supported by a comprehensive market survey in the near term. The following section will begin by identifying trends in SEA based on available qualitative evidence (with the regrettable omission of Brunei and Timor Leste, given the scarcity of qualitative or quantitative data regarding the status of sustainable fashion in the two aforementioned).

---

[86] Yang, S., Song, Y. and Tong, S. 'Sustainable Retailing in the Fashion Industry: A Systematic Literature Review', *Sustainability,* vol. 9, 2018, p.13 (pp.1-19)

To begin, the garment industry has been gaining momentum in the region; the emerging middle classes in the six core markets and expanding production (Vietnam, the Philippines, Indonesia, Malaysia, Thailand and Singapore) have driven the value of the markets beyond US$ 50 billion[87]. Moreover, these markets are characterized by digitally erudite, young consumers, hungry for knowledge and new styles. Yet, the countries are immensely diverse and distinct in their preferences; for instance, Thai consumers tend to favor both European and Asian trends. This is particularly evident in the popularization of Japanese *kawaii fashion* which has been gaining ground especially among young Thai women[88]. On the other hand, Filipinos have an affinity for Western brands, whilst maintaining a vibrant secondhand shopping culture[89]. Predominantly Muslim countries of Malaysia and Indonesia also have their own preferences for fashion narratives and new trends. For example, the luxury brand dUCkscarves has grown rapidly in Malaysia and Brunei due to the popularity of hijabs, signifying progressive piety among 21st-century Muslim women active on Instagram and other social media[90].

The region also comprises important manufacturing countries. For instance, Cambodia's economy is largely reliant on its garment industry (catering to 200 international brands)[91], quite like Vietnam with an industry supported by 6,000 garment and apparel firms[92]. The region also hosts important hubs for traditional handicrafts, arts and design. One can find world-class products from Laotian designers, artisans and craft merchants, produced with respect to sustainability, fine custom, culture and history[93]. Similarly, Timor-Leste has a long tradition of weaving of garments, often dyed and produced by traditional methods from hand-spun cotton.

---

[87] Kim, A., Potia, A. and Wintels, S. 'Southeast Asia: A Region of Nuanced Opportunity', *The State of Fashion 2020,* Business of Fashion and McKinsey & Company, 2020, p. 26-27

[88] Toyoshima, N. 'Kawaii Fashion in Thailand: The Consumption of Cuteness from Japan', *Journal of Asia-Pacific Studies,* No. 24, 2015, pp. 189-210

[89] ibid.

[90] Mohamad, S. M. and Hassim, N. 'Hijabi Celebrification and Hijab Consumption in Brunei and Malaysia', *Celebrity Studies',* 2019, pp. 1-25

[91] Fashion Revolution, 'Fashion Revolution: Cambodia', 2020, https://www.fashionrevolution.org/asia/cambodia/ (accessed 10 December 2020).

[92] Fashion Revolution, 'Fashion Revolution: Vietnam', 2020, https://www.fashionrevolution.org/asia/vietnam/, (accessed 10 December, 2020).

[93] Fashion Revolution, 'Fashion Revolution; Laos', 2020, https://www.fashionrevolution.org/asia/laos/, (accessed 10 December 2020).

A region of diversity, color, and continuing growth; Southeast Asia represents a gold-plated opportunity for the fashion industry. Indeed, the ASEAN region has been projected to become the world's fourth largest economic collective, potentially constituting a consumer market worth US$ 4 trillion during the upcoming decade[94]. But what of sustainability? Not a lot of evidence is currently available about consumer trends nor interests regarding sustainably and ethically produced fashion, and most articles or reports mainly address the manufacturing conditions of garments. Therefore, insight is required with regards to consumer behavior, not just manufacturing conditions, to elaborate how the global sustainable fashion trends have been affecting Southeast Asia.

Market research studies conducted by Nielsen have consistently highlighted a trend among consumers in the region who are willing to pay for sustainable products. In fact, the *Global Survey of Corporate Social Responsibility and Sustainability* illustrated that Southeast Asian consumers are willing to pay more for something sourced sustainably, with 80% preferring to buy from companies that have invested in lessening their negative social and environmental impacts[95]. Respondents from Singapore, Vietnam and the Philippines expressed that they are concerned about the commitment of companies to address these issues, and 55%, 86% and 83% were willing to pay more to support said cause in the surveyed countries, respectively[96]. This mirrors a survey by Bain, which stated that 80% of ASEAN consumers value sustainability, and have made changes in their lifestyles to become more eco-friendly[97]. Positive patterns have also been revealed in Malaysia, Thailand, Indonesia and the Philippines by MasterCard's survey, which indicated that over 70% of consumers considered whether or not a product is environmentally friendly and produced in a socially responsible manner[98].

In this context, however, one must note nuances. Indeed, the lower willingness to pay more for sustainably produced goods in Singapore (the 55% of consumers as discussed above) has been examined by DBS as well. Yet, according to their survey (whilst confirming that many are not willing to pay more), 7 in 10 Singaporeans are still

---

[94] Yendamuri, P. and Ingilizian, Z., '8 Ways ASEAN Consumer Habits will Change by 2030 – Shaped by COVID-19, Tech and More, *World Economic Forum,* 10 June 2020, https://www.weforum.org/agenda/2020/06/8-ways-asean-consumer-habits-will-change-by-2030-shaped-by-covid19-tech-and-more/, (accessed 11 December 2020).

[95] Nielsen, 'Sustainability Continues to Gain Momentum Among Singaporeans And Southeast Asian Consumers', *Nielsen Press Room,* 17 October 2015, https://www.nielsen.com/sg/en/press-releases/2015/sustainability-continues-to-gain-momentum-among-singaporeans-and-southeast-asian-consumers/, (accessed 9 December 2020).

[96] ibid.

[97] Bain in Yendamuri, P. and Ingilizian, Z., '8 Ways ASEAN Consumer Habits will Change by 2030 – Shaped by COVID-19, Tech and More, *World Economic Forum,* 10 June 2020, https://www.weforum.org/agenda/2020/06/8-ways-asean-consumer-habits-will-change-by-2030-shaped-by-covid19-tech-and-more/, (accessed 11 December 2020).

[98] MasterCard in Preuss, S. 'Consumers in Emerging Markets More Concerned about Ethics, Environment', '*Fashion United',* 7 April 2015, https://fashionunited.uk/news/retail/consumers-in-emerging-markets-more-concerned-about-ethics-environment/2015040716051, (accessed 10 December 2020).

open to upcycling, recycling or swapping their clothes[99]. Therefore, sustainable trends are still gaining traction, despite some differentiation between the ways which consumers choose to contribute to this change. Furthermore, it is important to acknowledge that consumers in Southeast Asia tend to be price-sensitive; buyers often prioritize costs and convenience over sustainability. This mirrors global trends: majority (60%) of consumers surveyed by KPGM in cities across the world would prefer sustainable fashion if it remained the same price as conventional garments[100].

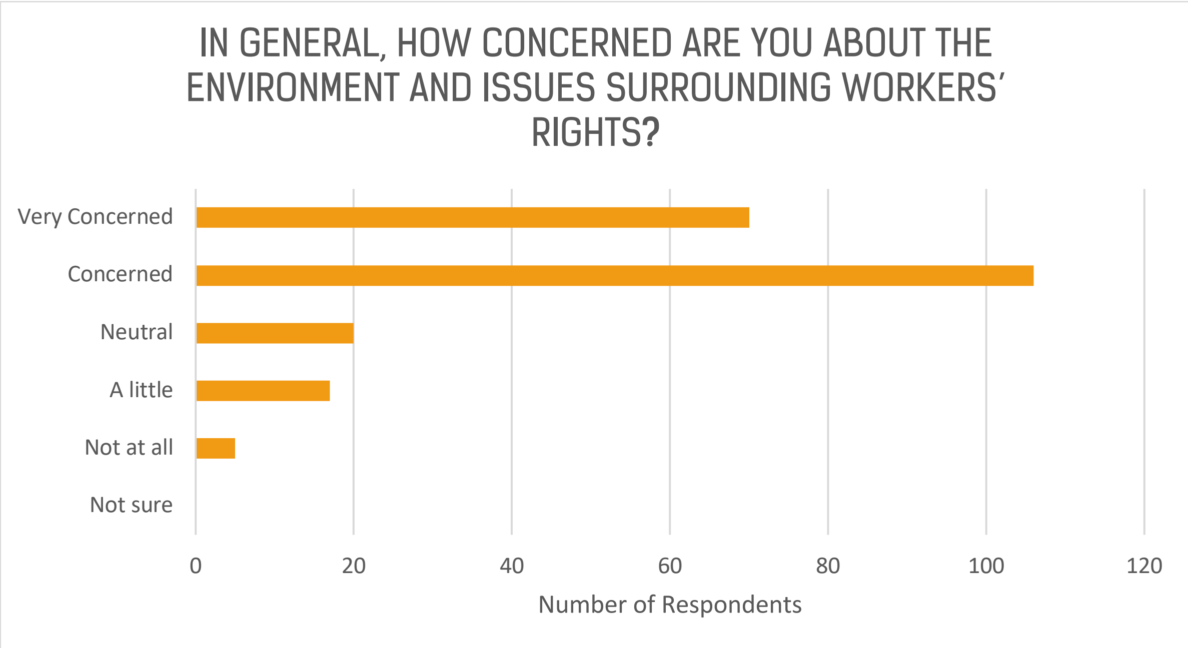


Figure 9. General concern for environmental and workers' rights issues among participants

Preliminary market survey conducted in association with this report in Singapore (see Chapter 5) mirrors aforementioned trends. For instance, ethical and environmental concerns among the survey participants did indeed influence their shopping behavior significantly. Our respondents emphasized the use of sustainably sourced material, transparency regarding supply chains, safe working conditions and fair wages, all reflected in their concerns regarding manufacturing (figure 9). Moreover, many (63%) do active research regarding clothing sustainability before purchase, but only 5% are satisfied with sustainable shopping options available to them (p.58-60, this report). Most importantly, however, 91% of our respondents were *willing to pay more* for these options. More specifically, half were willing to pay up to 20%-50% or more for sustainable clothing. Thus, these results also suggest a significant profit incentive for brands to meet such demand, at least in the context of Singapore

99 DBS, 'Singaporeans Open to Sustainable Fashion but Won't Pay More: DBS Survey', *DBS Media,* https://www.dbs.com/newsroom/Singaporeans_open_to_sustainable_fashion_but_wont_pay_more__DBS_survey, (accessed 11 December 2020).
100 KPMG, *Sustainable Fashion: A Survey on Global Perspectives,* Hong Kong, 2019, p.11

TOWARDS A BRIGHTER FUTURE: SOUTHEAST ASIA AT THE FRONTIER OF FASHION REVOLUTION.

Given the nuanced contours of consumption revealed by aforementioned evidence, this report avoids stating that the interest of Southeast Asian consumers with regards to sustainable fashion is in its ‘infancy’ or ‘underdeveloped’ (the popular discourse regarding consumer trends in the region). There is simply no reason to presume that these trends have not breached fashion consumption, for there is certainly an interest in purchasing sustainable products among the consumers of Southeast Asia.

In the future, it is hoped that the preliminary market survey found under Appendix I can be expanded across the region to elaborate this apparent conundrum between the evidence regarding emerging regional sustainability trends, and their perceived lack of integration into apparel consumption by retailers. It is suspected that consumers, whilst seeking to balance convenience and costs, are also willing to buy sustainably sourced fashion, and are partaking in cyclical clothing economies through secondhand shopping and boutique stores, therefore revealing an untapped resource for retailers and organizations interested in investing in sustainable production and the reuse of garments and footwear.

4.1 DRIVERS OF SUSTAINABLE FASHION IN SOUTHEAST ASIA

As is the case globally, the sustainable fashion revolution cannot sustain its own momentum in Southeast Asia either; one must look towards its drivers to elaborate how we can further reinforce these trends towards a greener and more ethical future of fashion in the region. This section will look into the activities of governments, non-governmental organizations, brands, designers and artists to illustrate how sustainable trends are currently being mainstreamed to terraform the landscape of the (currently) damaging fashion industry across Southeast Asian nations. Indeed, if one is hoping to influence customer behavior and awareness, initiatives discussed here must be made more prevalent in the public discourse given their potential to drive positive change. Furthermore, given the proliferation of sustainable brands, government-led initiatives, and fashion-focused NGOs in the region, one can hardly argue that there would be a lack of interest in sustainable fashion. These dimensions will be further discussed in this section.

4.1.1 THAILAND

Like in other countries of the ASEAN region, Thailand's apparel industry has been continuously growing. Starting with the 'Bangkok Fashion City' project – launched in 2004 – the capital has indeed become one of the fashion hubs of the world. Yet, given the growing middle classes and booming industry, fast fashion has also become a problem; in 2017, an estimated 40% of the surveyed Thai shoppers disposed clothing after just one wear[101]. On the other hand, Thai millennial consumers have an interest in purchasing sustainable fashion, such as garments manufactured from recycled plastic[102].

The government has responded to the concerns regarding cascading impacts of pollution and other negative impacts associated with goods production. For example, the need to promote sustainable consumption and production was highlighted in the Twelfth National Economic and Social Development Plan for 2017-2021[103]. In 2020, the Department of International Trade Promotion launched the Thai Style Solutions initiative to showcase Thai products and brands, with a focus to reconnect local craft businesses with global markets[104]. Designers partaking in the campaign focus on creative and green design solutions, for example by utilizing locally sourced silk, bamboo, upcycled furniture and recycled textiles[105]. Numerous Thai brands, including Madmatter, Taktai and Maison Craft have built their business models largely on the upcycling of old fabrics. To encourage circular fashion economies, MoreLoop Thailand has been focusing on promoting the use of deadstock fabrics by connecting designers and buyers with factories which would otherwise discard leftover fabric. Furthermore, clothing swaps have been gaining popularity in Bangkok during the recent years, therefore contributing to the sustainable momentum, and Thailand remains renowned worldwide for its locally sourced garments produced by artisans and weavers[106].

[101] YouGov, 'Fast Fashion: 40% Of Thais Have Thrown Away Clothing after Wearing it Just Once', 6 December 2017, https://th.yougov.com/en-th/news/2017/12/06/fast-fashion/#/:~:text=Support-,Fast%20fashion:%2040%25%20of%20Thais%20have%20thrown%20away%20clothing,after%20wearing%20it%20just%20once&text=Members%20of%20the%20YouGov%20staff.&text=The%20number%20of%20garments%20bought,between%202000%20and%202014%20alone, (accessed 15 December 2020).

[102] Thingpila, K. *Fabricated Future: Applying the Theory of Planned Behavior to Influence Purchase Intention of Green Fashion made from Recycled Plastic in Thailand*, Master's Thesis, The Swedish School of Textiles, 2019

[103] Office of the National Economic and Social Development Board, *Summary: The Twelfth National Economic and Social Development Plan,* Bangkok, 2017p. 20

[104] Dezeen, 'Thailand's Government Launches Thai Style Solutions Campaign to Showcase Country's Creatives', *Dezeen,* 21 October 2020, https://www.dezeen.com/2020/10/21/thai-style-solutions-thailand-products/, (accessed 15 December 2020)

[105] ibid.

[106] Chatikavanij, K. '6 Simple Ways to Shop Sustainable Fashion in Bangkok', *Lifestyle Asia,* 26 October 2019, https://www.lifestyleasia.com/bk/style/fashion/6-simple-ways-shop-sustainable-fashion-bangkok/, (accessed 16 December 2020).

One must also note the developing indie scene within the night markets of Bangkok, including Chatuchak (the JJ) and the Train Night Market, which are hosting growing alternative fashion countercultures, driven by young designers and secondhand retailers. These spaces, characterized by both, non-commercial and commercial art-inspired creative engagement, remain important in understanding how the fashion industry is developing in Thailand. Public spaces are a place for creative masses to congregate, mushrooming amidst an otherwise globalized order that can often limit the ability of grass-root level retailers and designers to bring their ideas forward to customers[107]. As such, these markets can also inspire locally driven change among environmentally and socially conscious designers and buyers, seeking to find alternatives for high-street fashion.

[107] Arvidsson, A. and Niessen, B., 'Creative Mass. Consumption, Creativity and Innovation on Bangkok's Fashion Markets', *Consumption Markets and Culture,* vol. 18, no. 2, 2015, pp. 111-132.

Yet, challenges remain. Initiatives targeting sustainable fashion have only been gaining popularity relatively recently, and consumer interests regarding the topic have not been mapped out thoroughly. The conditions of manufacturing have also been brought under questioning. For instance, the Clean Clothes Campaign revealed that some of the textile factories supporting the fashion industry in Thailand has moved their production to border towns to utilize easily exploitable migrant workers[108]. Monitoring or protecting migrants working in factories of sub-subcontractors is extremely difficult, thus leading to conditions wherein exploitative wages, poor workers' protection and dangerous working environments (exacerbated by the inability of workers to unionize) can become more common[109]. Thus, more work is required by NGOs and the government to reinforce sustainable fashion production in its environmental and ethical dimensions in Thailand.

4.1.2 INDONESIA

Given the country's position as one of the fastest-growing economies in the world, the Indonesian fashion industry has also been gaining momentum during the recent years. In 2019, the garment and textile production contributed to 18% of the country's creative economy[110], and is worth over US$ 12.7 billion in exports[111]. However, growth of manufacturing has not come without its side effects; for instance, chemicals used in dyeing often find their way into waterways with wastewater, thus harming biodiversity of rivers and human health[112]. In fact, levels of water pollution caused by the textile industry has been ranked as the second highest globally, which has led to an estimated loss of US$ 866 million over the past two decades due to contamination of rice fields and farmland[113]. Fortunately, such issues have not gone unnoticed, and the government has responded to these concerns; in 2018, four textile production facilities in West Java region were shut down due to the harmful practice of polluting rivers in the region[114]. Several eco-labels have also been established, targeting the textile industry; hosted by various institutions, the labels seek to award companies with recognized sustainable, green and ethical production methods to distinguish positive-impact manufacturers[115].

---

[108] Clean Clothes Campaign, *Migrant Workers in Thailand's Garment Factories,* Amsterdam, 2014, p. 5
[109] ibid.
[110] CNBC in Fiarani, R. 'Indonesian Market Insight for Global Fashion Companies', *Medium,* 2019, https://medium.com/with-bright-indonesia/indonesian-market-insight-for-global-fashion-companies-61b34b06a873, (accessed 13 December 2020).
[111] Price, D. 'Worse for Wear: Indonesia's Textile Boom', *UNDark,* 23 February 2017, https://undark.org/2017/02/23/indonesia-textiles-citarum-river-pollution-2/, (accessed 15 December 2020).
[112] ibid.
[113] Prihandono, I. and Religi, F. H. 'Business and Human Rights Concerns in the Indonesian Textile Industry', *Yuridika,* vol. 34, no. 3, 2019, p. 493, (pp. 493-525)
[114] Styles, D. 'Indonesian President Signals River Pollution Reform', *Ecotextile News*, 5 February 2018, https://www.ecotextile.com/2018020523238/dyes-chemicals-news/indonesian-president-signals-river-pollution-reform.html, (accessed 14 December 2020).
[115] Prihandono, I. and Religi, F. H., p. 514, (pp. 493-525)

Given the magnitude of the industry's negative impacts, the public awareness regarding sustainable fashion is shifting. While some have stated that knowledge of sustainable fashion in the country remains low[116], conscious consumers have started to search for sustainable options[117]. Younger millennials in the country have been established to be ecologically conscious, leading to increased 'green' buying behavior and reuse of clothes[118]. If one looks beyond production and shopping, recycling practices are indeed relatively common, reinforcing a more circular fashion economy. According to a YouGov survey 66% and 50% of all Indonesian respondents have given unwanted clothes to friends and family, or donated them to charity, respectively[119].

As a response to increased awareness, ready-to-wear labels and boutique shops focusing on sustainability have started to bourgeon across Indonesia, from brands utilizing organic cottons, textile scrap waste, natural dyes to traditional production methods[120]. Positive impacts of brands can extend beyond the environment; for example, Sejauh Mata Memandang's Jakarta Kita Collection in 2017 collaborated with women living in Jakarta's largest social housing complex, and the brand Lekat has worked with Baduy women from Banden to incorporate traditional handwoven textiles into their garments[121]. By supporting marginalized groups and communities, traditional artists and craftspeople, brands can inspire sustainable social change as well. Alongside brands, NGOs including the Indonesian Fashion Chamber (IFC) have contributed to change. The IFC, formed by its members comprising Indonesia's leading fashion entrepreneurs and designers, shifted their focus to Sustainability from 2020 onwards, with the intention of nurturing circular fashion economies. With regards to working conditions, FairWear Foundation Indonesia has focused on advocating for labor rights, fair wages, and equity through engaging with the government, manufacturers, trade unions and other stakeholders.

---

[116] Tanzil, M. Y., 'The Sustainable Practices of Indonesian Fashion Brands', *Program Book & Proceeding of the 1st International Conference on Art, Craft, Culture and Design 2017,* Bandung, Indonesia, 5-6 September 2017, p. 205

[117] Shihab, S., 'Post Fast Fashion: The Future of Fashion and the Rise of Resale, *The Jakarta Post,* 2 October 2019, https://www.thejakartapost.com/life/2019/10/02/post-fast-fashion-the-future-of-fashion-and-the-rise-of-resale.html, (accessed 13 December 2020).

[118] Parung, C. A., 'How do the Indonesian Ecologically Conscious Millennials Value Upcycled Clothing?', *International Conference on Informatics, Technology and Engineering Series,* vol. 703, 2019, pp. 1-6

[119] YouGov, 'Fast Fashion: 3 in 10 Indonesians Have Thrown Away Clothing After Wearing it Just Once', *YouGov,* 6 December 2017, https://id.yougov.com/en-id/news/2017/12/06/fast-fashion/, (accessed 16 December 2020)

[120] Amandari, A. S. and Wirengjurit, E. 'Fashion, but Make it Sustainable, '*Manual,* 28 August 2019, https://manual.co.id/article/sustainable-fashion-indonesia/, (accessed 14 December 2020)

[121] ibid.

However, due to the fact that consumer awareness is relatively low, sustainable change is not considered entrenched in consumer behavior. Geospatial disparities in income also contribute to these issues; the 'middle class' remains relatively small, whilst vast majority of the consumers in the country are just emerging. Therefore, price tends to prevail over garments sourced with consideration to the environment and social issues. Sustainable fashion is still considered a niche, more expensive option[122]. One must also retain a critical eye to on-going initiatives with regards to potential greenwashing. 'Indonesia's Fourth Industrial Revolution' (Industry 4.0) can elaborate this argument. Partly in efforts to mainstream sustainability in manufacturing, these plans include considerations for garments. Cellulose-based viscose has been presented as an alternative to polyester, acrylic and nylon in Indonesian manufacturing to reinforce the use of greener fibers in production[123]. However, due to the fact that the rate of primary natural forest loss rates in the tropical region is among the highest in Indonesia (driven by large-scale oil and timber plantations)[124], one must question the efficacy of wood-based products as truly sustainable alternatives.

Finally, workers' rights remain a concern across Indonesia, depending on the region. Even though large corporations operating in the country (from GAP to H&M and Inditex) have all implemented policies seeking to reinforce the protection of workers (in the dimensions of pay, age, gender and safety, for example), reinforcing them in practice remains complicated in the absence of uniform standards[125]. Human rights abuses have taken place due to companies' failure to pay for overtime, or by the use of non-standard contracts and failures to maintain safe working conditions, issues which are magnified depending on the scale of production. Whilst working conditions and the protection of workers in garment factories indeed vary considerably, they tend to be worse in small to medium-sized enterprises which do not have the levels of scrutiny that larger suppliers, buyers and international brands are subjected to[126].

[122] Rahman, R. and Eloksari, E. A., 'Price, Style More Important for Indonesia's Consumers Than Sustainable Fashion', *Jakarta Post,* 27 November 2019, https://www.thejakartapost.com/news/2019/11/26/price-style-more-important-for-indonesias-consumers-than-sustainable-fashion.html, (accessed 12 December 2020).
[123] Hsu, H. 'Indonesia Expands Textile Productionm Claiming Sustainability, *The News Lens,* 2 March 2020, https://international.thenewslens.com/article/131895, (accessed 10 December 2020).
[124] Austin, K. G., Schwantes, A., Gu, Y. and Kasibhatla, P. S., 'What Causes Deforestation in Indonesia?', *Environmental Research Letters,* vol. 14, no. 2, 2019, p. 1-2 (pp. 1-9)
[125] Prihandono, I. and Religi, F. H. p. 518, (pp. 493-525)
[126] Fair Wear Foundation, *Indonesia Country Study: Wage Update 2019,* Jakarta, 2018, p. 3

4.1.3 THE PHILIPPINES

The Philippines was considered a textile-production pioneer in the ASEAN region between 1960s and 1990s, but the country's competitiveness in the industry has declined since[127]. Nonetheless, garment exports were valued around US$ 906 million in 2019, and as per the government's 10 Year Plan, the intention is to bring the Philippines up to the top 10 garments suppliers in the world between 2026-2029. In recognition of this, and the need to invest in a more sustainable future, the Board of Investments (BOI) has changed their focus to target new opportunities in the emerging sustainable fashion markets to nurture green growth[128].

Locally produced fabrics and materials are being explored: for instance, BOI is working with designers recycling scraps sourced from manufacturers from Region 4A and Mindanao, alongside similar initiatives that are seeking to carve their way into the (currently) niche sustainable fashion markets. Already in 2014, the International Fashion Showcase featured six designers incorporating sustainable materials in indigenous designs, in partnerships with NGOs and local artisans to support community development through their work[129].

[127] Bueno, A., 'How This Government Facility is Saving Philippine Textiles', *CNN Philippines,* 22 December 2018, https://www.cnnphilippines.com/life/style/2018/12/5/Philippine-Textile-Research-Institute.html, (accessed 10 January 2021)
[128] Cahiles-Magkilat, B., 'BOI To Promote Sustainable Fashion', *Manila Bulletin,* 21 November 2019, https://mb.com.ph/2019/11/21/boi-to-promote-sustainable-fashion/, (accessed 10 January 2020)
[129] de León, 'Fashion Designers Benefit Communities in Philippines with Indigenous Textiles', *The Guardian,* 4 March 2014, https://www.theguardian.com/sustainable-business/sustainable-fashi÷cxon-blog/fashion-

Fibers sourced from pineapple (*piña),* abacá and coconut are increasing in their popularity, provide new opportunities for more sustainable textile production in the country, and have the potential of achieving global reach. Such initiatives highlight the promise for a greener future of fashion in the Philippines and exemplify the importance of emerging sustainable markets in the wider system of manufacturing globally.

However, the path to sustainability is not straightforward. For example, despite the Republic Act 4653 which renders commercially imported used textiles to the Philippines illegal, illicit imports by external operators are widespread across the country. The sheer volume of items promotes rapid disposal of clothing, and places the Philippines in a problematic position at the receiving end of (mostly Western) used garments and discarded products[130]. Yet, the issue has also provided numerous opportunities for local businesses and designers seeking to enter circular clothing economies. The recycling phenomenon associated with imports is described as the *halukay* (to dig up) culture or *ukay-ukay*, arising from the desire to buy affordable, yet good-quality and fashionable clothing[131]. *Ukay* secondhand culture, speculated to originate in Baguio during the 1980s, refers to the act of digging up piles of clothes to make a good find, sourced from the imported clothing or stocks originating from retailers who forward lower-quality products (often class C, 'the not-so-good') to be sold by *ukay-ukay* businesses without formal stalls[132]. These are products that would otherwise end up in incineration plants or landfills – therefore, *ukay-ukay* offers a new avenue for lengthening a product's lifecycle, even if the system does not address the problems in terms of how they were produced.

Designers have also taken note of this practice; for instance, Denuo, founded by Monica Vivar, focuses on upcycling *ukay-ukay* items to recirculate existing clothes in the retail cycle. Now, in recognition of the fact that immense amounts of already existing garments are wasted globally, taking note of such secondhand schemes can be immensely valuable when discussing circular fashion economies. However, there is no reason why Philippines alone should be at the receiving end of used clothing imports – rather, exploring ways of expanding recirculating clothes globally would be a more fruitful avenue to pursue.

design-philippines-textile-innovation, (accessed 10 January 2020).

130 Fashion Revolution Philippines, *The Impact of the Importation of Second-hand Clothing in the Philippines,* Fashion Revolution, 2019, p. 8-9

131 Biana, T. H., 'The Philippine *Ukay-Ukay* Culture as Sustainable Fashion, *Business and Economics Review,* vol. 30, no. 1, 2020, p. 155 (pp. 154-164)

132 ibid. p. 157

4.1.4 SINGAPORE

As one of the central business hubs in Asia, the cosmopolitan city-state of Singapore is at frontier of fashion consumption in the region. The country has an apparel market valued at US$ 2,705 million in 2020, and shopping is considered a national hobby; 49% of Singaporeans consider it as their favorite pastime[133]. Given the magnitude of apparel consumption in the country, sustainability should be among the key concerns of retailers and consumers – however, such trajectories are not yet mainstream. Disconnected from production, many Singaporeans remain detached from the impacts of manufacturing, which has been suspected to contribute to the low interest with respect to sustainable fashion. Furthermore, the government has remained somewhat absent in the discussion of standards that should be established to regulate the supply chains, ensuring that clothing is sourced from responsible companies[134]. In a country characterized by an abundance of shopping malls, these concerns are to be taken seriously.

Yet, the consumers are becoming increasingly aware of the issues related to the fashion industry. Singaporeans today are becoming more and more eco-conscious about the ways in which their lifestyles affect the environment[135]. While there are not many studies exploring the current state of sustainable fashion consumption in the country – a fact this project seeks to change – a change of interests is still very much evident. For instance, clothes swaps organized by The Fashion Pulpit have gained recognition as a method of encouraging the reuse of pre-owned garments in efforts to reduce the average footprint of Singaporean consumers (figure 10). Swapping through the initiative has managed to save 75,000 fashion items from disposal between 2018-2020[136]. Similarly, the popularity of renting clothes is gaining ground, not to mention secondhand shops from The Fifth Collection and Style Tribute to New2U, A Vintage Tale, or Refash. Designers and brands have also grasped this trend. For example, WoongHung, a Singapore-based jewelry-shop has embraced a 'no-waste' commitment when sourcing their handcrafted pieces by working with artisanal communities from Cebu, Philippines[137].

[133] Fashion Revolution, 'About Singapore, *Fashion Revolution Singapore,* https://www.fashionrevolution.org/asia/singapore/, (accessed 8 December 2020).

[134] Tan, G. 'Why is Sustainability Not Gaining Traction in Singapore?', *T Magazine Singapore,* 23 April 2018, https://tsingapore.com/article/why-fashion-revolution-day-2018-sustainability-not-gaining-traction-singapore, (accessed 8 December 2020).

[135] Heng, M. 'Eco-Friedly Fashion Catches on in Singapore', *The Straits Times,* 6 October 2016, https://www.straitstimes.com/lifestyle/eco-friendly-fashion-catches-on-in-singapore, (Accessed 8 December 2020).

[136] The Fashion Pulpit, *Why Swap?,* 2020, https://www.thefashionpulpit.com, (accessed 8 December 2020)

[137] WoonHung, 'Sustainability', *What Powers WoonHung?,* https://www.woonhung.co/pages/philosophy, (accessed 7 December 2020).

Figure 10. Graphic art from Fashion Pulpit agenda: Why Swap?[138]

Furthermore, given that Singapore is a nation that has embraced the role of innovative economic and technological design to encourage growth, there is no reason why the talent should not also be directed to target sustainable consumption. Indeed, there is potential for defining the country's creative industries with a focus on 'cultural-place making', or in other words, on methods of sustainable production that can make Singapore not only a leader as a hub for design, but a hub for *unique* design[139]. The creative talents and capacities are already there – they merely need encouraging and support. Whilst a lot more remains to be done to nurture these changes in the country, signs of sustainable consumption interests have been steadily emerging.

[138] The Fashion Pulpit, *Why Swap?,* 2020, https://www.thefashionpulpit.com, (accessed 8 December 2020)
[139] Chon, H. 'Plan D: Design and Social Responsibility', *Social Space,* 2019 pp.29-34

4.1.5 LAO PDR

Given the economic reforms implemented towards the end of 1990s in Lao PDR (and the associated industrialization that followed), the manufacturing of garments for export has steadily grown over the past decades[140]. It has been one of the key drivers of expanding manufacturing in the country – however, the relative importance of clothes' production has declined over the recent years, and factory-based producers face immense difficulties in sustaining production due to the increased competitiveness of the world economy.

[140] Nolintha, V. and Jajri, I., 'Garment Industry in Laos: Technical Capabilities, Global Production Chains and Competetiveness, *ERIA Discussion Paper Series*, 2015, p. 1

In fact, the value of garment exports decreased from US$ 219 million to US$ 174 million between 2011-2015[141]. However, new opportunities have emerged, especially from small and medium-sized enterprises that have a significant impact to the country's overall economic growth. They may also provide new avenues for expanding the manufacturing of locally sourced sustainable fashion. In the current sustainability-focused climate, the general decline of manufacturing in large-scale factories does not have to be a concern if the potential of SMEs is adequately tapped.

Investing in sustainably sourced local production and traditional design can offer Lao PDR an unparalleled advantage as a one of the leading fashion exporters in the ASEAN region due to the mounting interest in small-scale sustainable production and unique designs, and investments in livelihood creation have the potential to substantially raise the income for producers and service providers across the country. Furthermore, the existing garment industry can substitute its fibers and fabric with recycled textiles: as of 2015, the imports of new fibers cost US$ 87.5 million for the economy, an amount which could be significantly reduced if the production focus would be on reutilizing low-value, end-of-life clothing as raw material[142]. Furthermore, despite the proliferation of mass-produced textiles, traditional weaving and local artisans have not disappeared. On the contrary, many non-profit organizations have sought to support the growth of fashion-focused SME's by bringing weaving products to the wider markets. The Traditional Arts and Ethnology Centre (TAEC) and Ock Pop Tok (East Meets West) have been focusing on creating economic opportunities and commercializing old traditions for rural artisans by granting small loans and providing training regarding design and business practices[143]. In 2019, Fashion Revolution Laos and Fair Fashion Lao launched their Sustainable Fashion Weekend and Design Competition at the National Cultural Hall, seeking to support designers who focus on sustainable, ethical and culturally unique garments to nurture the green fashion momentum in the country[144]. Similarly, independent designers and boutiques have also invested in this potential. For example, Lao Textiles has operated from Vientiane for over three decades, bringing together rural silk farmers, artisans and craftsmen to produce premium wall hangings, scarves, shawls and custom furnishings, now displayed in galleries across the world. All these initiatives are paving away towards a new future of fashion for Lao, highlighting the potential of emerging markets in leading global change towards a greener, slower and less mass-produced garment industry.

---

[142] UNDP, *Circular Economy Strategies for Lao PDR: A Metabolic Approach to Redefine Resource Efficient and Low Carbon Development,* 2017, p. 50-51

[143] The Asean Post, 'Lao's Art of Weaving', *The Asean Post,* 29 November 2020, https://theaseanpost.com/article/laos-art-weaving, (accessed 11 January 2021)

[144] Fashion Revolution, *Fair Fashion Lao Design Competition,* 2019, https://www.fashionrevolution.org/laos-blog/fairfashionlao/, (accessed 20 January 2021)

4.1.6 MALAYSIA

Despite the challenges to survive in global competition, the Malaysian export-oriented fashion industry has high future innovative potential among ASEAN countries, especially in the regional niche markets[145]. The country continues to attract manufacturing due to improved performance and the adoption of codes of conduct through industrial associations such as the WRAP agreement discussed earlier[146]. Yet, work remains to be done. Current CSR initiatives are not adequate to guarantee compliance to labor laws, decent wages nor enable workers to unionize[147].

---

[145] Crinis, V., Global Commodity Chains in Crisis: The Garment Industry in Malaysia'. *Institutions and Economies,* 4(3), 2012, p. 75-78 pp. 61-82

[146] Crinis, V., 'Sweat or No Sweat: Foreign Workers in the Garment Industry of Malaysia', *Journal of Contemporary Asia,* 40(4), 2010, p. 595

[147] ibid.

@Photo credit: Deva Darshan (Unsplash.com)

Overall, the US$ 44 billion textile industry in the country generates approximately 2 million kilograms of textile waste daily[148]. In terms of consumer behavior, previous research indicates that Malaysians are less likely to engage in green activities, especially in recycling, even though they many are aware of the environmental pollution problems[149].

Yet, drivers of change are emerging among the complicated assemblage of government agencies, producers, retailers, brands and designers, many of whom remain concerned about the socio-political and environmental impacts of the fast fashion industry. For instance, the External Trade Development Corporation has launched the SAVE initiative (Sustainability Action Values for Exporters) to raise awareness and foster the adoption of sustainable practices among Malaysian manufacturers, in efforts to meet the Sustainable Development Goals set for 2030[150]. It also seeks to back up SMEs in attaining new growth and export resilience in the global economy. Such support is invaluable for smaller, local enterprises which hope to enter the emerging sustainable fashion markets. These sentiments have also matured well among designers: Kuala Lumpur Fashion Week 2020 focused on *Design to Sustain*, aligning the campaign with the commitments of the SDGs and the Commonwealth Fashion Council by supporting the production and design of ethical fashion as seen on the runways[151].

Non-profit organisations have also sought to contribute to this momentum. The Yayasan Tuanku Nur Zahirah (YTNZ) foundation intends to assist under-privileged communities and disenfranchised women by reinforcing the skills and livelihoods of songket weavers (traditional Malay handwoven silk or cotton cloths). YTNZ initiatives connect weavers to wider markets, preserve Malay culture and heritage, and have been successful in attracting the attention of brands in the country: collaborative pieces have been produced with designers including Annick Goutal, Anya Hindmarch and Pink Jambu[152]. Aforementioned initiatives exemplify the changing tides of fashion production in Malaysia and provide a glimpse into a brighter future in which the Southeast Asian region can play a role in greening the fashion industry from the bottom-up.

---

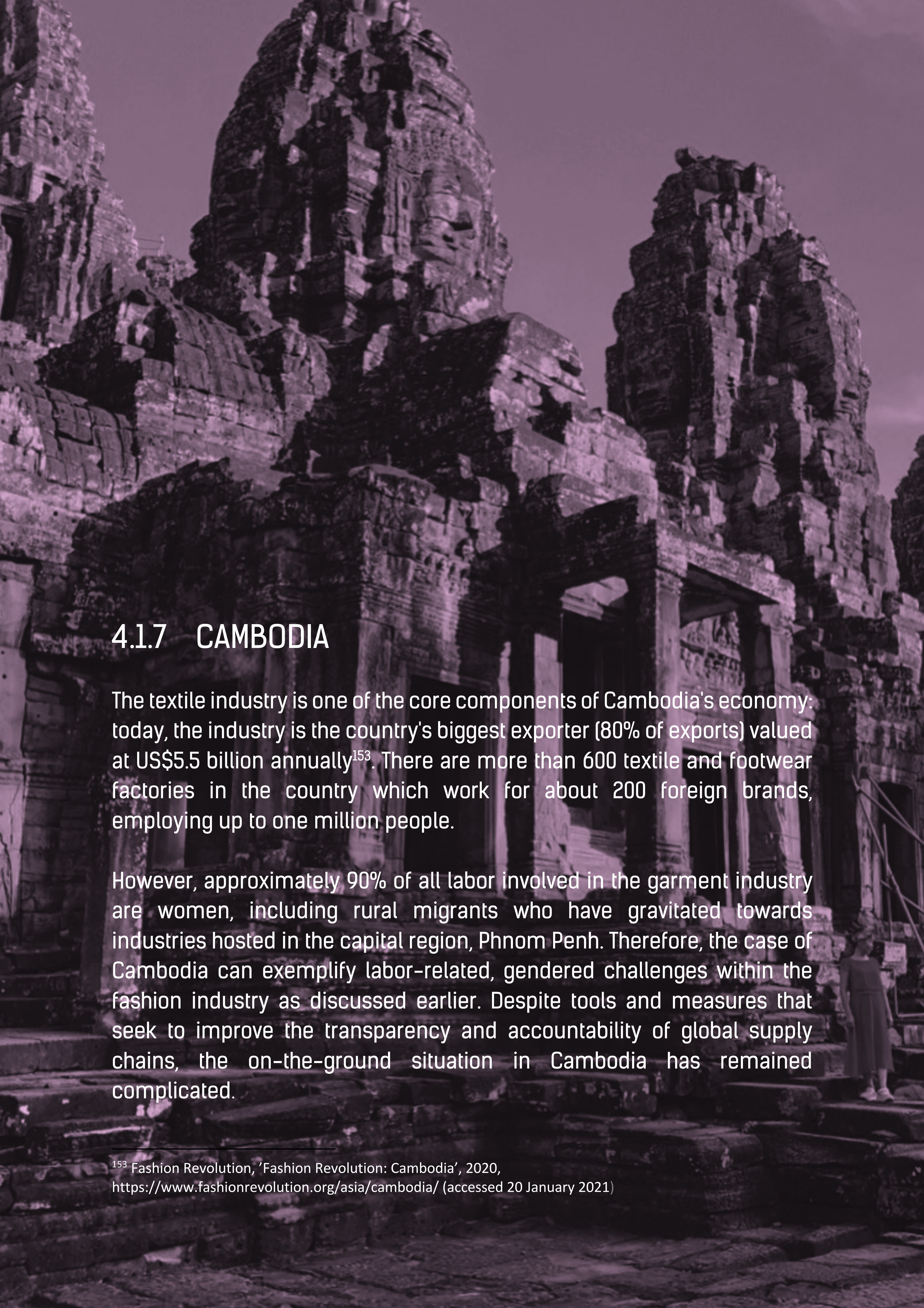
[148] Ali, et al., 'Green Behavior and Financial Performance: Impact on the Malaysian Fashion Industry', *Sage Open,* 2020, p. 3

[149] Yee, L. W., Hassan, S. H., and Ramayah, T., p. 3

[150] Malaysia External Trade Development Corporation, 'MATRADE to Facilitate Malaysia's Transformation as a Sustainable Trading Nation', *The Official Portal,* 2019, https://www.matrade.gov.my/en/about-matrade/media/press-releases/4727-matrade-to-facilitate-malaysia-s-transformation-as-a-sustainable-trading-nation, (accessed 15 January 2021)

[151] KLFW, *Design to Sustain,* 2020, http://klfashionweek.website/design-to-sustain, (accessed 15 January 2021)

[152] Kheng, J. N. S., 'Sustaining the Magnificent Craft of Songket Weaving in Malaysia', *Textile Society of America,* 12th Biennial Symposium, Lincoln, 6-9 October 2010



4.1.7 CAMBODIA

The textile industry is one of the core components of Cambodia's economy: today, the industry is the country's biggest exporter (80% of exports) valued at US$5.5 billion annually[153]. There are more than 600 textile and footwear factories in the country which work for about 200 foreign brands, employing up to one million people.

However, approximately 90% of all labor involved in the garment industry are women, including rural migrants who have gravitated towards industries hosted in the capital region, Phnom Penh. Therefore, the case of Cambodia can exemplify labor-related, gendered challenges within the fashion industry as discussed earlier. Despite tools and measures that seek to improve the transparency and accountability of global supply chains, the on-the-ground situation in Cambodia has remained complicated.

[153] Fashion Revolution, 'Fashion Revolution: Cambodia', 2020, https://www.fashionrevolution.org/asia/cambodia/ (accessed 20 January 2021)

For instance, when the government announced a new minimum wage in December 2013 (US$ 100), between 50,000 to 150,000 garment workers organized a response protest demanding their salaries to be raised further, to levels which would meet their most basic needs. The protest was met with violence by the police and special forces units, resulting in numerous injuries, detentions and deaths of workers employed by factories supplying for international brands including Nike, Abercrombie and Fitch, Adidas, Puma, Uniqlo and others[154]. Somewhat unexpectedly, international brands (from Next to New Look, C&A, H&M and Inditex) intervened in efforts to reach a settlement with the workers during 2014. An agreement between brands and workers' organizations was reached, effectively circumventing the government's wage policy in an unparalleled move to resolve the wage conflicts[155]. Yet, despite the progress, challenges persist.

In 2015, Human Rights Watch continued to reveal discriminatory and exploitative labor conditions in numerous factories across the Phnom Penh metropolitan region. Lack of accountability (partly due to subcontracting), forced overtime, child labor, sexual harassment and discrimination against pregnant workers, short-term contracting, union-busting activities and poor enforcing of existing labor laws were highlighted among the key concerns[156]. For instance, all the unions interviewed in the report stated that as soon as the workers initiated formation procedures, factory management would often pressure and coerce them to resign, and numerous bureaucratic obstacles prevent unionizing (including delayed licensing, prolonged registration and so on). With regards to subcontracting, numerous brands have not disclosed their suppliers publicly, and unauthorized subcontracting proliferates in the absence of protection for whistleblowers (workers or independent unions which would alert supply chain operatives about illicit practices)[157]. Furthermore, even if unauthorized action is revealed, brands may issue stop-production orders as a response, leading to loss of income for factories and workers – therefore constituting a disincentive for reporters.

[154] Worker Rights Consortium, *Crackdown in Cambodia: Workers Seeking Higher Wages Meet Violent Repression,* 24 March 2014, https://www.workersrights.org/wp-content/uploads/2016/02/Crackdown-in-Cambodia-2014-03-low-res.pdf, (accessed 14 January 2021), p. 1-7

[155] Brignall, M., 'Fashion Retailers Agree to Raise Minimum Wage in Cambodia', *The Guardian,* 21 September 2014, https://www.theguardian.com/business/2014/sep/21/fashion-retailers-offer-raise-minimum-wage-cambodia, (accessed 14 January 2021)

[156] Human Rights Watch, 'Work Faster or Get Out: Labor Rights Abuses in Cambodia's Garment Industry', *Human Rights Watch News Release,* 18 March 2015, https://www.hrw.org/report/2015/03/11/work-faster-or-get-out/labor-rights-abuses-cambodias-garment-industry#, (accessed 14 January 2021)

[157] ibid.

However, NGOs and government agencies have stepped in to address issues characterizing the industry and are now driving sustainable change across the country. For instance, Better Factories Cambodia (BFC) was established in 2001 as a partnership between the International Labor Organization and the International Finance Corporation in order to engage with workers, employers and the government to improve working conditions on the ground. BFC seeks to enhance accountability and transparency via producing frequent reports, monitoring subcontracting and so on. With regards to the environment, efforts targeting waste reduction and sustainable production of garments through recycling and innovative design has also advanced rapidly via the consortium of brands, designers, local communities and NGOs.

For example, Mith Samlanh's Home-Based Production Project, launched in 2005, engages with homeless families, seeking to enable participants to afford permanent housing by designing, producing and selling fashion items recycled from waste materials[158]. Similarly, Rajana, The Stung Treng Women's Development Center and the Institute for Khmer Traditional Textiles have established collaborative initiatives with local producers in efforts to revive traditional production methods, to provide peoples with vocational skill trainings and education on the matters of health, management and accounting[159]. Local brands and designers have also responded to the challenges. Designer shop Tonlé has focused on rerouting and reusing materials that would otherwise end up in landfills or incineration. The company has managed to reutilize more than 16,000 kilograms of materials, to reduce nearly half a million kilograms of CO_2 from entering the atmosphere, and to reduce the consumption of nearly 200 million liters of water through their sustainability strategy[160]. Dorsu is another Cambodian manufacturing brand founded on sustainable principles. By utilizing deadstock fabrics for design and production on-site, the company seeks to pave the way towards change in Cambodian manufacturing and global clothing consumption. Ease of wear, longevity of quality and intelligent use of resources characterize their garments, designed to be used across seasons (as opposed to releasing large seasonal collections)[161].

[158] Medvedev, K., 'Designing from Dumpsters: Cambodians Start at Grassroots with Fashion', *Fashion Practice,* 2(2), 2010, p. 234-244

[159] Medvedev, K., 'Cambodian Fashion NGOs: Are They Doing Any Good?', *Journal of Textile Engineering and Fashion Technology,* 1(4), 2017, p. 150

[160] The Asean Post 'Changing Cambodia's fashion industry', *The Asean Post*, 31 January 2020, https://theaseanpost.com/article/changing-cambodias

[161] Dorsu, *About,* 2021, https://dorsu.org/pages/about-us, (accessed 20 February 2021)

4.1.8 MYANMAR

Myanmar's garment industry has a tumultuous history. In the early 21st century, exports witnessed significant growth (exceeding US$ 800 million annually), until trade sanctions imposed by the United States and the European Union crippled production momentarily[162]. Now that the restrictions have been lifted, the sector has increasingly attracted attention from retailers given the momentum associated with the reinforced industrialization goals. The 2015 White Paper by the Myanmar Garment Manufacturers Group outlined goals to increase the number of people employed in the sector to 1.5 million by 2024 and increase the value of the industry to US $ 10 billion[163]. However, high rates of growth tend to have negative side effects, especially to the environment.

[162] BSR, *Child Labor in Myanmar's Garment Sector: Challenges and Recommendations,* BSR Report, San Francisco, 2016, p. 5

[163] MGMA, *Myanmar Garment Industry 10-year Strategy 2015-2024,* 2015 p. 217

@Photo credit: Fuu J (Unsplash.com)

Over-extraction of water and pollution are significant concerns in the stages of garment production and processing in Myanmar, alongside boiler fuels and emissions of factories that sometimes use coal as a cheap fuel source[164]. Moreover, the lack of comprehensive environmental regulations contributes to the on-going environmental degradation arising from the processes of sourcing raw materials, milling, dyeing, manufacturing and packaging[165]. In terms of labor rights, arising issues include discrimination, sexual harassment (in association with the lack of anti-sexual harassment policies) and dangerous working conditions in factories[166].

However, numerous actors from governments, global retailers, brands and local employers have responded to these concerns, and the interest regarding ethical, sustainably sourced and produced fashion is mounting across the country. For instance, SMART Myanmar, a project funded by the European Union intends to raise awareness among European consumers regarding the production situation in Myanmar while promoting cooperation among actors of the value chain in Europe and Myanmar to foster sustainable practices by enhancing collaboration and advocacy. In 2020, the SMART project team also implemented the EU Myan Ku Fund, which is an emergency cash transfer mechanism designed to assist tens of thousands of workers employed by the garment industry, now crippled by the COVID-19 pandemic[167]. Companies such as Virya Myanmar have also entered the sustainable fashion industry in Myanmar by utilising locally sourced, naturally dyed fabrics, and by providing training and support to weavers and local communities[168]. Whilst a lot remains to be done, on-going initiatives provide an insight into the momentum that currently contributes to sustainable change in the emerging fashion industry of Myanmar.

---

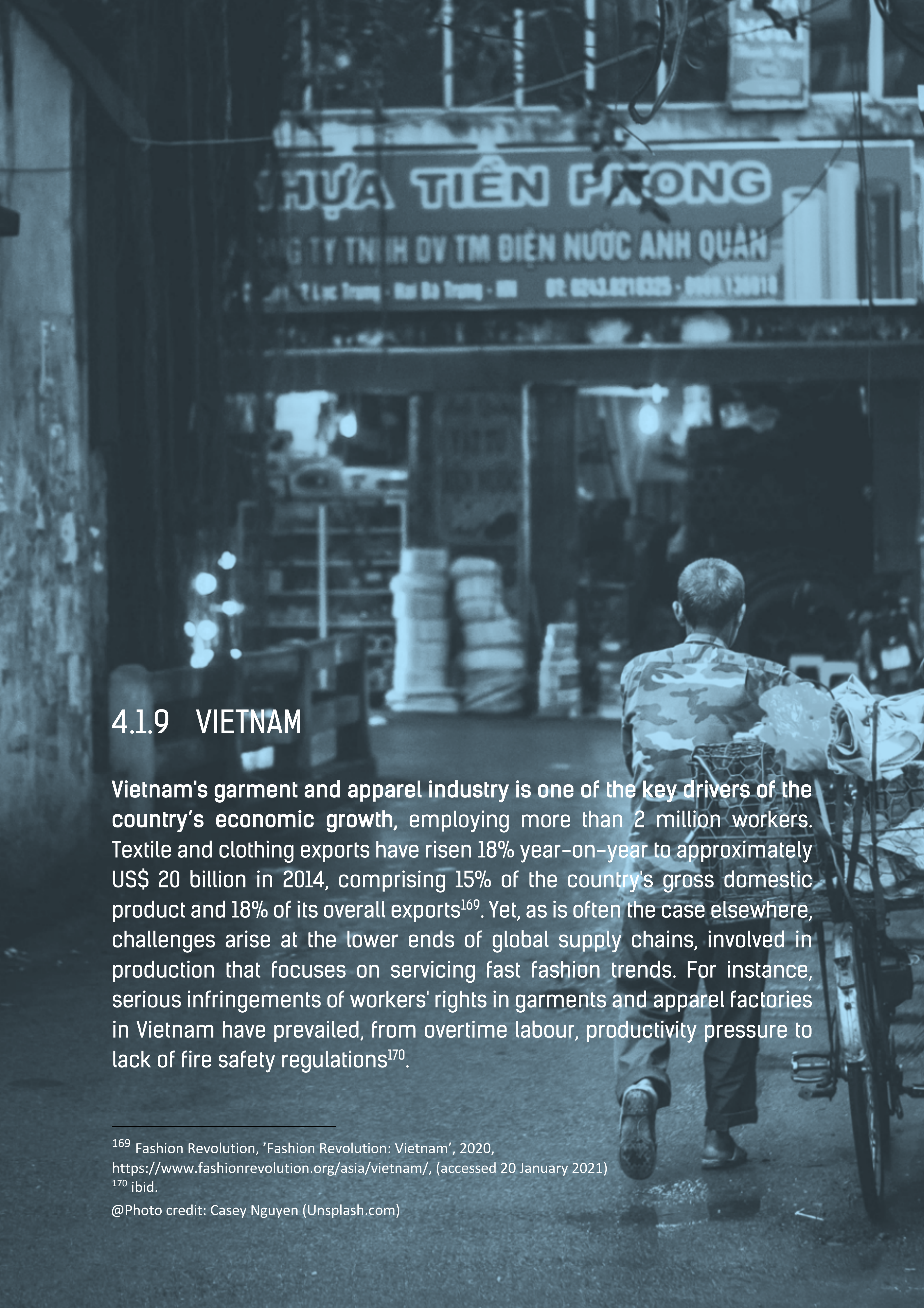
[164] SMART Textile & Garments, *Environmental Impact in the Myanmar Garment Industry*, 2021, https://smartmyanmar.org/en/environmental-impact-in-the-myanmar-garment-industry#slideshow-1, (accessed 15 January 2021)

[165] BSR, *Shaping a Sustainable Garment Sector in Myanmar: Key Opportunities Built on Local Context*, 2014, https://www.bsr.org/reports/BSR_Shaping_Sustainable_Garment_Sector_Myanmar.pdf, (accessed 15 January 2021)

[166] Hogan, L., 'The True Cost of Myanmar's Growing Garment Industry', *The World,* 29 May 2019, https://www.pri.org/stories/2018-05-29/true-cost-myanmars-growing-garment-industry, (accessed 15 Januart 2021)

[167] SMART Textile & Garments, *About SMART,* 2021, https://smartmyanmar.org/en, (accessed 15 January 2021)

[168] Nyein, N., 'Ethical Fashion Empowering Underprivileged Women', *The Irrawaddy,* 3 August 2018, https://www.irrawaddy.com/in-person/profile/ethical-fashion-empowering-underprivileged-women.html, (accessed 16 January 2021)



4.1.9 VIETNAM

Vietnam's garment and apparel industry is one of the key drivers of the country's economic growth, employing more than 2 million workers. Textile and clothing exports have risen 18% year-on-year to approximately US$ 20 billion in 2014, comprising 15% of the country's gross domestic product and 18% of its overall exports[169]. Yet, as is often the case elsewhere, challenges arise at the lower ends of global supply chains, involved in production that focuses on servicing fast fashion trends. For instance, serious infringements of workers' rights in garments and apparel factories in Vietnam have prevailed, from overtime labour, productivity pressure to lack of fire safety regulations[170].

[169] Fashion Revolution, 'Fashion Revolution: Vietnam', 2020, https://www.fashionrevolution.org/asia/vietnam/, (accessed 20 January 2021)
[170] ibid.

@Photo credit: Casey Nguyen (Unsplash.com)

The use of pesticides in the process of cultivating textile fibers contributes to environmental pollution, and most end-of-life garments end up in landfills. Approximately 20% of the water pollution in the country is caused by chemical processing (including dyeing and printing textiles), exacerbated by the lack of standards and enforcement of regulations[171]. However, many operators in the textile manufacturing industry are aware of environmental sustainability concerns, as evidenced by regulations and certifications and the increasing use of sustainable raw materials, which, when combined with sustainable sourcing from retailers, contributes to overall improvements seen in supply chains. Stakeholders have focused on improving workers' welfare, minimum wage, work safety, and gender equity through the provision of maternal leave and protection from sexual harassment[172]. The government has also emphasized sustainable change, as outlined in the Green Growth Strategy. It seeks to promote sustainable consumption and green lifestyles by enhancing the practice of eco-labelling and industry transparency, among other methods that also apply to the textile industry[173]. International Finance Corporation, a member to the World Bank Group, has also contributed to the on-going momentum by establishing the Vietnamese Sustainability Reporting Handbook in efforts to promote transparency in manufacturing.

Whilst progress remains slow and the industries still require significant technical assistance, emerging signs of change provide a reason to remain positive. Alongside the government and civil societies, SMEs have also had an important role in driving sustainable change, partly due to the fact that these niche markets can provide competitive advantages. Whilst limited resources, reliance on external suppliers, lack of customer understanding regarding sustainability, and negative perceptions towards smaller brands continue to limit their growth, proper engagement with existing small-scale retailers and producers encapsulates immense future growth potential towards a more sustainable future[174]. Running sustainable fashion businesses in Vietnam is becoming increasingly attractive as it benefits the environment, enterprises, employees and customers. Yet, whilst the bases have been set, work is to be done to ensure a sustainable future for the Vietnamese fashion industry and, at large, its people and environment.[175]

[171] Hoang, H., 'Vietnam's Fashion and Textile Industries Must Become Sustainable to Survive', *RMIT University,* 23 June 2020, https://www.rmit.edu.vn/news/all-news/2020/june/vietnam-s-fashion-and-textile-industries-must-become-sustainable, (accessed 20 January 2021)

[172] Nayak, R., Akbari, M., and Far, S. M., p. 301

[173] Thong, N.T, et al., 'Chapter 13: Sustainable Consumption and Production in Vietnam', *Sustainable Asia,* P. Schroeder, K. Anggraeni, S. Sartori and U. Weber (eds.), Singapore, World Scientific Publishing, 2017, p. 337

[174] Nayak, et al., 'The Challenges For Sustainability Marketing Approach: An Empirical Study in Vietnamese Fashion SMEs', *International Journal of Trade, Economics and Finance,* 10(4), 2019, p. 106

[175] Ng, M. 'Sustainable Fashion In Vietnam: A Unique Position To Develop', Vietcera, 8 Novemebr 2017. .https://vietcetera.com/en/sustainable-fashion-in-vietnam-a-unique-position-to-develop (accessed 20 January 2021)

5. MARKET SURVEY

Between January and February 2021, Oxford Development Consultancy and Fashion Revolution Singapore conducted a preliminary online market research survey regarding fashion sustainability in Southeast Asia. Of the 256 survey respondents, 85% – or 220 – were from Singapore, while 19, 8 and 9 were from the Philippines, Malaysia and "Others" respectively. Considering the response rate, it was determined that it would be most meaningful to focus the survey insights on Singapore's data set, due to which the following insights apply only to Singapore. The survey's goal was to provide quantitative evidence on the market's demand for fashion sustainability. This goal was decided in consultation with Fashion Revolution Singapore, in efforts to facilitate more productive conversations with prominent local fashion retailers with the help of contextualized and in-depth data.

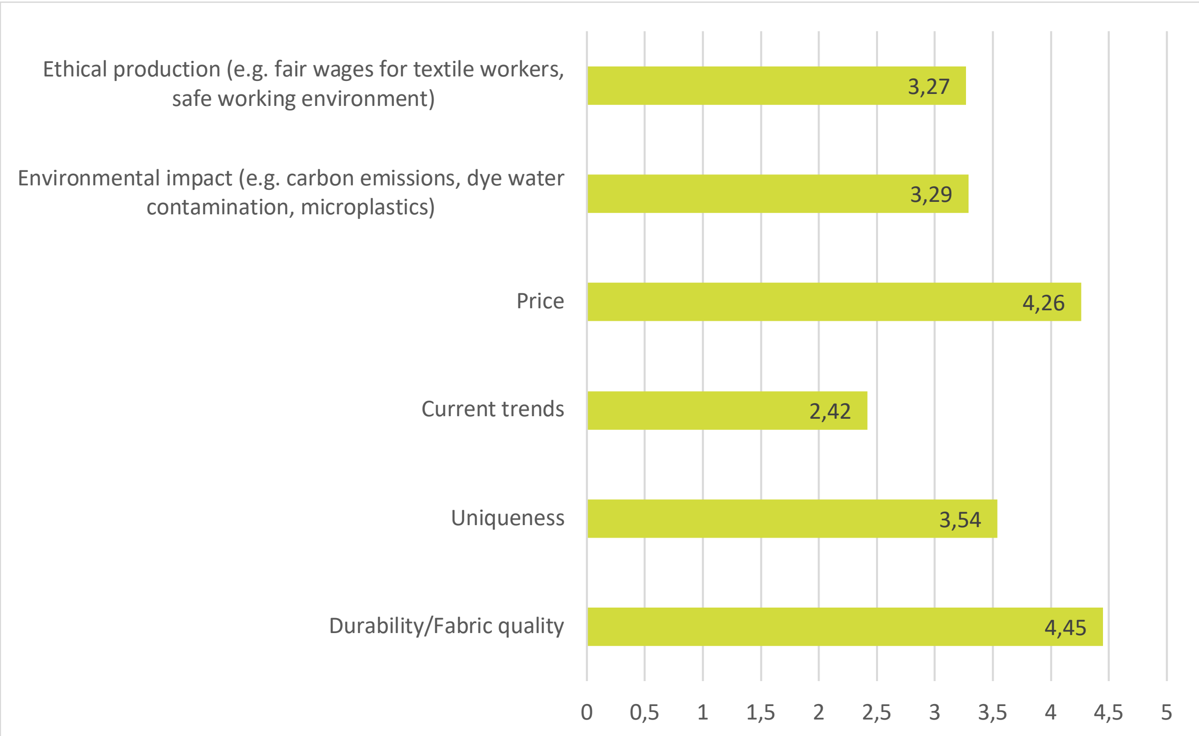


Figure 11. Priorities of Considerations when shopping for fashion products (by checking the label or through other research)

Factors influencing clothes purchases. Figure 11 show that respondents tend to prioritize factors such as price (4.26 out of 5) and durability or fabric quality (4.45 out of 5) when buying clothes. In comparison, sustainability concerns over ethical production and environmental impact rate relatively low (scoring 3.27 and 3.29 out of 5, respectively). However, our results also positively indicate that respondents prioritize environmental concerns over current trends and sometimes uniqueness. Undoubtedly, the demand side's general opinion shows the importance of affordability and fabric quality over sustainability in Singapore.

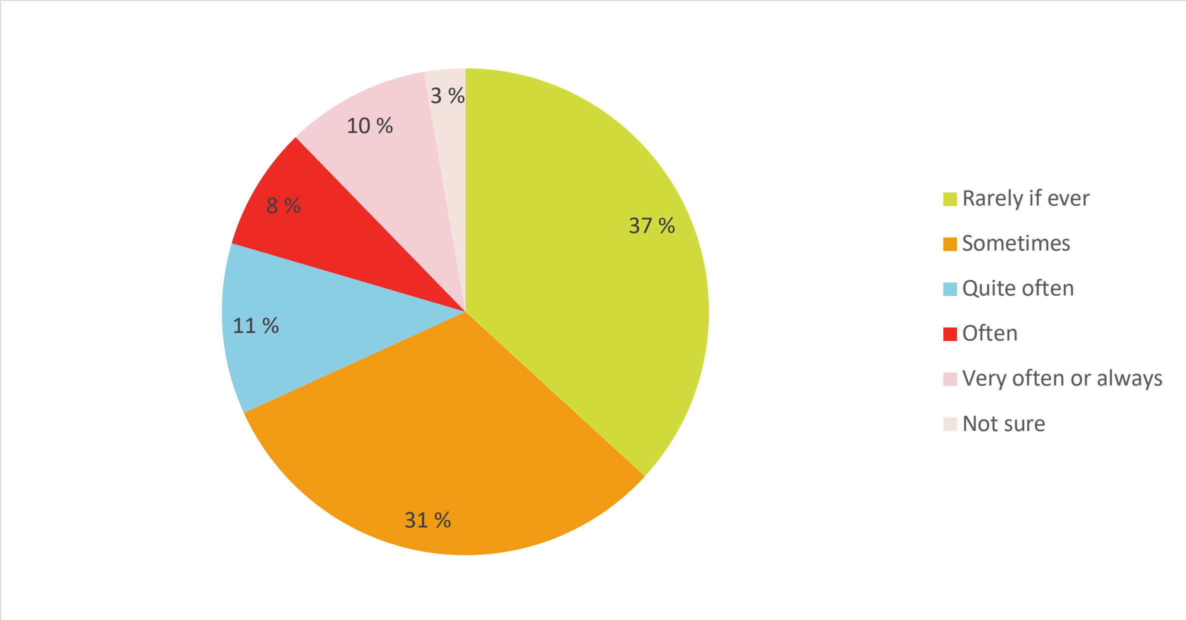


Figure 12: Frequency of researching brand's sustainability before purchasing

Researching brand sustainability. When asked about their frequency of researching a brand's sustainability practices before purchasing, 63% of the respondents share that they actively research before purchasing clothes, as shown in Figure 12. In fact, shows 18% of our respondents often research a brand's sustainability standards before their purchase, which conveys the importance of brands maintaining some degree of environmental consciousness to accommodate the growing environmental awareness on the demand side.

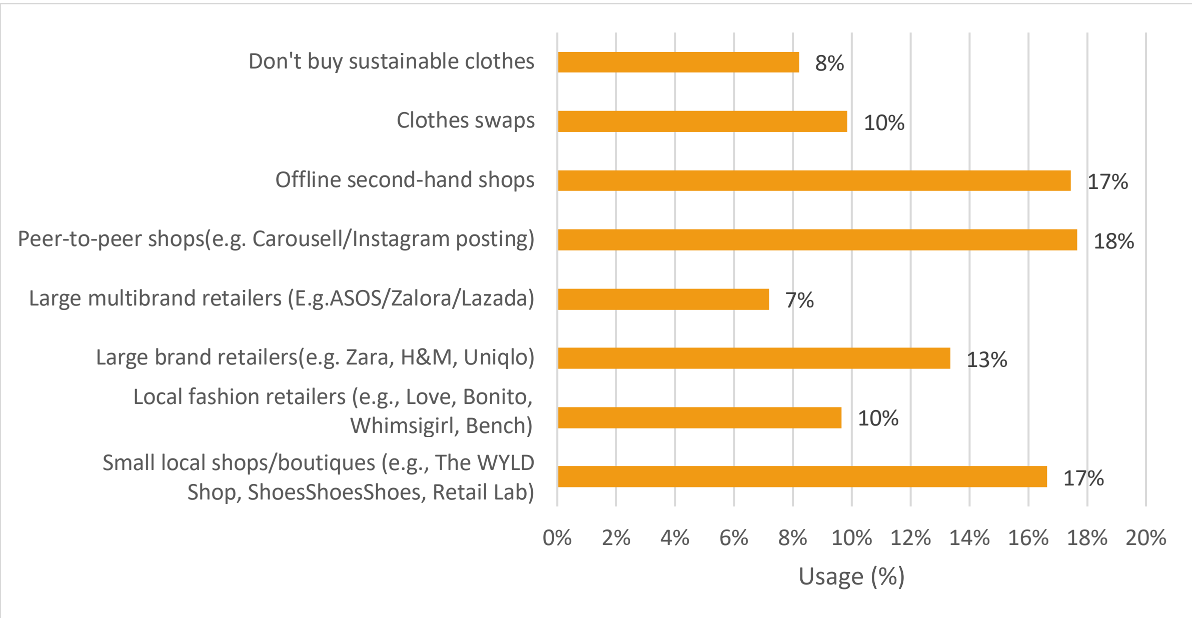


Figure 13. Choice of retailers when buying sustainable clothes

The top 3 places respondents shop for sustainable clothing are peer-to-peer online shops, offline second-hand shops and small local shops or boutiques, as shown in Figure 13. This confirms the rising popularity of both thrifting (shopping second-hand) and supporting small local businesses. Particularly striking was that 17% of our respondents suggest they will choose to shop sustainable clothes in local boutiques, as opposed to 13% of our respondents who will do so in large brand retailers such as Zara and H&M. This indicates the opportunity for boutique shops to take up greater responsibility in curating their selection for a transition towards sustainable fashion.

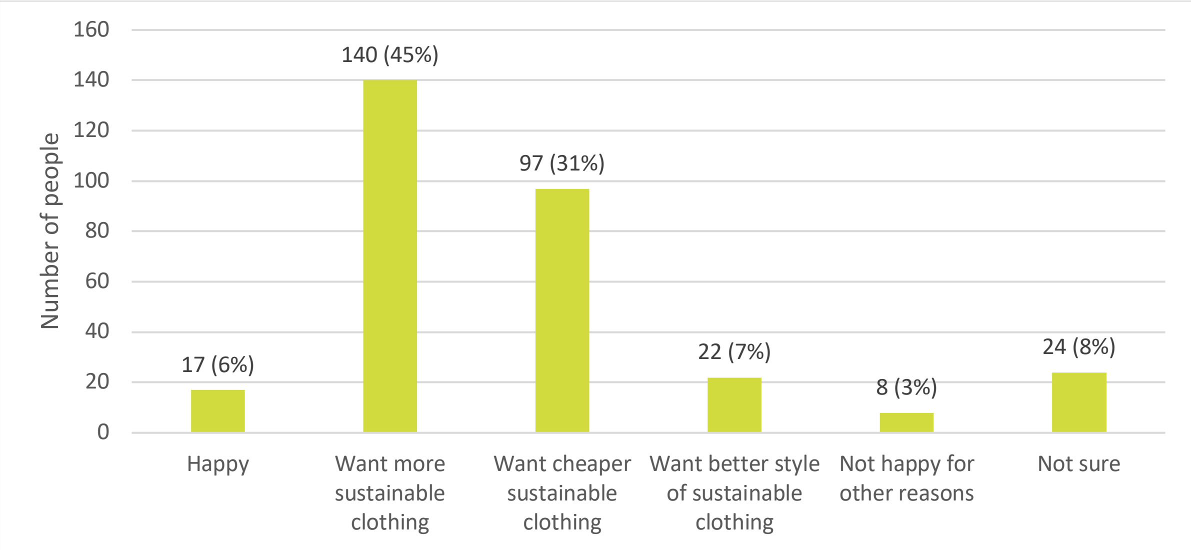


Figure 14a Satisfaction with the sustainable options available (can select multiple), in no.

Desire for more sustainable clothing and willingness to pay a premium. Most respondents suggest the supply of sustainable clothing has not met their needs. Figures 14a suggest most respondents want more and cheaper sustainable clothing (45% and 31%, respectively).

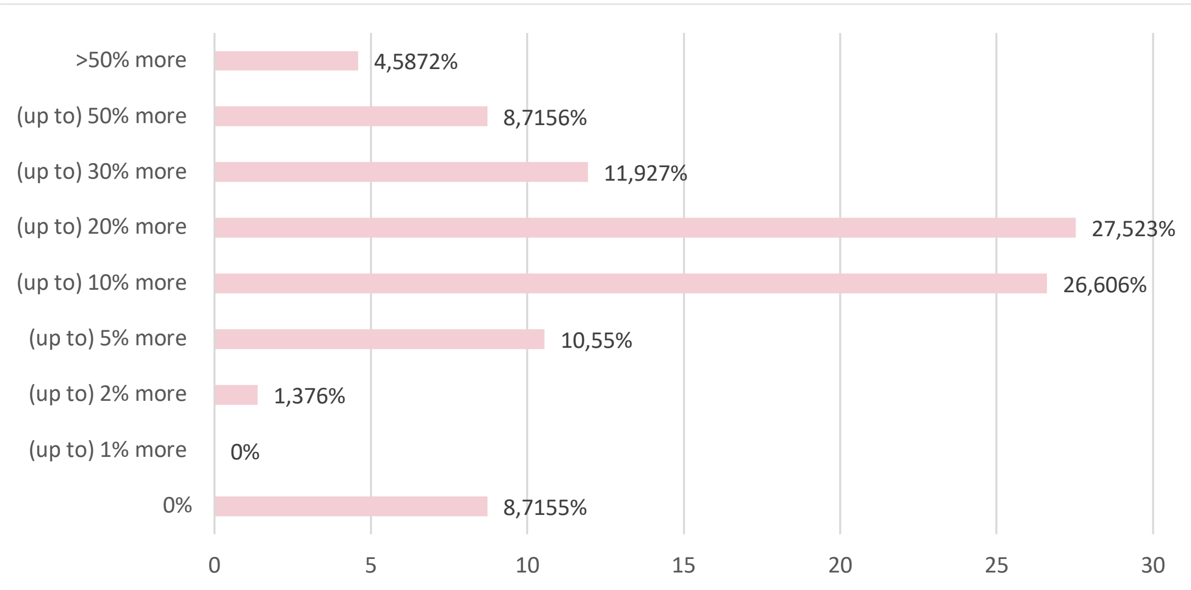


Figure 14b. "How much more would be willing you pay for sustainable options?"

Furthermore, what we found noteworthy in Figure 14b was that 91% of our respondents are willing to pay more to get more sustainable clothing options. More specifically, approximately 50% of the respondents indicate they are willing to pay up to 20%-50% or more for sustainable clothing. These results suggest a significant potential within the sustainable fashion market. While there are clear environmental and ethical reasons for retailers to consider a switch towards sustainable fashion, based on Figure 14b, there is also a profit incentive for this switch to satisfy the current demands. Only a few respondents (6%) indicated they are satisfied with the current sustainable options available (Figure 14a).

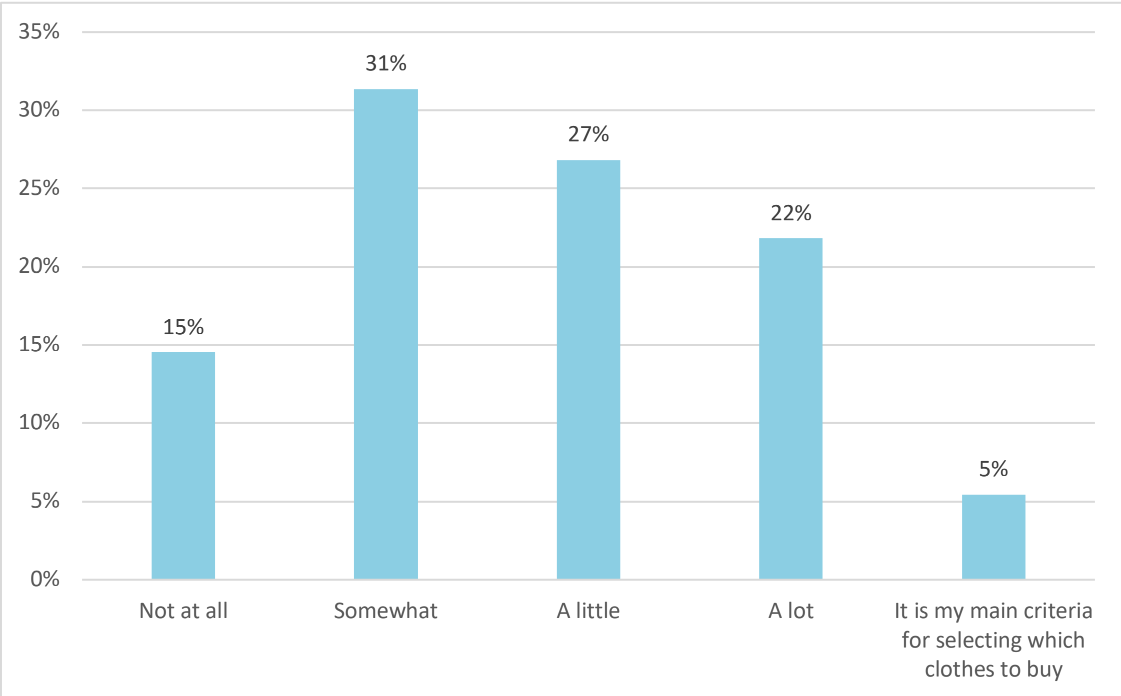


Figure 15: "When purchasing an item of clothing, to what extent do you consider the social or environmental impact prior to deciding whether or not to purchase the item?"

Likewise, 85% of our respondents suggest they will consider the clothing's social or environmental impact before deciding whether or not to purchase them. Figure 15 shows that 22% of respondents consider the socio-environmental impacts of clothing an important factor, and 5% as their main criteria when selecting which clothes to buy. Therefore, there is an incentive for retailers and the fashion market to put a greater emphasis on improving the social and environmental impact of their clothes to accommodate the rising environmental awareness among their customers.

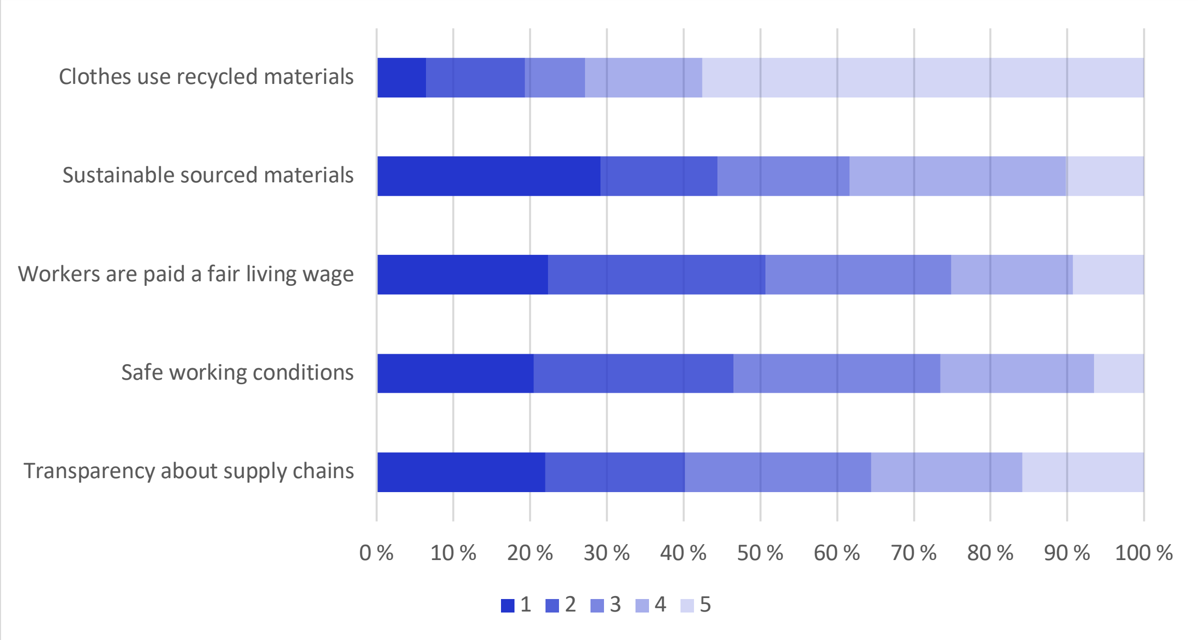


Figure 16: Ranking values in sustainable fashion (1=most important, 5=least important)

The most important sustainability factors. Disaggregating the broad term of 'sustainability', Figure 16 shows respondents' prioritization of five socio-economic features of sustainable fashion. Our respondents emphasize the use of sustainably sourced material. Transparency regarding supply chains, safe working conditions, and fair wages are also among our respondents' essential values when considering sustainable fashion. Figure 16 suggests that 29% of our respondents believe sustainably sourced material is essential in sustainability fashion. 22%, 21% and 20% of the respondents indicate they consider fair wages, supply-side transparency, and safe working conditions crucial in sustainability fashion. The results encourage the use of more sustainably sourced material in the fashion industry, along with greater supply chain transparency, fair wages and safer working conditions. As such, while retailers' sustainability initiatives often focus on environmental sustainability, our findings suggest that they may benefit from giving equal attention to social sustainability.

Figure 17. Proportion of participants that have participated in clothes swaps

Adaptation strategies. Environmentally conscious consumers are finding adaptation strategies for accessing sustainable clothing from other sources than traditional large and small retailers. Figure 13 showed that many respondents get clothes from second-hand shops, as well as through peer-to-peer trading on platforms such as Carousell and Instagram. 60% of participants had also previously participated in a clothes swap (Figure 17).

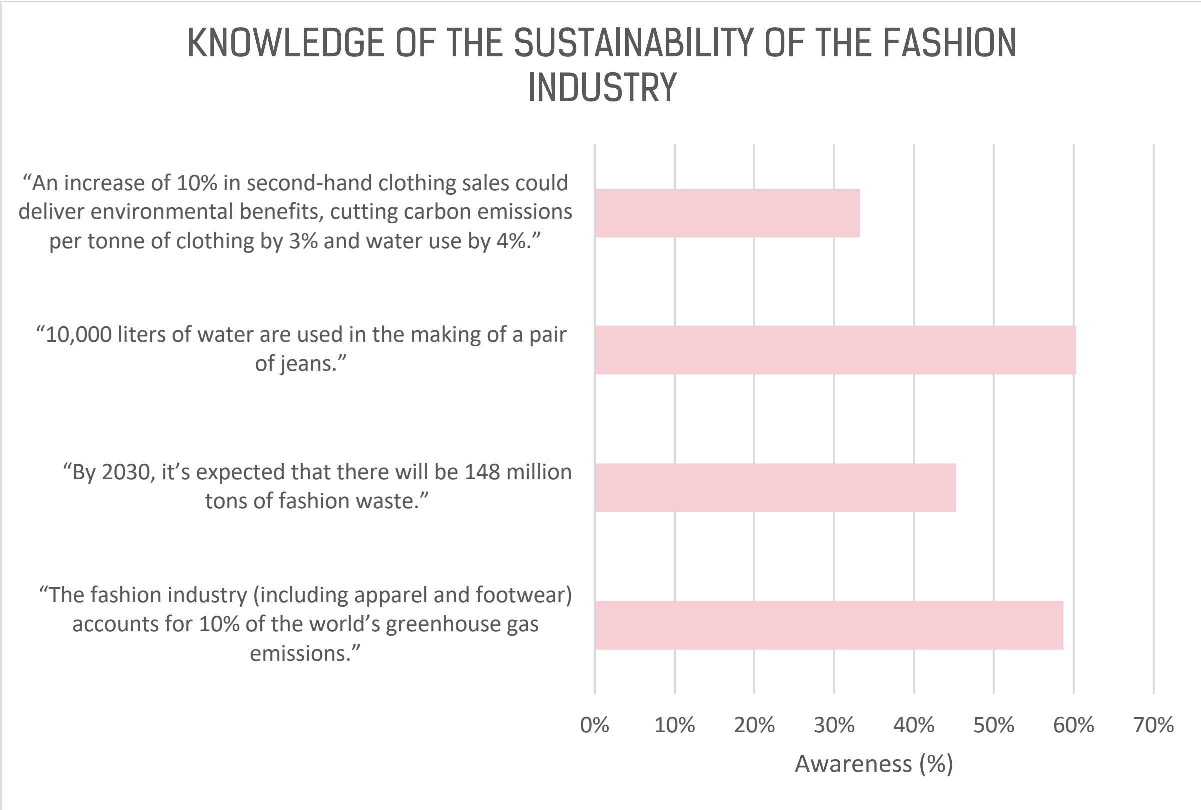


Figure 18: General knowledge of key environmental facts of fashion sustainability among participants

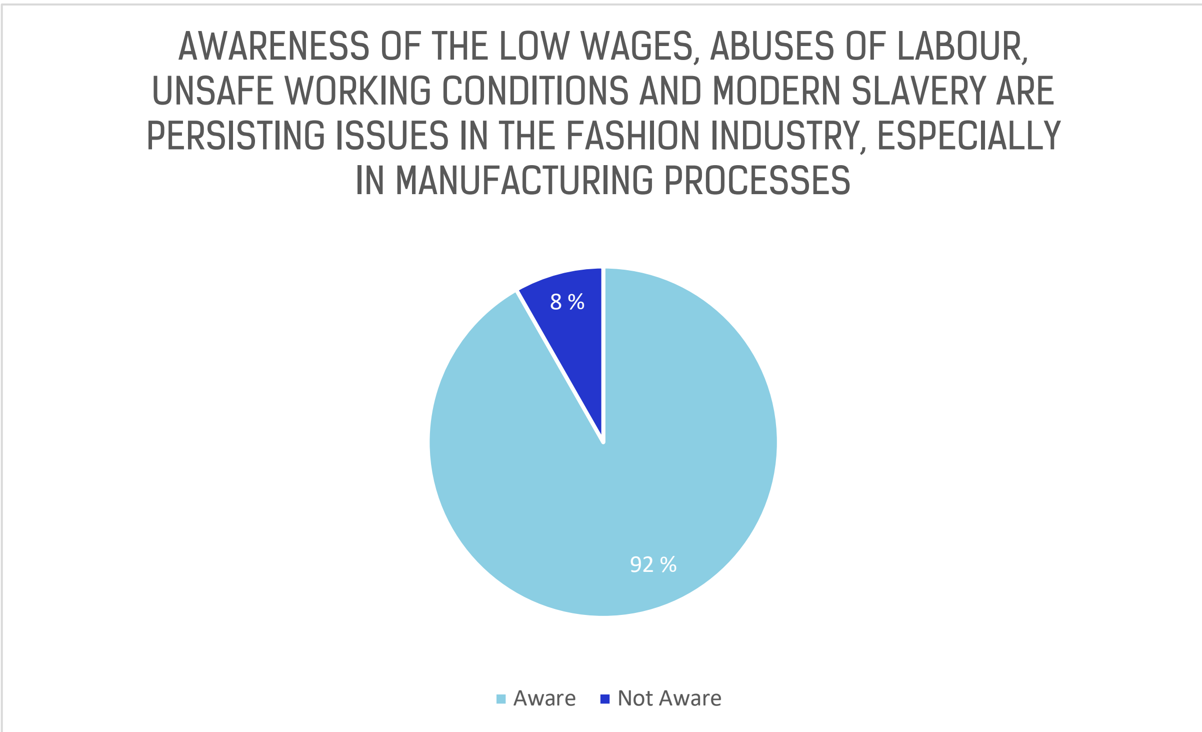


Figure 19: General awareness of labour issues in the fashion industry

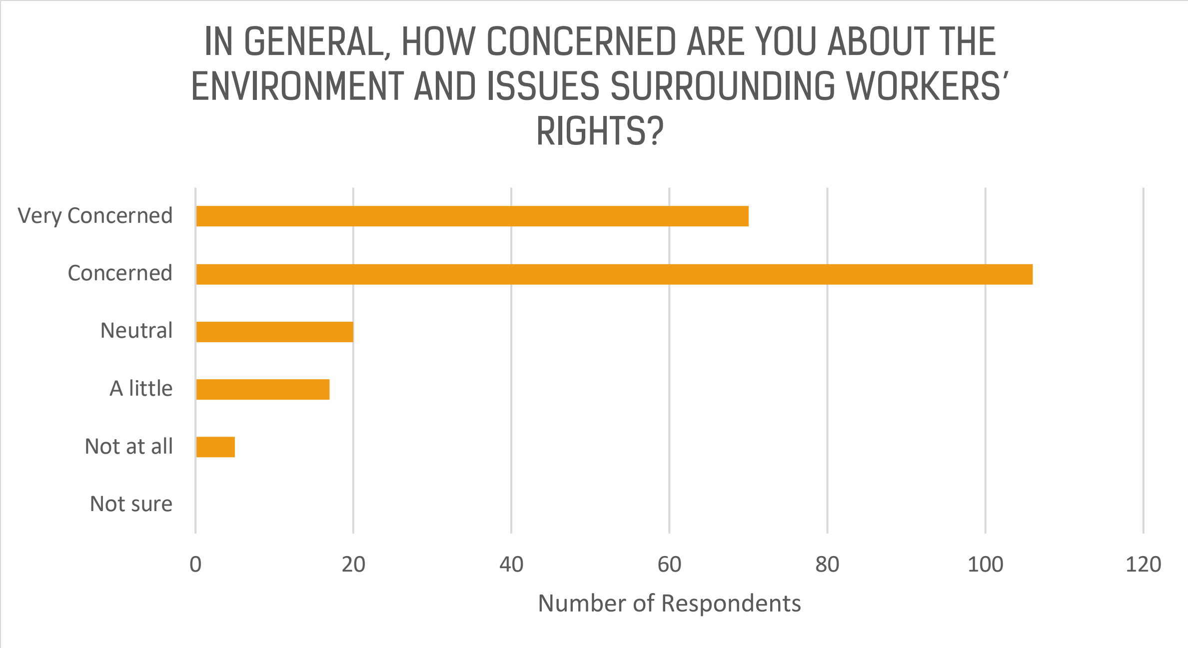


Figure 20: General concern for environmental and workers' rights issues among participants

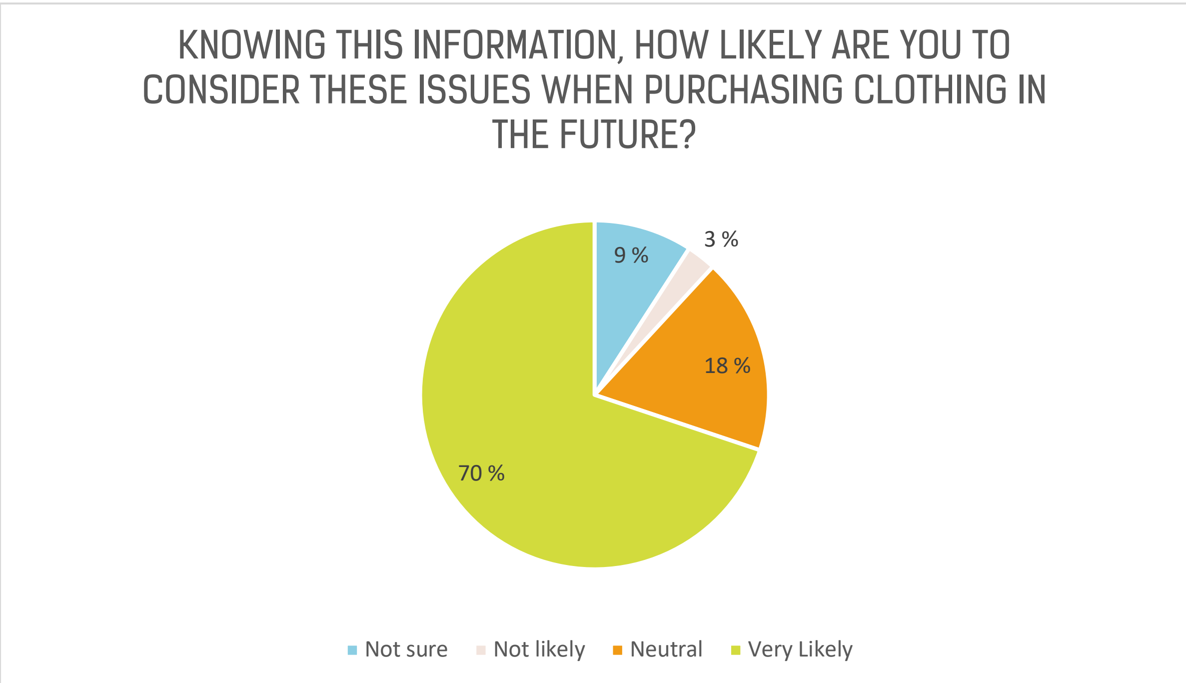


Figure 21: Indication of participants' intention to take the facts in figures 17, 18 and 19 into account going forward

Future behaviour. Surveys like this one are not just a way to extract people's existing opinions on a topic, but also a generative intervention which may stimulate reflection and affect behavioural change. Recognising this, we asked our participants whether learning or being reminded of the key socio-environmental sustainability facts from the questions of Figures 18 and 19 would likely affect how they consider clothing purchases going forward. Summarised in Figure 20, 80% of the participants were concerned or very concerned about these issues, and 70% said they were 'very likely' to consider these facts when making future decisions (figure 21).

6. CHALLENGES AND TRADE-OFFS

Even though this report has sought to highlight and establish positive developments, there is no use in pretending that the future of the industry is not immensely challenging. Problems from complex supply chains – contributing to low pay, unsafe working conditions and abuse of labor – to the increasing consumption largely motivated by cyclical fast fashion trends render the efforts to encourage change a long-term project. However, given the urgency imposed by the climate crisis and increasing rates of environmental destruction, this is an endeavor one must embrace now, for the 'later' is ever growing shorter. Therefore, this section intends to compile the most urgent tasks for NGOs, retailers, producers and customers to focus on to identify best future pathways towards circular clothing economies and slow fashion.

5.1 INSTITUTIONAL RESPONSES

To begin, a wider shift in manufacturing and retailing is required to encourage circular fashion economies. Reuse and upcycling of materials, from scrap waste to used clothing and recycled fibers should be at the core of this change – after all, there is an abundance of existing material ending up into landfills every day. To reduce clothing waste, brands and designers should embrace the possibilities provided by salvaged material, in recognition of the fact that constant new production and processing of textiles remain immensely harmful. Yet, this is not a simple task. Still, millions of people rely on textile industry as their main form of livelihood, thus rendering this predicament a structural issue as well. If one hopes to see change in the wider industry, there is a need to acknowledge the fact that the desire for constant economic growth weighs down the progress of sustainable approaches at the other end, due to fears that slowing down 'progress' could result in loss of employment[176]. Therefore, rather than talking about abolishing the industry, one must focus on nurturing institutional innovations that allow manufacturers to move from energy-consuming and polluting textile production towards recycled, renewable and biodegradable fibers and dyes, combined with low-energy processing techniques[177]. Technology and ability to reinforce these shifts already exists – it is merely a matter of targeting investments. If done correctly, salvaging existing resources currently going to waste could add US$ 4.9 billion to the world economy, and if the industry were to find a mechanism to collect and recycle *all* fibers, the value would rise to nearly US$ 100 billion[178].

---

[176] Ertekin, Z. O. and Atik, D., 'Sustainable Markets: Motivating Factors, Barriers and Remedies for Mobilization of Slow Fashion', *Journal of Macromarketing,* vol. 35, no. 1, 2015, p. 61 (pp. 53-69)
[177] ibid. p. 65
[178] ibid. p. 5

Even though the environmental benefits of the production and consumption shift towards circular fashion may be enormous, social implications of restructuring the fashion industry must be considered[179]. For instance, production communities in lower and middle-income countries could face reduced economic opportunities should the change towards circular fashion occur. As mentioned earlier, shifting from fast fashion could also increase poverty, exacerbate inequalities and the exclusion of economically vulnerable communities (with differentiated impacts for women and marginalized groups, who often face existing inequalities and barriers that lessen their ability to respond to rapid changes in the models of consumption and production)[180]. Therefore, the manufacturers, retailers, governments, NGOs and the academic community should focus on a 'just transition' that seeks understand, mitigate and improve the role of workers so that they are not disproportionately affected by change.

With regards to consumption, change in manufacturing would help in driving down the costs of sustainable fashion. Currently, many sustainable brands remain relatively high-priced and niche products, and thus, are unavailable to consumer classes that are price-conscious. By reconfiguring production, sustainable garments can become the preferred option, and in fact, evidence does suggest that consumers globally would prefer sustainably and ethically produced garments, were they priced same as general fast fashion. Similarly, to increase the popularity and attractiveness of sustainably produced garments, designers and luxury brands should be the first to embrace this shift in interest; after all, the rest of the industry (not to mention consumers) tends to follow their lead. However, given the high turnover of styles, collections and trends driven by the market, it is widely recognized that the industry also needs to slow down to reduce the amount of clothing waste. Supply chains can be slowed down by reducing the number of trends and seasons, and awareness can be raised by brands, designers, NGOs and governments alike to inspire the emerging slow fashion philosophy[181]. This is particularly important in Southeast Asia, so to prevent fast fashion from usurping existing cultural and traditional systems which encourage recycling, clothes swapping or traditional crafts. Indeed, encouraging the consumption of secondhand fashion is also one of the key methods to prolong the lifecycle of clothing. The 'hunt' for secondhand luxury garments, for instance, can be a motivating factor for consumers seeking to find new items, and the respect for an item's quality and heritage may encourage keeping them longer. On the other hand, secondhand consumption is often driven by frugality and bargain hunting, making it an attractive option for consumers who are more concerned about value when making their

[179] BSR, *Taking a People-Centered Approach to a Circular Fashion Economy',* Business for Social Responsibility, September 2020, p. 1-2
[180] ibid.
Ertekin, Z. O. and Atik, 2015

decisions[182]. Similarly, craft practices are important for sustainable growth. By supporting traditional textile handloom products, prevalent in communities across Southeast Asia, there is a possibility for creating locally driven craft industries which can help in the alleviation of poverty in the longer-term. Therefore, we must save space for alternative fashion markets to grow amidst retailers and global corporations.

Yet, as is the case globally, these changes do not happen alone. The markets are driven by profit; as of today, a large portion of it is not interested in societal or environmental benefits unless they translate directly to cash. Therefore, influencing the markets is also a matter of leverage, exercised by NGOs and activist organizations to sustain the momentum of sustainable, ethically sourced fashion. This is particularly important given the entire business model of the fashion industry that has been largely built on the use of fragmented suppliers[183]. Since the 1990s, the practice of outsourcing has proliferated in supply chain management; today, third-party service providers fulfill functions from packaging, labeling, transportation, warehousing and distribution depending on the customers' requirements in the upper chain[184]. These trends are particularly prevalent in Southeast Asia due to the lower costs of labor and production of clothing, thus alienating larger companies and brands from the process of production. Thus, supply chains have become complex and fuzzy, characterized by weak enforcement of labor standards, and the emergence of private governance which do not necessarily have to conform to global standards due to lack of accountability[185].

Moreover, whilst global Corporate Social Responsibility standards and green commitments have become a base-standard in large-scale global supply chains, CSR alone cannot drive meaningful institutional change[186] as discussed in chapter 2.2. For instance, even though Primark offered immediate short-term aid for survivors in the aftermaths of the Rana Plaza disaster, the compensation program and support could not ensure that all workers would receive accident compensation in the future[187]. Hence, accountability initiatives that also leverage the brands and their supply chains through institutionalized frameworks and legal accountability are required to protect workers' rights in the longer term. Indeed, given that brands prioritize maximizing shareholder returns, innovative designs and marketing to boost sales, CSR remains

---

[182] Yang, S., Song, Y. and Tong, S. 'Sustainable Retailing in the Fashion Industry: A Systematic Literature Review', *Sustainability,* vol. 9, 2018, p. 10-11 (pp.1-19)

[183] Moretto, A., et al., 'Designing a Roadmap Towards a Sustainable Supply Chain: A Focus on the Fashion Industry', *Journal of Cleaner Production,* vol. 193, 2018, p. 170 (pp. 169-184)

[184] Nayak, R., Akbari, M. and Far, S. M., 'Recent Sustainable Trends in Vietnam's Fashion Supply Chain', *Journal of Cleaner Production,* vol. 10, 2019, p. 293 (pp. 291-303)

[185] Donaghey, J. and Reinecke, J. 'When Industrial Democracy Meets Corporate Social Responsibility – A Comparison of the Bangladesh Accord and Alliance as Responses to the Rana Plaza Disaster', *British Journal of Industrial Relations,* vol. 56, no. 1, 2018, p.15-16 (pp. 14-42)

[186] Bartley, T. and Egels-Zandén, N. 'Beyond Decoupling: Unions and the Leveraging of Corporate Social Responsibility in Indonesia', *Socio-Economic Review,* vol. 14, no. 2, 2016, p. 250-251. (pp. 231-255).

[187] Donaghey, J. and Reinecke, J. p. 37

largely a moral commitment to be incorporated into the marketing scheme whilst circumventing legal responsibilities[188]. Hence, to leave a lasting legacy, sustainability initiatives addressing supply chains and labor must build a foundation for change through transparency and transnational cooperation which emphasizes legal accountability for retailers and manufacturers. In this context, workers unions, NGOs and INGOs play important roles to leverage corporations into agreements through activism and negotiations to achieve transformative gains in all dimensions of sustainability as was highlighted in chapter 3.2.

Transparency is an important dimension of accountability as well. Consumers, activists, NGOs, and governments alike must be able the monitor the fashion industry's commitments and impacts based on globally recognized and measured performance that is rooted into trackable indices. Without the ability to distinguish true environmental and social benefits of a corporation from mere greenwashing, the industry can continue on its current destructive trajectory. Hence, initiatives such as the Fashion Revolution's Fashion Transparency Index, or the Higg Index remain important benchmarks on monitoring the state of sustainable fashion. In this context, it should be noted that that transparency is likely to increase the consumer's trust towards a brand, and their willingness to buy clothes. Based on a study of the Swedish company Nudie Jeans, the researchers found that the company's supply chain transparency project and associated Production Guide (a global map in which buyers can find the names of all suppliers, general information about them, factory audit summaries, as well as lists of sub-suppliers) influenced consumers positively[189]. Thus, transparency is likely to encourage knowledgeable consumers to increase their spending, making supply chain transparency a useful tool for corporations to not only reinforce their sustainability, but also for increasing revenues.

Ecolabels are another important tool for enforcing transparency and accountability. An eco-label can be described as a voluntary method seeking to improve environmental performance through transparency and certification of practices that are required to uphold sustainable manufacturing standards. However, they can also encourage innovation and leadership in developing new business models and raise consumers' awareness with regards to production of garments they are seeking to buy. Therefore, green branding based on transparency and solid manufacturing strategy adhering to identified goals can be immensely helpful not only in driving positive brand image, but sustainable fashion consumption behavior[190].

---

[188] Bartley, T. and Egels-Zandén, N. p. 235

[189] Egels-Zandén, N. and Sörum, N. 'Supply Chain Transparency as a Consumer or Corporate Tool: The Case of Nudie Jeans Co', *Journal of Consumer Policy*, vol. 39, no. 4, 2015, p. 19-23 (pp. 1-28).

[190] Yang, S., Song, Y. and Tong, S. 'Sustainable Retailing in the Fashion Industry: A Systematic Literature Review', *Sustainability,* vol. 9, 2018, p. 8-9 (pp.1-19)

However, whilst serving as examples of general good practice, these suggestions cannot be considered blanket solutions for everything, particularly in the case of Southeast Asia. Given the sociopolitical and economical diversity of the region, each country, organization and retailer will require their own innovative solutions by modifying practices above to fit realities on the ground. This will require the joint efforts of governments, NGOs, brands, designers, manufacturers and retailers to unite facing the new era of ethically sourced and environmentally sustainable fashion.

5.2 THE CONSCIOUS CONSUMER

Considerable part of this report has been dedicated to addressing structural issues and solutions, from supply chains to governments, non-governmental organizations, retailers and manufacturers. However, one cannot overlook the importance of the individual; the buyers and concerned citizens, navigating the fractured landscape that constitutes the fashion industry today.

Surveys targeting consumer interest have indeed revealed something important: sustainable origins of fashion are often not enough to drive change in buying behavior[191]. Rather, quality and aesthetics seem to dominate decision-making, alongside concerns over price and quality in the context of Southeast Asia earlier. There are a few reasons behind this problem; firstly, consumers in Southeast Asian markets tend to be from emerging middle classes, and tend to have lower purchasing power as opposed to Western buyers. Given that sustainable options are often more expensive vis-à-vis fast fashion choices, they remain niche products on markets crowded by unsustainable alternatives. To respond to this issue, one must look towards existing secondhand initiatives from stores to clothing swaps and grassroot markets. Indeed, given the popularity of secondhand shopping in the Philippines, or the underground night markets of Thailand, not to mention clothes swapping and the proliferation of sustainable innovation driven by designers in Singapore, one hardly needs to reinvent the wheel. In many countries, solutions are already present – they only need to be adequately identified and supported to encourage their mainstreaming.

Secondly, fashion is not only a matter of calculations evaluating price, quality nor sustainability; it is a matter of culture and self-expression. Therefore, the relation between production and consumption becomes a complex, interactive process, which does not always follow economic rationalities. Primarily, fashion is a matter of culture, reflected in the ways with which we assign symbolic value to clothing that we wear, seeking to assimilate to surrounding cultural fields, but also a way to express our

[191] Boston Consulting Group, *The Pulse of the Fashion Industry: 2019 Update,* 2019, p. 1

perceptions of ourselves[192]. The methods that one chooses to express one's cultural surroundings, socioeconomic status (or, aspired status), current trends and imaginaries of social media are all reflected in fashion. Hence, it should be discussed and studied as a social phenomenon, as opposed to treating garments as a matter of consumer rationalities. This is particularly true given evidence of sustainable consumerism discussed previously, which revealed how individuals construct their own fuzzy models of sustainability to navigate the complex landscape of the fashion industry, characterized by information, misinformation, lack of transparency and competing corporate interests, all clashing against one another. Moreover, when such problems are combined with the complexities sustainable fashion consumers face, simplistic efforts targeting recycling or fabric selection in consumer engagement are likely to fall short, inspiring only limited commitment[193]. In other words, fashion mirrors the social field it remains embedded in, and thus, is equally complex to understand.

Here, a question arises; how, then, can sustainable consumer behavior be mainstreamed at the individual level? One of the most effective ways to raise awareness and influence consumers would be to focus on education. Given how closely clothes are associated to our everyday lives, integrating sustainable fashion into curricula (as part of the wider efforts seeking to integrate sustainability) would provide a tangible example for students to grasp, especially at the lower levels of education. Seeing one's personal impacts to the world through the lens of clothing could provide a new avenue for transforming sustainability from a niche industry to a majority one. Education is also important given the proliferation of misinformation and greenwashing. To navigate this fractured landscape of profit-driven corporations seeking to influence the consumer, individuals themselves must have the capacity to assess whether or not companies are performing as well in reality as they advocate through marketing[194]. Therefore, education is one of the first and foremost methods to encourage changes in the fashion industry, alongside more transparent communication from retailers which highlights sustainability that is approachable and enjoyable to the buyer[195].

Reputable brands can also influence and educate the customers, assuming that they are enforcing transparency of their initiatives and supply chains. Indeed, emotional appeal and storytelling approaches regarding sustainable production (when combined with actual data) could increase a customer's engagement with the brand[196], and

---

[192] Crane, D. and Bovone, L. 'Approaches to Material Culture: The Sociology of Fashion and Clothing', *Poetics,* vol. 34, no. 6, 2006, pp. 319-333

[193] Bly,, S., Gwozdz, W. and Reisch, L. A., p. 133

[194] Kusá, A. and Urmínová, M. ''Communication as a Part of Identity of Sustainable Subjects in Fashion', *Journal of Risk and Financial Management,* vol. 13, no. 305, 2020, p. 8 (pp. 1-16).

[195] ibid. p. 9-10

[196] Amritha, B. And Suresh, K., 'Sustainability is the New Black: Exploring Website Communication Practices of Indian Sustainable Fashion Brands', *Fashion Style & Popular Culture,* vol. 7, no. 4, 2020, pp. 539-558

increase their knowledge of the state of the wider industry. On the other hand, awareness can be raised through unconventional means; from art installations used by Redress to public protests and online campaigns, sustainable fashion can gain traction from initiatives driven by NGOs and people themselves. Therefore, one must keep an eye out for the grassroots as well – revolutions occur everywhere, even if in microscale. Such momentum can promote reforms in the fashion industry; this has been witnessed over history in the case of underground movements from hippies to punks and, paradoxically, anti-fashion movements that can become fashionable on their own[197]. Given the magnitude of global issues with regards to the climate crisis and social injustices, there is no reason why one should not consider sustainable fashion as one of the largest trend-shifts ever to occur in the fashion industry – a shift it must embrace if it hopes to survive.

[197] Ertekin, Z. O. and Atik, D., 'Sustainable Markets: Motivating Factors, Barriers and Remedies for Mobilization of Slow Fashion', *Journal of Macromarketing,* vol. 35, no. 1, 2015, p. 54-55 (pp. 53-69)

7. REFERENCES & WORKS CITED

Aji, H. M. and Sutikno, B. 'The Extended Consequence of Greenwashing: Perceived Consumer Skepticism', *International Journal of Business and Information,* vol. 10, no. 4, 2015, pp. 434-468.

Ali, Q., Salman, A., Parveen, S., and Zaini, Z., 'Green Behavior and Financial Performance: Impact on the Malaysian Fashion Industry', *SAGE Open,* 2020, pp. 1-14

Amandari, A. S. and Wirengjurit, E. 'Fashion, but Make it Sustainable, '*Manual,* 28 August 2019, https://manual.co.id/article/sustainable-fashion-indonesia/, (accessed 14 December 2020)

Amritha, B. And Suresh, K., 'Sustainability is the New Black: Exploring Website Communication Practices of Indian Sustainable Fashion Brands', *Fashion Style & Popular Culture,* vol. 7, no. 4, 2020, pp. 539-558

APPG, *APPG Executive Summary 2020: Making the UK a Global Leader in Sustainable Fashion,* London, 2020

Arvidsson, A. and Niessen, B., 'Creative Mass. Consumption, Creativity and Innovation on Bangkok's Fashion Markets', *Consumption Markets and Culture,* vol. 18, no. 2, 2015, pp. 111-132.

Austin, K. G., Schwantes, A., Gu, Y. and Kasibhatla, P. S., 'What Causes Deforestation in Indonesia?', *Environmental Research Letters,* vol. 14, no. 2, 2019, pp. 1-9

Baptist World Aid, *The 2019 Ethical Fashion Report: The Truth Behind the Barcode,* North Ryde, Australia, 2019

Bartley, T. and Egels-Zandén, N. 'Beyond Decoupling: Unions and the Leveraging of Corporate Social Responsibility in Indonesia', *Socio-Economic Review,* vol. 14, no. 2, 2016, pp. 231-255

Barrie, L., 'Germany Agrees New Law on Supply Chain Due Diligence', *Just Style,* 19 February 2021, https://www.just-style.com/news/germany-agrees-new-law-on-supply-chain-due-diligence_id140784.aspx, (accessed 20 February 2021)

Beaton, H. 'The Future of Sustainable Fashion: COVID-19 Update', *Luxiders,* 2020, https://luxiders.com/the-future-of-sustainable-fashion-covid-19/, (accessed 17 December 2020)

Biana, T. H., 'The Philippine *Ukay-Ukay* Culture as Sustainable Fashion, *Business and Economics Review,* vol. 30, no. 1, 2020, pp. 154-164

Bianchi, F., Dupreelle, P., Krueger, F., Seara, J., Watten, D. and Willersdorf, S., 'Fashion's Big Reset', *Boston Consulting Group,* 1 June 2020, https://www.bcg.com/publications/2020/fashion-industry-reset-covid, (accessed 17 December 2020)

Bly, S., Gwozdz, W. and Reisch, L. A., 'Exit from the High Street: An Exploratory Study of Sustainable Fashion Consumption Pioneers', *International Journal of Consumer Studies,* vol 39, 2015, pp. 125-136

Boston Consulting Group, Sustainable Apparel Coalition and Higg Co, *Weaving a Better Future: Rebuilding a More Sustainable Fashion Industry after COVID-19,* Amsterdam, 2020

Boston Consulting Group, *The Pulse of the Fashion Industry: 2019 Update,* 2019

Brignall, M., 'Fashion Retailers Agree to Raise Minimum Wage in Cambodia', *The Guardian,* 21 September 2014, https://www.theguardian.com/business/2014/sep/21/fashion-retailers-offer-raise-minimum-wage-cambodia, (accessed 14 January 2021)

Brock-Nielsen, S., ‘Retailers and the Rising Trend of Sustainability: What Marketers Need to Know, *Sprout Social: Social Media Trends,* 21 April 2020, https://sproutsocial.com/insights/retail-social-sustainability-trend/, (accessed 17 December 2020)

BSR, *Child Labor in Myanmar’s Garment Sector: Challenges and Recommendations,* Business for Social Responsibility Report, San Francisco, 2016

BSR, *Taking a People-Centered Approach to a Circular Fashion Economy’,* Business for Social Responsibility Report, September 2020

BSR, *Shaping a Sustainable Garment Sector in Myanmar: Key Opportunities Built on Local Context*, 2014, https://www.bsr.org/reports/BSR_Shaping_Sustainable_Garment_Sector_Myanmar.pdf, (accessed 15 January 2021)

Bueno, A., ’How This Government Facility is Saving Philippine Textiles’, *CNN Philippines,* 22 December 2018, https://www.cnnphilippines.com/life/style/2018/12/5/Philippine-Textile-Research-Institute.html, (accessed 10 January 2021)

Business of Fashion and McKinsey & Company, *The State of Fashion 2021,* New York, 2020

Business of Fashion and McKinsey & Company, *The State of Fashion 2020,* New York, 2019

Business Research Company, ‘Sustainable Fashion Market Analysis Shows the Market Progress in Attempt to Decrease Pollution in the Global Ethical Fashion Market 2020, *Global Newswire,* 28 October 2020, https://www.globenewswire.com/news-release/2020/10/28/2116073/0/en/Sustainable-Fashion-Market-Analysis-Shows-The-Market-Progress-In-Attempt-To-Decrease-Pollution-In-The-Global-Ethicalfashion-Market-2020.html, (accessed 10 December 2020)

Business Research Company, ‘Sustainable Fashion Market Analysis Shows the Market Progress in Attempt to Decrease Pollution in the Global Ethical Fashion Market 2020, *Global Newswire,* 28 October 2020, https://www.globenewswire.com/news-release/2020/10/28/2116073/0/en/Sustainable-Fashion-Market-Analysis-Shows-The-Market-Progress-In-Attempt-To-Decrease-Pollution-In-The-Global-Ethicalfashion-Market-2020.html, (accessed 10 December 2020)

Cahiles-Magkilat, B., ’BOI To Promote Sustainable Fashion’, *Manila Bulletin,* 21 November 2019, https://mb.com.ph/2019/11/21/boi-to-promote-sustainable-fashion/, (accessed 10 January 2020)

Capgemini Research Institute, *Consumer Products and Retail: How Sustainability is Fundamentally Changing Consumer Preferences,* Paris, 2020

CARE International, *Made by Women: Impact Report 2019,* Geneva, 2019

Chatikavanij, K. ‘6 Simple Ways to Shop Sustainable Fashion in Bangkok’, *Lifestyle Asia,* 26 October 2019, https://www.lifestyleasia.com/bk/style/fashion/6-simple-ways-shop-sustainable-fashion-bangkok/, (accessed 16 December 2020)

Chon, H. ‘Plan D: Design and Social Responsibility’, *Social Space,* 2019 pp.29-34

Clean Clothes Campaign, *Migrant Workers in Thailand’s Garment Factories,* Amsterdam, 2014

Clean Clothes Campaing, *Tailored Wages 2019: The State of Pay in the Global Garment Industry,* 2019
CNBC in Fiarani, R. ’Indonesian Market Insight for Global Fashion Companies’, *Medium,* 2019, https://medium.com/with-bright-indonesia/indonesian-market-insight-for-global-fashion-companies-61b34b06a873, (accessed 13 December 2020)

Crane, D. and Bovone, L. ‘Approaches to Material Culture: The Sociology of Fashion and Clothing’, *Poetics,* vol. 34, no. 6, 2006, pp. 319-333

Crinis, V., Global Commodity Chains in Crisis: The Garment Industry in Malaysia'. *Institutions and Economies,* 4(3), 2012, pp. 61-82

Crinis, V., 'Sweat or No Sweat: Foreign Workers in the Garment Industry of Malaysia', *Journal of Contemporary Asia,* 40(4), 2010, pp. 589-611

DBS, 'Singaporeans Open to Sustainable Fashion but Won't Pay More: DBS Survey', *DBS Media,* https://www.dbs.com/newsroom/Singaporeans_open_to_sustainable_fashion_but_wont_pay_more__DBS_survey, (accessed 11 December 2020)

de León, 'Fashion Designers Benefit Communities in Philippines with Indigenous Textiles', *The Guardian,* 4 March 2014, https://www.theguardian.com/sustainable-business/sustainable-fashion-blog/fashion-design-philippines-textile-innovation, (accessed 10 January 2020).

Dezeen, 'Thailand's Government Launches Thai Style Solutions Campaign to Showcase Country's Creatives', *Dezeen,* 21 October 2020, https://www.dezeen.com/2020/10/21/thai-style-solutions-thailand-products/, (accessed 15 December 2020)

Donaghey, J. and Reinecke, J. 'When Industrial Democracy Meets Corporate Social Responsibility – A Comparison of the Bangladesh Accord and Alliance as Responses to the Rana Plaza Disaster', *British Journal of Industrial Relations,* vol. 56, no. 1, 2018, pp. 14-42

Dorsu, *About,* 2021, https://dorsu.org/pages/about-us, (accessed 20 February 2021)

Egels-Zandén, N. and Sörum, N. 'Supply Chain Transparency as a Consumer or Corporate Tool: The Case of Nudie Jeans Co', *Journal of Consumer Policy*, vol. 39, no. 4, 2015, pp. 1-28

Eileen Fisher, 'Values', *Behind the Label,* 2020, https://www.eileenfisher.com/circular-by-design, (accessed 15 December 2020)

Eileen Fisher, *Horizon 2030: What if We Did Things Differently?',* 2021, https://www.eileenfisher.com/horizon2030, (accessed 20 January 2021)

Ellen MacArthur Foundation, *A New Textiles Economy: Redesigning Fashion's Future,* Cowes, 2017
Ellen McArthur Foundation, *What is the Circular Economy?,* 2020, https://www.ellenmacarthurfoundation.org/circular-economy/what-is-the-circular-economy, (accessed 17 December 2020)

Ertekin, Z. O. and Atik, D., 'Sustainable Markets: Motivating Factors, Barriers and Remedies for Mobilization of Slow Fashion', *Journal of Macromarketing,* vol. 35, no. 1, 2015, pp. 53-69

European Clothing Action Plan, 'Life ECAP: European Sustainable Clothing Action Plan'*, Project LIFE14 ENV/UK/000257,* 2015
Fair Wear Foundation, *Indonesia Country Study: Wage Update 2019,* Jakarta, 2018

Farag, H., Hansell, G., Chau, V. and Beal, D. 'ESG Commitments are Here to Stay', *Boston Consulting Group,* 23 June 2020, https://www.bcg.com/publications/2020/esg-commitments-are-here-to-stay, (accessed 17 December 2020)

Farra, E., 'Extinction Rebellion's Youth Group Protested New York Fashion Week with "100% Sustainable" Guerrilla Shows', *Vogue,* 11 February 2020, https://www.vogue.com/slideshow/extinction-rebellion-youth-new-york-fashion-week-protests, (accessed 16 December 2020)

Fashion Revolution, 'Fashion Revolution: Cambodia', 2020, https://www.fashionrevolution.org/asia/cambodia/ (accessed 20 January 2021)

Fashion Revolution, ’About Singapore, *Fashion Revolution Singapore,* https://www.fashionrevolution.org/asia/singapore/, (accessed 8 December 2020)

Fashion Revolution, ’Fashion Revolution; Laos’, 2020, https://www.fashionrevolution.org/asia/laos/, (accessed 10 December 2020)

Fashion Revolution, ’Fashion Revolution: Cambodia’, 2020, https://www.fashionrevolution.org/asia/cambodia/ (accessed 10 December 2020)

Fashion Revolution, ’Fashion Revolution: Vietnam’, 2020, https://www.fashionrevolution.org/asia/vietnam/, (accessed 10 December 2020)

Fashion Revolution, *Fashion Revolution White Paper,* London, 2020

Fashion Revolution, *Fashion Transparency Index: 2020 Edition,* 2020

Fashion Revolution, We Are Fashion Revolution, 2020, https://www.fashionrevolution.org, (accessed 17 December 2020)

Fashion Revolution, *Fair Fashion Lao Design Competition,* 2019, https://www.fashionrevolution.org/laos-blog/fairfashionlao/, (accessed 20 January 2021)

Fashion Revolution Philippines, *The Impact of the Importation of Second-hand Clothing in the Philippines,* Fashion Revolution, 2019, p. 8-9

Gita, S., Hussan, A. and Choudhury, T. G. ’Impact of Textile Dyes Waste on Aquatic Environments and its Treatment’ *Environment and Ecology,* vol. 35, no. 3c, 2017, pp. 2349-2353

Global Fashion Agenda, *2020 Circular Fashion System Commitment: 2018 Status Report,* Copenhagen, 2018

Glover, S. ’Consumers Want Sustainability Post Lockdown’, *Ecotextile,* 10 August 2020, https://www.ecotextile.com/2020081026509/fashion-retail-news/consumers-want-sustainability-post-covid-20.html, (accessed 17 December 2020)

Granskog, A., Lee, L., Magnus, K-H. and Sawers, C., ‘Survey: Consumer Sentiment on Sustainability in Fashion’, *McKinsey & Company: Retail Survey,* 17 July 2020, https://www.mckinsey.com/industries/retail/our-insights/survey-consumer-sentiment-on-sustainability-in-fashion, (accessed 18 December 2020)

Gray, S., *Progress Report: Sustainable Clothing Action Plan 2020 Commitment – Progress Against Footprint Reduction Targets 2012-2017,* WRAP, 2018

Gurova, O. and Morozova, D. ‘Critical Approach to Sustainable Fashion: Practices of Clothing Designers in the Kallio Neighborhood of Helsinki’, *Journal of Consumer Culture,* vol. 18, no. 3, 2018, pp.397-413

Heng, M. ’Eco-Friedly Fashion Catches on in Singapore’, *The Straits Times,* 6 October 2016, https://www.straitstimes.com/lifestyle/eco-friendly-fashion-catches-on-in-singapore, (Accessed 8 December 2020)

Hoang, H., ’Vietnam’s Fashion and Textile Industries Must Become Sustainable to Survive’, *RMIT University,* 23 June 2020, https://www.rmit.edu.vn/news/all-news/2020/june/vietnam-s-fashion-and-textile-industries-must-become-sustainable, (accessed 20 January 2021)

Hogan, L., ’The True Cost of Myanmar’s Growing Garment Industry’, *The World,* 29 May 2019, https://www.pri.org/stories/2018-05-29/true-cost-myanmars-growing-garment-industry, (accessed 15 Januart 2021)

Hsu, H. ’Indonesia Expands Textile Productionm Claiming Sustainability, *The News Lens,* 2 March 2020, https://international.thenewslens.com/article/131895, (accessed 10 December 2020).
http://www.wrap.org.uk/sustainable-textiles/scap, (accessed 24 November 2020)
Hubbub in Smithers, R., ‘MPs Urge Government to Fix ‘Throwaway’ Fast-fashion Trend’, *The Guardian,* 15 September 2020, https://www.theguardian.com/fashion/2020/sep/15/mps-urge-government-fix-throwaway-fast-fashion-trend-sustainable, (accessed 15 December 2020)

Human Rights Watch, ’Work Faster or Get Out: Labor Rights Abuses in Cambodia’s Garment Industry’, *Human Rights Watch News Release,* 18 March 2015, https://www.hrw.org/report/2015/03/11/work-faster-or-get-out/labor-rights-abuses-cambodias-garment-industry#, (accessed 14 January 2021)

J. X. Wu and L. Li, ‘Sustainability Initiatives in the Fashion Industry’, *Fashion Industry: An Itinerary Between Feelings and Technology,* R. Beltramo (ed.), London, IntechOpen, 2019

Kasparova, K. ‘Lalalove, Designs That are Hard to Miss’, *Luxiders,* 2019, https://luxiders.com/sustainable-fashion-lalalove/, (accessed 15 December 2020)

Kim, A., Potia, A. and Wintels, S. ‘Southeast Asia: A Region of Nuanced Opportunity’, *The State of Fashion 2020,* Business of Fashion and McKinsey & Company, 2020

Kheng, J. N. S., ’Sustaining the Magnificent Craft of Songket Weaving in Malaysia’, *Textile Society of America,* 12th Biennial Symposium, Lincoln, 6-9 October 2010

KLFW, *Design to Sustain,* 2020, http://klfashionweek.website/design-to-sustain, (accessed 15 January 2021)

KPMG, *Sustainable Fashion: A Survey on Global Perspectives,* Hong Kong, 2019

Kusá, A. and Urmínová, M. ‘’Communication as a Part of Identity of Sustainable Subjects in Fashion’, *Journal of Risk and Financial Management,* vol. 13, no. 305, 2020, pp. 1-16

Lee, H. C. B., Cruz, J. M. and Shankar, R. ‘Corporate Social Responsibility (CSR) Issues in Supply Chain Competition: Should Greenwashing Be Regulated?’, *Decision Sciences,* vol. 49, no. 6, 2018, pp. 1088- 1115

Locsin (2007), cited and stylized in Fashion Revolution, *The Impact of the Importation of Second-hand Clothing in the Philippines,* April 2019

Lohmeyer, N. and Schüßler, E. ’Rana Plaza as a Threat to the Fast Fashion Model? An Analysis of Institutional Responses to the Disaster in Germany’, *Eco Friendly and Fair: Fast Fashion and Consumer Behavior,* Becker-Leifhold, C. and Heuer, M. (eds.), Sheffield, Greenleaf Publishing, 2018

Lyst and Good On You, *The 2020 Conscious Fashion Report,* Lyst, 2020, https://www.lyst.com/data/2020-conscious-fashion-report/, (accessed 15 December 2020)

Majumdar, A., Shaw, M. and Sinha, K. ‘Covid-19 Debunks the Myth of Socially Sustainable Supply Chain: A Case of the Clothing Industry in South Asian Countries, *Sustainable Production and Consumption,* vol. 24, 2020, pp. 150-155

Malaysia External Trade Development Corporation, ‘MATRADE to Facilitate Malaysia’s Transformation as a Sustainable Trading Nation’, *The Official Portal,* 2019, https://www.matrade.gov.my/en/about-matrade/media/press-releases/4727-matrade-to-facilitate-malaysia-s-transformation-as-a-sustainable-trading-nation, (accessed 15 January 2021)

MasterCard in Preuss, S. ’Consumers in Emerging Markets More Concerned about Ethics, Environment’, ‘*Fashion United’,* 7 April 2015, https://fashionunited.uk/news/retail/consumers-in-emerging-markets-more-concerned-about-ethics-environment/2015040716051, (accessed 10 December 2020)

McFall-Johnsen, M., ’These Facts Show How Unsustainable the Fashion Industry Is’, *World Economic Forum: Environment and Natural Resource Security,* 31 January 2020, https://www.weforum.org/agenda/2020/01/fashion-industry-carbon-unsustainable-environment-pollution/ (accessed 15 December 2020)

McMaster, M., Nettleton, C., Tom, C., Xu, B., Cao, C. and Qiao, P., ‘Risk Management: Rethinking Fashion Supply Chain Management for Multinational Corporations in Light of the COVID-19 Outbreak’, *Journal of Risk and Financial Management,* vol. 13, no. 173, 2020, p. 8 (pp. 1-16)

Medvedev, K., ’Designing from Dumpsters: Cambodians Start at Grassroots with Fashion’, *Fashion Practice,* 2(2), 2010, pp. 223-248

Medvedev, K., ’Cambodian Fashion NGOs: Are They Doing Any Good?’, *Journal of Textile Engineering and Fashion Technology,* 1(4), 2017, pp.148-151

Mehta, S., Saxena, T. and Purohit, N. ’The New Consumer Behavior Paradigm Amid COVID-19: Permanent or Transient?’, *Journal of Health Management,* vol. 22, no. 2, 2020, pp. 291-301

MGMA, *Myanmar Garment Industry 10-year Strategy 2015-2024,* 2015

Mohamad, S. M. and Hassim, N. ‘Hijabi Celebrification and Hijab Consumption in Brunei and Malaysia’, *Celebrity Studies’,* 2019, pp. 1-25

Mollard, M., ‘Consumer Attitudes: COVID-19 x Fashion’, *Heuritech,* 6 May 2020, https://www.heuritech.com/blog/articles/consumer-attitudes-covid-fashion/, (accessed 17 December 2020)

Moon, K. K-L., Lai, C. S-Y., Lam, E. Y-N. and Chang, J. M. T., ‘Popularization of Sustainable Fashion: Barriers and Solutions’, *The Journal of The Textile Institute’,* vol. 106, no. 9, 2015, pp. 939-952

Moretto, A., Macchion, L., Lion, A., Caniato, F., Danese, P. and Vinelli, A., ’Designing a Roadmap Towards a Sustainable Supply Chain: A Focus on the Fashion Industry’, *Journal of Cleaner Production,* vol. 193, 2018, pp. 169-184

Nayak, R., Akbari, M. and Far, S. M., ‘Recent Sustainable Trends in Vietnam’s Fashion Supply Chain’, *Journal of Cleaner Production,* vol. 10, 2019, pp. 291-303

Nayak, R., Nguyen, T., Gaimster, J., Panwar, T. and Morris, R., ’The Challenges for Sustainability Marketing Approach: An Empirical Study in Vietnamese Fashion SMEs’, *International Journal of Trade, Economics and Finance,* 10(4), 2019, pp. 104-107

Netto, S., Sobral, M. F. F., Ribeiro, A. R. B., and Soares, R. L.., ’Concepts and Forms of Greenwashing: A Systematic Review’, *Environmental Sciences Europe,* 32(19), 2020, pp. 1-12

Nielsen, ’A Natural Rise in Sustainability Around the World’, *Nielsen Insights,* 10 October 2019, https://www.nielsen.com/us/en/insights/article/2019/a-natural-rise-in-sustainability-around-the-world/, (accessed 15 December 2020).

Nielsen, ’Sustainability Continues to Gain Momentum Among Singaporeans And Southeast Asian Consumers’, *Nielsen Press Room,* 17 October 2015, https://www.nielsen.com/sg/en/press-releases/2015/sustainability-continues-to-gain-momentum-among-singaporeans-and-southeast-asian-consumers/, (accessed 9 December 2020).

Niinimäki, K., Peters, G., Dahlbo, H., Perry, P., Rissanen, T. and Gwilt, A., ’The Environmental Price of Fast Fashion’, *Nature Reviews Earth and Environment,* vol. 1, 2020, pp. 189-200

Nolintha, V. and Jajri, I., 'Garment Industry in Laos: Technical Capabilities, Global Production Chains and Competetiveness, *ERIA Discussion Paper Series,* 2015, pp. 1-44

Nolintha, V., 'Tough Times in the Laos Garment Industry, *East Asia Forum,* 3 June 2016, https://www.eastasiaforum.org/2016/06/03/tough-times-in-the-laos-garment-industry/, (accessed 11 January 2021)

Nordic Council of Ministers, *Well Dressed in a Clean Environment: Nordic Action Plan for Sustainable Fashion and Textiles,* Norden, 2015

Nyein, N., 'Ethical Fashion Empowering Underprivileged Women', *The Irrawaddy,* 3 August 2018, https://www.irrawaddy.com/in-person/profile/ethical-fashion-empowering-underprivileged-women.html, (accessed 16 January 2021)

Office of the National Economic and Social Development Board, *Summary: The Twelfth National Economic and Social Development Plan,* Bangkok, 2017

P4G Partnerships, 'About', *2020 Circular Fashion System Commitment,* 2019, https://p4gpartnerships.org/partnership/2020-circular-fashion-system-commitment, (accessed 18 December 2020)

Parung, C. A., 'How do the Indonesian Ecologically Conscious Millennials Value Upcycled Clothing?', *International Conference on Informatics, Technology and Engineering Series,* vol. 703, 2019, pp. 1-6

Peirson-Smith, A. and Craik, J. 'Transforming Sustainable Fashion in a Decolonial Context: The Case of Redress in Hong Kong', *Fashion Theory: The Journal of Dress, Body and Culture,* vol. 24, no. 6, 2020, pp. 921-946

Price, D. 'Worse for Wear: Indonesia's Textile Boom', *UNDark,* 23 February 2017, https://undark.org/2017/02/23/indonesia-textiles-citarum-river-pollution-2/, (accessed 15 December 2020)

Prihandono, I. and Religi, F. H. 'Business and Human Rights Concerns in the Indonesian Textile Industry', *Yuridika,* vol. 34, no. 3, 2019, pp. 493-525

Rahman, R. and Eloksari, E. A., 'Price, Style More Important for Indonesia's Consumers Than Sustainable Fashion', *Jakarta Post,* 27 November 2019, https://www.thejakartapost.com/news/2019/11/26/price-style-more-important-for-indonesias-consumers-than-sustainable-fashion.html, (accessed 12 December 2020)

Raworth (2004), cited and stylized in Fashion Revolution, *The Impact of the Importation of Second-hand Clothing in the Philippines,* April 2019

Redress, 'Our Story: What We Do', *Redress,* Hong Kong, 2020, https://www.redress.com.hk/about/story#, (accessed 2 December 2020)

Redress, 'The 3% Mountain', *Events,* 2020, https://www.redress.com.hk/events/2011/6/15/the-3-mountain, (accessed 20 January 2021)

Shihab, S., 'Post Fast Fashion: The Future of Fashion and the Rise of Resale, *The Jakarta Post,* 2 October 2019, https://www.thejakartapost.com/life/2019/10/02/post-fast-fashion-the-future-of-fashion-and-the-rise-of-resale.html, (accessed 13 December 2020)

SMART Textile & Garments, *Environmental Impact in the Myanmar Garment Industry*, 2021, https://smartmyanmar.org/en/environmental-impact-in-the-myanmar-garment-industry#slideshow-1, (accessed 15 January 2021)

SMART Textile & Garments, *About SMART,* 2021, https://smartmyanmar.org/en, (accessed 15 January 2021)

Styles, D. ’Indonesian President Signals River Pollution Reform’, *Ecotextile News*, 5 February 2018, https://www.ecotextile.com/2018020523238/dyes-chemicals-news/indonesian-president-signals-river-pollution-reform.html, (accessed 14 December 2020)

Sustainable Apparel Coalition, ’Our Vision’, *Sustainable Apparel Coalition: Transforming the Apparel, Footwear and Textile Industry’,* 2020, https://apparelcoalition.org, (accessed 10 December 2020)’

Tan, G. ’Why is Sustainability Not Gaining Traction in Singapore?’, *T Magazine Singapore,* 23 April 2018, https://tsingapore.com/article/why-fashion-revolution-day-2018-sustainability-not-gaining-traction-singapore, (accessed 8 December 2020)

Tanzil, M. Y., ’The Sustainable Practices of Indonesian Fashion Brands’, *Program Book & Proceeding of the 1st International Conference on Art, Craft, Culture and Design 2017,* Bandung, Indonesia, 5-6 September 2017

The Asean Post, ‘Lao’s Art of Weaving’, *The Asean Post,* 29 November 2020, https://theaseanpost.com/article/laos-art-weaving, (accessed 11 January 2021)

The Asean Post, ’Changing Cambodia’s fashion industry’, *The Asean Post*, 31 January 2020. https://theaseanpost.com/article/changing-cambodias-fashion-industry, (accessed 20 January 2021)

The Business of Fashion and McKinsey & Company, *The State of Fashion 2017,* New York, 2016

The Fashion Pulpit, *Why Swap?,* 2020, https://www.thefashionpulpit.com, (accessed 8 December 2020)

Thingpila, K. *Fabricated Future: Applying the Theory of Planned Behavior to Influence Purchase Intention of Green Fashion made from Recycled Plastic in Thailand*, Master’s Thesis, The Swedish School of Textiles, 2019

Thong, N.T, Nguyen, D. H., Bich, P. T. N., and Huong, L. T. M., ’Chapter 13: Sustainable Consumption and Production in Vietnam’, *Sustainable Asia,* P. Schroeder, K. Anggraeni, S. Sartori and U. Weber (eds.), Singapore, World Scientific Publishing, 2017, pp. 327-356

Toyoshima, N. ’Kawaii Fashion in Thailand: The Consumption of Cuteness from Japan’, *Journal of Asia-Pacific Studies,* No. 24, 2015, pp. 189-210

UN Environment Programme, ’On Trend: Sustainable Fashion in the Wake of COVID-19, *Story: Resource Efficiency,* 16 June 2020, https://www.unenvironment.org/news-and-stories/story/trend-sustainable-fashion-wake-covid-19, (accessed 15 December 2020)

UNDP, *Circular Economy Strategies for Lao PDR: A Metabolic Approach to Redefine Resource Efficient and Low Carbon Development,* 2017

United Nations, ’Milestone Fashion Industry Charter for Climate Action Launched’, *UN Climate Press Release,* 10 December 2018, https://unfccc.int/news/milestone-fashion-industry-charter-for-climate-action-launched, (accessed 18 December 2020)

Unnikrishnan, S., Biggs, C. and Singh, N., ‘Sustainability Matters now More than Ever for Consumer Companies’, *Boston Consulting Group,* 11 August 2020, https://www.bcg.com/publications/2020/sustainability-matters-now-more-than-ever-for-consumer-companies, (accessed 17 December 2020)

Walk Free Foundation, *Global Slavery Index 2018,* Perth, 2018

WoonHung, ’Sustainability’, *What Powers WoonHung?,* https://www.woonhung.co/pages/philosophy, (accessed 7 December 2020)

Worker Rights Consortium, *Crackdown in Cambodia: Workers Seeking Higher Wages Meet Violent Repression,* 24 March 2014, https://www.workersrights.org/wp-content/uploads/2016/02/Crackdown-in-Cambodia-2014-03-low-res.pdf, (accessed 14 January 2021)

WRAP, ‘Sustainable Clothing Action Plan (SCAP)’, *WRAP: Our Plan,* 2020

Yang, S., Song, Y. and Tong, S. ‘Sustainable Retailing in the Fashion Industry: A Systematic Literature Review’, *Sustainability,* vol. 9, 2018, pp.1-19

Yee, L. W., Hassan, S. H. and Ramayah, T., ‘Sustainability and Philanthropic Awareness in Clothing Disposal Behavior Among Young Malaysian Consumers’, *SAGE Open,* 2016, pp. 1-10

Yendamuri, P. and Ingilizian, Z., ’8 Ways ASEAN Consumer Habits will Change by 2030 – Shaped by COVID-19, Tech and More, *World Economic Forum,* 10 June 2020, https://www.weforum.org/agenda/2020/06/8-ways-asean-consumer-habits-will-change-by-2030-shaped-by-covid19-tech-and-more/, (accessed 11 December 2020)
YouGov, ’Fast Fashion: 3 in 10 Indonesians Have Thrown Away Clothing After Wearing it Just Once’, *YouGov,* 6 December 2017, https://id.yougov.com/en-id/news/2017/12/06/fast-fashion/, (accessed 16 December 2020)

YouGov, ’Fast Fashion: 40% Of Thais Have Thrown Away Clothing after Wearing it Just Once’, 6 December 2017, https://th.yougov.com/en-th/news/2017/12/06/fast-fashion/#/:~:text=Support-,Fast%20fashion:%2040%25%20of%20Thais%20have%20thrown%20away%20clothing,after%20wearing%20it%20just%20once&text=Members%20of%20the%20YouGov%20staff.&text=The%20number%20of%20garments%20bought,between%202000%20and%202014%20alone, (accessed 15 December 2020).