REPORT

DRIVING FOR CIRCULARITY:

Collaborating for Industry Impact

the mills fabrica 南豐作坊

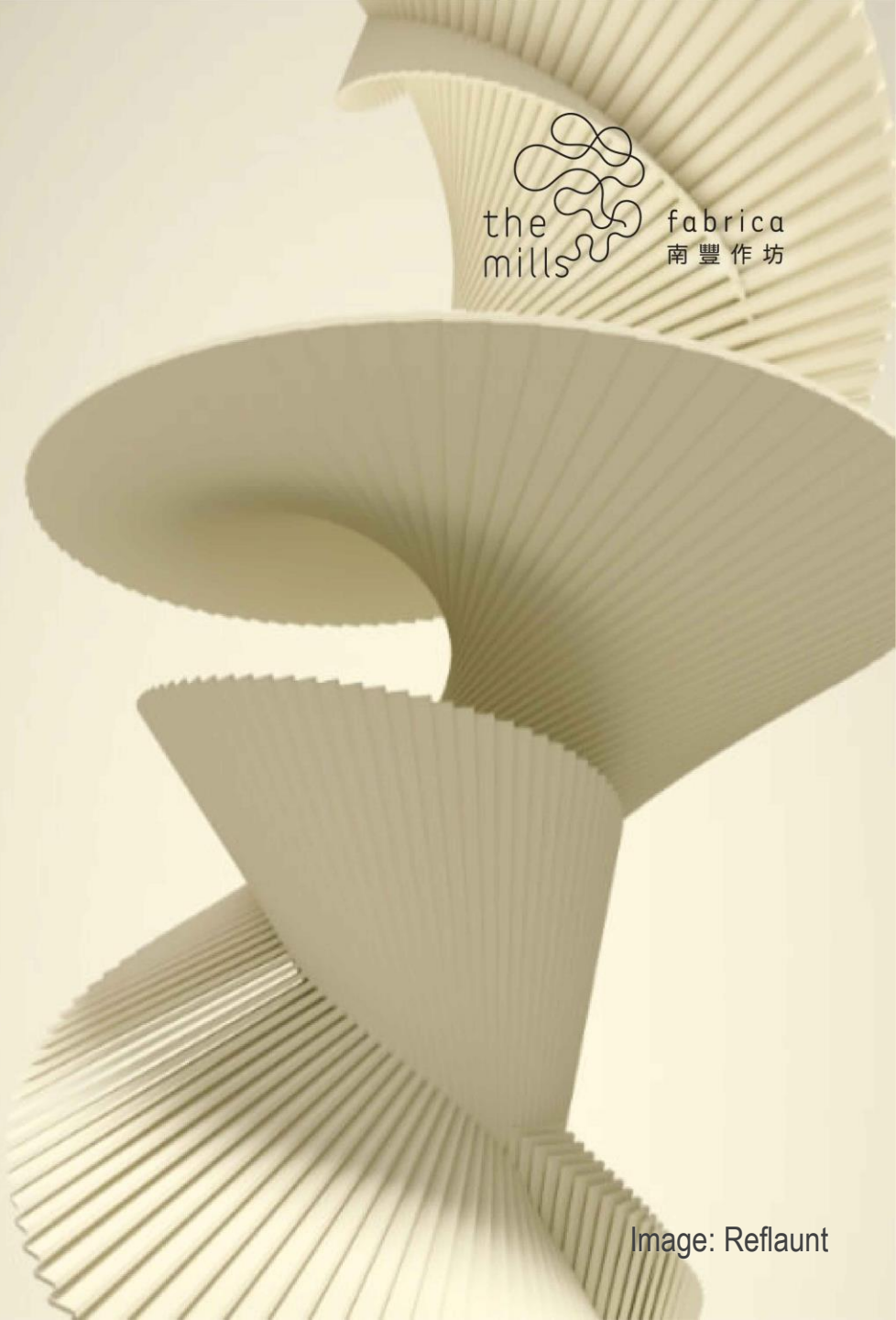


Image: Reflaunt

Executive Summary

Circular economy is emerging as the theme of our times. It refers to decoupling growth from the consumption of finite resources – minimizing waste and maximizing the value of materials used. While this is closely linked to a sustainable way of living, achieving the transition to a circular economy from the current linear model requires the community efforts as a whole.

This report looks at circular economy in the context of the apparel industry. There is increasing momentum in achieving circularity in the apparel industry with brands adopting innovative solutions and favourable initiatives in place. However, barriers still exist. With reference to collaboration examples and case studies around the globe, we argue that it is important for the industry to collaborate together in order to drive for circularity. While Europe is leading the charge in this space, the same shall apply to Asia and our home city of Hong Kong.

Section 1 **The State of Circular Fashion**	**Section 2** **Key Challenges in Pursuing Circular Models**	**Section 3** **Collaborating for Impact**
We look at the current state of circular fashion in order to illustrate circular economy. Circular practices such as regenerative agriculture, recycling and retail-as-a-service models are highlighted with case studies of Patagonia and Levi's as well as the discussion of favourable initiatives in Europe.	We discuss three major challenges in pursuing circular models – financial costs, infrastructure and socio-cultural acceptance. This highlights the importance of concerted efforts from the community to transition to a circular economy.	We highlight the importance of collaborations in scaling innovations with case studies of two startups – Renewcell and Impossible Foods. We also look at common types of collaborations worldwide to achieve sustainability goals – task forces, innovation sourcing and pilots, as well as circular projects in Hong Kong.

[1] THE STATE OF CIRCULAR FASHION

[2] Key Challenges in Pursuing Circular Models

[3] Collaborating for Impact

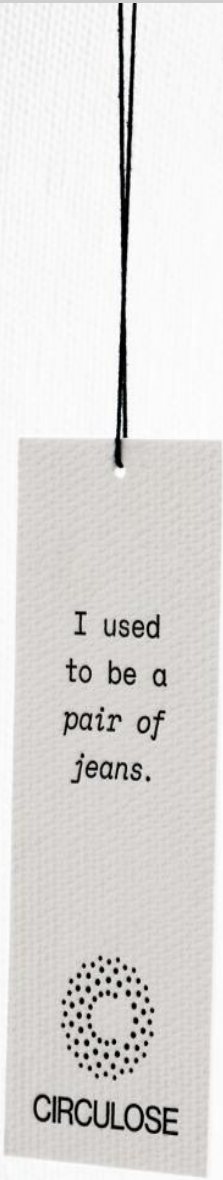


Image: Renewcell

Take-make-dispose:

Current linear production can no longer fulfil economic and environmental interests simultaneously

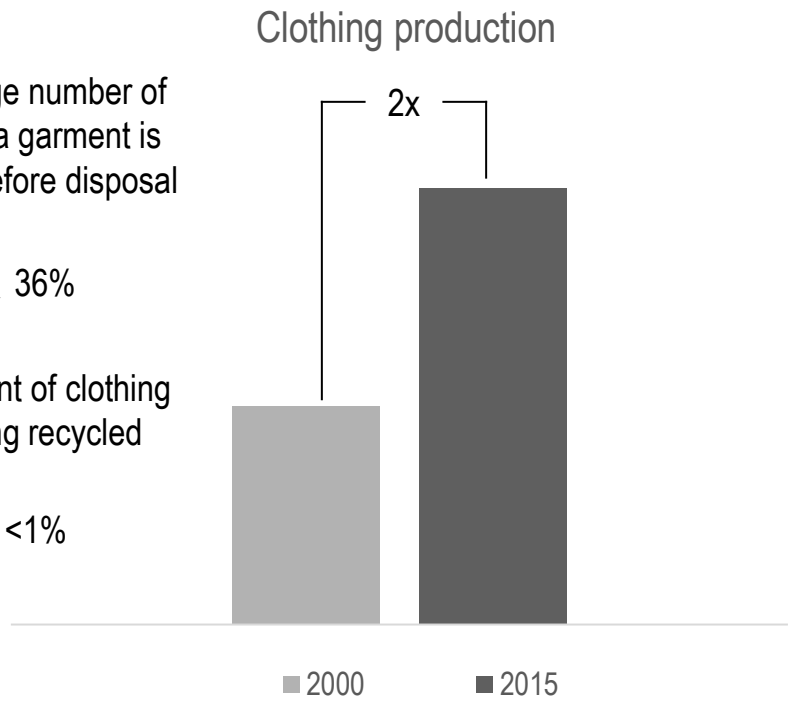
Clothing demand continues to grow but most have ended up as waste in landfills over the past two decades

Average number of times a garment is worn before disposal

36%

Amount of clothing being recycled

<1%



The take-make-dispose linear model could result in disastrous environmental impacts by 2050 at the current pace of production

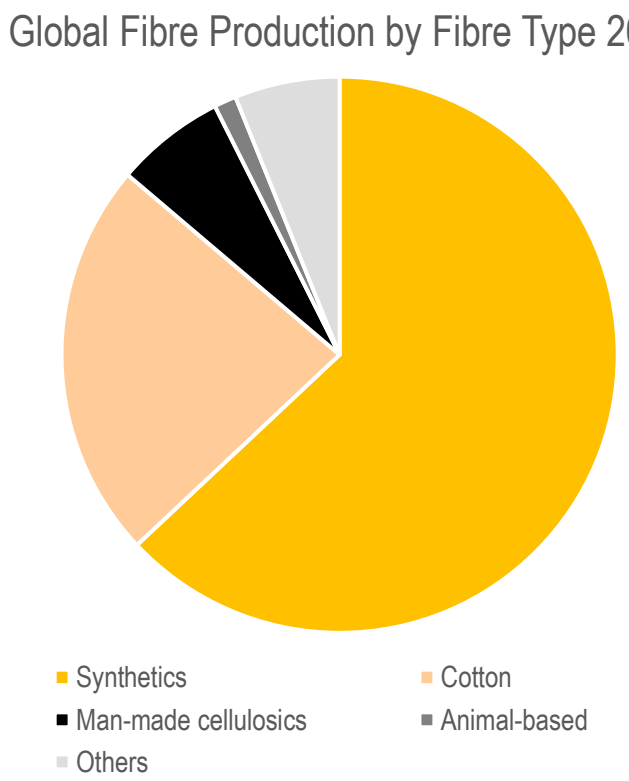
	2015	2050
Consumption of non-renewable resources such as oil by the textiles industry	98 million tonnes	300 million tonnes
Textiles industry's share of carbon budget*	2%	26%

**Carbon budget refers to the amount of greenhouse gases that can be emitted against a given level of global warming. A higher percentage share implies more efforts are needed to maintain the 2°C Paris target - keeping the 2°C average global warming limit*

Source: Ellen MacArthur Foundation, Fabrica analysis

Greater need to move away from the fossil fuel-based economy and explore wider choice of materials

Fossil fuel-based synthetics is currently the key fibre in apparel



Diversifying the choice of fibre is important when considering their varying impacts

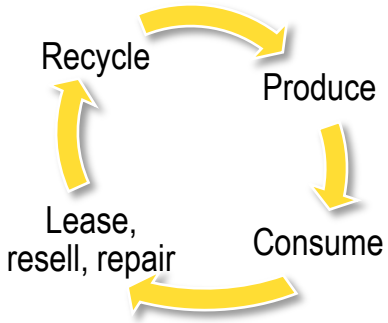
Synthetic fibre	• Synthetic fibres consist of polyester mostly and derive from non-renewable resources of oil and natural gas • The production process involves significant energy and chemicals; highly relevant to the problem of climate change and microfibre pollution in the ocean
Natural fibre	• Natural fibres such as cotton tend to have significant impacts on land as they consume a lot of pesticides, fertilizers and water to grow
Man-made cellulosic fibre	• Man-made cellulosic fibres such as viscose are usually extracted from wood using chemical solvents • The production process can result in loss of endangered forests and environmental contamination if not managed properly

Source: Textile Exchange, Natural Resources Defense Council, Fabrica analysis

Towards a Circular Economy:

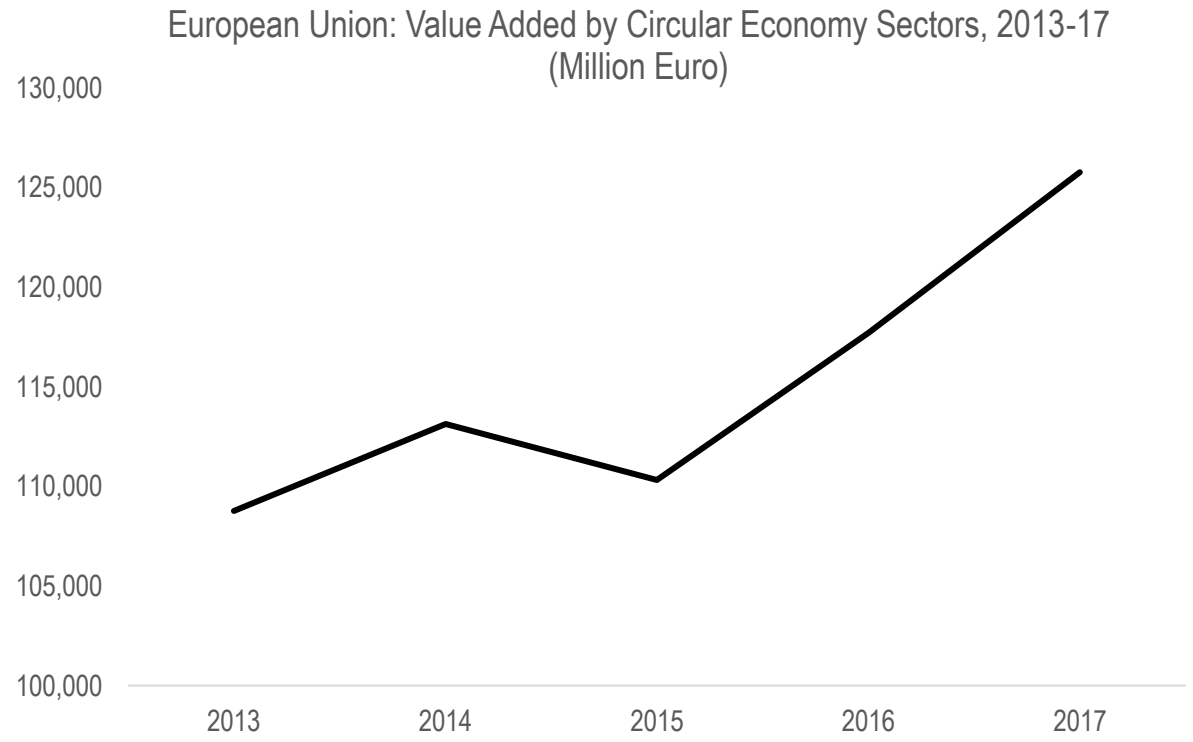
An environmentally-friendly, regenerative closed-loop production system

Circular Economy is a regenerative system that aims to maintain the value of materials and products as long as possible in order to minimize environmental impacts

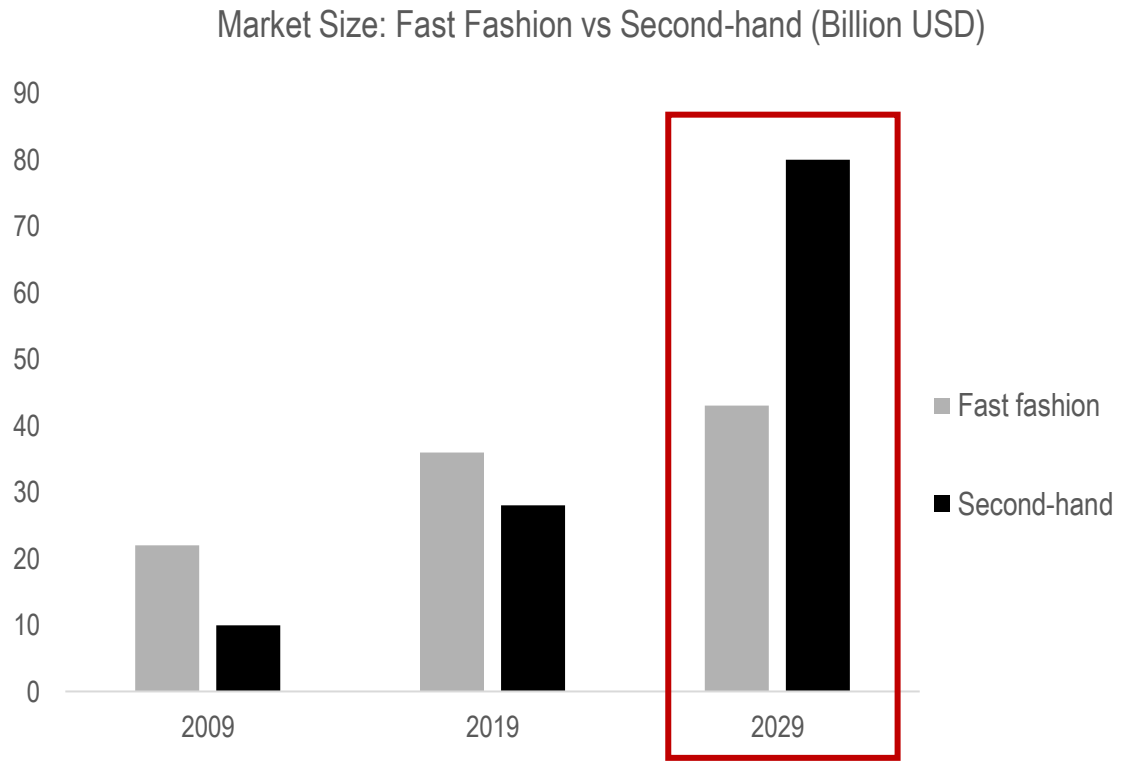
Circular model		Take-make-dispose linear model
	VS	Take → Make → Dispose
Towards renewable energy and resources		*Fossil fuel-oriented*
Biodegradable and safe when returning to nature		*Harmful to natural ecosystems*

Circular Economy has strong economic potential

Circular economy sectors are driving the EU economy, with nearly 16% growth from 2013 to 2017



Circular fashion market estimated to be worth ~$500B USD; second-hand fashion projected to be nearly twice the size of fast fashion by 2029



Source: Ellen MacArthur Foundation, Eurostat, ThredUp 2020 Resale Report, Fabrica analysis

Economic potential would need to be unlocked by circularity innovations across the value chain…

Production of Raw Materials

Regenerative Agriculture – conserve soil health & biodiversity

Regenerative Organic Certified™ · FIBERSHED · Savory

Alternative Sustainable Materials – e.g. biofabrics

MANGOMATERIALS™ · Algalife · huue. · MYCO WORKS · AMSilk · CARBIOS · spiber · BOLT THREADS · Modern Meadow

Design and Production

On-demand Production – made-as-ordered when needed

unspun · UNMADE · BODI.ME

3D Design – iterate design digitally minimizing physical prototypes

CLO · tg3d STUDIO · BROWZWEAR

Additive Manufacturing – precision manufacturing minimizing waste

VOODOO MANUFACTURING · MakerBot · Carbon

Post-Consumer

Rental

One-off-rental · Peer-to-peer rental

STYLE THEORY · StyleLend · By Rotation · HURR · WARDROBE

Subscription rental

LE TOTE · CIRCOS · YCLOSET · FOR DAYS · RE-NT

Resale

Resale platform · Peer-to-peer resale

THREDUP · The RealReal · Vestiaire Collective · POSHMARK · depop

Chemical Recycling

RENEWCELL · EVRNU · TYTON BioSciences · worn again · INFINITED FIBER

Retail-as-a-service

Rental · Resale · Recycle

CaaStle · Lizee · THREDUP · REFLAUNT · reGAIN app

Other Infrastructure

Collect & logistics

I:CO · Reverse Resources

Packaging – reusable, traceable

LIVINGPACKETS · RePack · RETURNITY

..with emerging trends focusing on better technologies and new business models for circularity

Shifting trends			Implications	Example
1	Platforms	**Retail-as-a-service**	Retail-as-a-service offers turnkey solutions to streamline the management of used garments e.g. collection of waste from consumers, warehousing, logistics, quality inspection	 COS taps into Reflaunt's infrastructure for resale services
2	Mechanical recycling	**Chemical recycling**	Chemical recycling is able to retain the economic value of output compared to mechanical recycling. It is more effective in separating colour shades and fabric blends to provide quality materials for reuse	 H&M launches a jacquard weave day dress made with Circulose, a chemically recycled fibre developed by Renewcell
3	Lack of visibility	**Tracing origin**	Regenerative agriculture regulates environmental impacts from the start, conserving resources to a greater extent	 Timberland works with The Savory Institute to develop a regenerative leather supply chain

Source: COS, H&M, The Savory Institute, Fabrica analysis

Innovation growth fuelled by brands committing to circular and sustainable practices

100% recycled or other sustainably-sourced materials by 2030	100% of its products to be designed for circularity by 2030	Carbon neutral by 2025	100% sustainably sourced key materials including cotton by 2025	Fully circular products by 2030
Reduce carbon footprint by 2030 with an absolute reduction of Scope 1 and 2 emissions by 65%	Only use recycled polyester in all adidas products across the business by 2024	100% of cotton sourced more sustainably by 2022	Reduce GHG emissions by 40% by 2025	Only use recycled polyester by 2025

Source: Company websites, Fabrica analysis

Case Study: Patagonia Embracing Circularity

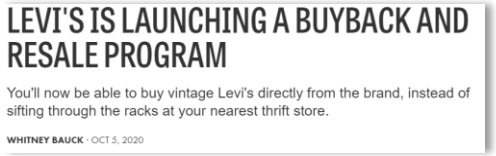
Regenerative agriculture	Repair, Resale & Recycle	Rental	Recycled polyester
Help establish the Regenerative Organic Certification to conserve soil health	Trading in used Patagonia garments for store credits; the products will get repaired, resold or recycled	Partner with renting platform Awayco to offer rental services for snow gear	REPREVE is a recycled polyester used in a wide range of Patagonia's fleece items

Source: Patagonia, EnvironmentalLeader.com, Fabrica analysis

Case Study: Levi's Embracing Circularity

In-store repair services	In-store collection of post-consumer waste	Rental	Resale	Recycled cotton	
Repair, resize and restyle customers' denim	Partnership: Cotton Incorporated's Blue Jeans Go Green denim recycling program	A rental denim collection with Danish brand Ganni	Operate Levi's SecondHand with the help of Trove, a resale-as-a-service company	Produce jeans with recycled input using Renewcell's technology	Produce jeans with recycled input using Evrnu's technology

Levi's® Simplifies the Tailor Shop Experience for Consumers



The Story Behind the Most Sustainable Levi's® Ever

Levi Strauss & Co. + EvrNu Create First Pair of Jeans From Post-Consumer Cotton Waste

Source: Levi's, Ganni, Fashion Network, Fabrica analysis

Innovations also further supported by favourable policies and initiatives with Europe leading the charge

Background

The **European Commission** adopted a new Circular Economy Action Plan in March 2020. It is part of the European Green Deal that aims to make sustainable products the norm in the EU.

7 key sectors

Target sectors using the most resources and having a high potential for circularity:

- Electronics and ICT
- Batteries and Vehicles
- Packaging
- Plastics
- Textiles
- Construction and Buildings
- Food

Make Fashion Circular – the Ellen MacArthur initiative originates from the Copenhagen Fashion Summit that strives towards creating a circular economy for fashion

Global Fashion Agenda is a leadership forum that hosts the world's leading business event on sustainability in fashion, the Copenhagen Fashion Summit

The Fashion Pact is a global coalition of companies within the fashion and textile industry with three key goals: stopping global warming, restoring biodiversity and protecting the oceans

Source: European Commission, Company websites, Fabrica analysis

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[1] The State of Circular Fashion

[2] KEY CHALLENGES IN PURSUING CIRCULAR MODELS

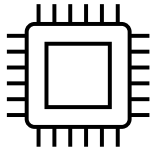
[3] Collaborating for Impact

Image: Algalife

Circular models still face challenges in cost, infrastructure and socio-cultural acceptance

Financial barriers

Difficulties remain for recycled materials to achieve price parity with virgin materials; capital support required to trial and develop circular models



Infrastructure barriers

Collection and recycling systems are not efficiently in place; Access to pre- and post- consumer waste is not fully convenient

Socio-cultural barriers

Community awareness affects the effectiveness of transitioning to circular economy including policy support, private sector efforts and consumer support

Financial barriers:

Consortiums and partnerships needed to concept-proof and develop circular models

- Recycled materials are usually priced higher than virgin materials e.g. recycled cotton yarn is more expensive than standard, virgin cotton yarn
- However, higher uptake of recycled materials can result in economies of scale that drives down costs
- Consortiums and partnerships are needed to enable trial and development of circular models

Initiative	LOOP	New Cotton Project	Circular Economy Accelerator
Details	Formed by Avanto Ventures, Nordic Innovation and the Finnish Innovation Fund Sitra in 2018, LOOP serves as a Nordic circular economy ecosystem	A European Union-funded project aims to trial a circular model for textile waste over a three-year period starting from 2020	Initiated by non-profit The Recycling Partnership, it aims to connect private and public partners to resolve the low recycling of residential materials in the US
Role of collaborations	A **private-public collaboration** with support from investors and corporates to pilot and scale circular business ideas through three steps of Explore, Innovate and Act	• **Innovators** recycle textile waste into new fibres • **Manufacturers** use the recycled fibres to make clothes • **Apparel brands** organize take-back schemes for used clothes and sell clothes made with recycled fibres	A **consortium of major FMCG companies and industry associations** unite to advocate for sustainable funding and policy changes that incentivise recycling over disposal

Source: Cotton Incorporated, Company websites, Fabrica analysis

Infrastructure barriers:

Holistic coordination key to enabling circularity

- In general, apparel has a lower recycle rate than other categories such as paper and PET bottles
- Recycle rate depends on access to pre- and post- consumer waste and availability and maturity of technologies
- It requires a holistic coordination across manufacturing design, collection and recycling facilities to boost efficacy

Handling post-consumer textile waste

	Collect	Sort	Separate
Process	Collecting used garments from consumers	High degree of fabric blends, zips and buttons renders it a labour-intensive process	Removing dyes and other components for yarns to be reused
Solutions	Brands and retailers organize take-back schemes to incentivise consumers to reuse or recycle used clothing	Emerging technologies become available to automate sorting: • Hyperspectral cameras • Fibersort, a near-infrared-based technology that sorts by composition, colour and structure of fibre	Chemical recycling or using alternative materials that are easier to recycle

The three processes can be streamlined if recoverability is taken into account at the beginning by considering the use of materials, component parts and overall design

Source: BBC Future, Fibersort, Fabrica analysis

Socio-cultural barriers:

Creating incentives and raising awareness crucial to transition to circular economy

Concerted efforts from the community help transition to circular economy:

- Government plays an important role in incentivizing changes initially either through fiscal policy or legislation
- This creates momentum and gradually peer pressure for companies to take actions
- Consumer support for eco-friendly products can counter-influence decisions at corporate and manufacturing levels

Creating incentives

Tax

Shift from taxing labour to taxing consumption of resources

Sweden decreases value-added tax on labour for certain repair services to encourage longer use of products

Legislation

Enact new laws to change behaviour

China sets up a nationwide system for retailers to report usage of single-use plastics and submit formal recycling plans

Raising awareness

Education

Convey messages via public campaigns

London organizes the Love-Not-Landfill campaign encouraging young consumers to recycle clothes with eye-catching clothes banks installed at busy shopping locations

Branding

Make responsible consumption fashionable

Rise of environmentally-conscious brands such as Allbirds and Everlane in the US help build a favorable climate for shopping eco-friendly products

Source: Reuters, Ecopreneur.eu, Love Not Landfill, Fabrica analysis

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[1] The State of Circular Fashion

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[3] COLLABORATING FOR IMPACT

Image: Evrnu

We need more pilots and collaborations to drive circularity forward

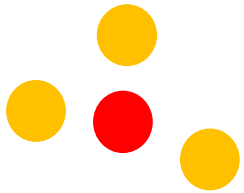
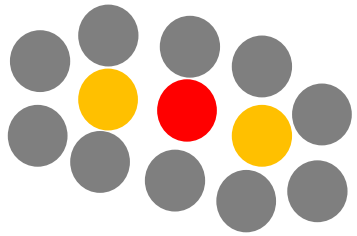
Pilots

Pilots help test and launch new innovations and technologies, especially for disruptive technologies to demonstrate they are possible to scale up

Collaborations

Through collaborations, cross-sectoral challenges can be addressed by understanding problems in depth and identifying innovation opportunities

Scaling Innovations for Impact – from pilot to scale through collaborations

Demonstration	Diffusion	Dispersion
		
Pilot showcase of innovation	***Innovation can be replicated***	***Impact at scale***
• *Anchor brand partner* • *Launch of consumer brand to raise awareness*	• *Expand to different brand partners and product segments* • *Securing key supply chain partnerships*	• *Larger scale product launches* • *Building out of production infrastructure*

Case Study

RENEWCELL

Renewcell is a Swedish textile recycling company that produces Circulose, a patented material recycled from cotton and viscose. It grew with initial success with brand projects, followed by partnerships across the supply chain and continues to scale up.

IMPOSSIBLE™

Impossible Foods is a US plant-based meat company. It started by supplying the Impossible Burger at restaurant chains and gradually expanded to grocery stores with increasing product ranges serving the US and Asian markets.

Renewcell:

Strong commercial and supply chain development within last 18-24 months

Demonstration	Diffusion	Dispersion

Pilot showcase of innovation

Innovation can be replicated

Impact at scale

Nov 2019 — *Launch of Circulose Brand*

Mar 2020 — *Launch of H&M collection*

Jul 2020 — *Launch of Levi's most sustainable jean*

Oct 2020 — *Scale up textile recycling at SCA's industrial site*

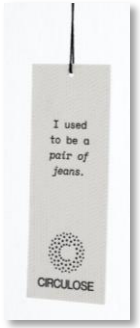
Oct 2020 — *BESTSELLER brands adopt Circulose*

Oct 2020 — *Five-year deal supplying Circulose to Tangshan Sanyou*

Nov 2020 — *Bank & Vogue supply textile waste to be recycled*

Nov 2020 — *Five-year deal supplying Circulose to H&M Group*

Nov 2020 — *IPO*



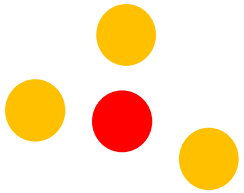
Source: Company websites, Fabrica analysis

Impossible Foods:

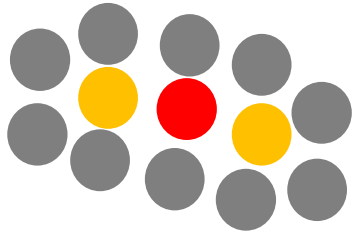
Robust domestic and international expansion with new product categories

Demonstration	Diffusion	Dispersion

Pilot showcase of innovation



Innovation can be replicated



Impact at scale

Jul 2016
Debut Impossible Burger at New York City restaurant Momofuku Nishi

Summer 2017
Impossible Burger launches at restaurant chains such as Bareburger, Umami Burger

Apr 2018
First international debut of Impossible Burger in Hong Kong restaurants

Aug 2019
Burger King rolls out the Impossible Whopper in all US locations

Aug 2019
Partner with OSI Group to expand production capacity

Sep 2019
Impossible Burger patties begin to sell at grocery stores in the US

Jan 2020
Launch of new products Impossible Pork and Impossible Sausage

Sep 2020
Impossible Sausage launches at restaurants and supermarkets in Hong Kong

Source: Company websites, Fabrica analysis

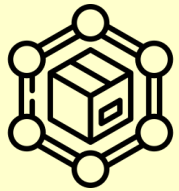
Key learnings from the case studies

Lessons for Innovators

Initial awareness building
Gain attention by launching with brands and understanding product-market fit & consumers' feedback

Market expansion
Replicate strategies to other markets after initial launch to demonstrate tech's ability to scale to other segments & geographies

Lessons for Corporate Partners



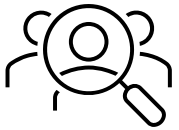
Connecting partners
Mobilize supply chain partners to work with innovators to test and learn new solutions

Roadmap of products
Start with pilots and iterate sustainability strategies with further product launches at increasing volume & product categories

Collaborations remain key to enable bigger impacts

Task Forces

Task forces are formed to address circularity and sustainability issues in the industry, with industry guidelines and best practices formulated.



Innovation Sourcing and Callouts

When the issues are defined, corporations look out for potential solutions and identify the most suitable ones for their case.

Pilot with Innovators

Companies further trial and validate these nascent solutions and technologies with innovators.

Collaborating as a group catalyzes the transition to circularity by:

- Spreading out costs of trialing innovations
- Facilitating mutual learnings from projects and partners
- Building momentum to enable bigger societal impacts

Task Forces

help bring industry partners on a common learning journey to analyse and define industry challenges

"A collective learning journey"

- Task forces are helpful in gathering industry stakeholders to address common challenges or raising interest in emerging fields
- Typical outputs involve jointly analyzing the root causes of a problem and collectively defining guidelines, frameworks and blueprints for potential solutions

	Background	Output	Highlights
LEATHER WORKING GROUP Improving Environmental Stewardship	**Leather Working Group** (LWG) is a non-profit organization that identifies best practices for the global leather industry. Its founding members include global brands such as Adidas, Nike and key leather manufacturers.	Developed various audit protocols to assess the environmental impacts of leather practices including: • LWG Environmental Audit Protocol • LWG Trader Audit Protocol	• Data gathered from audits inform the development of benchmarks and standards • Tanneries of the task force reduce energy usage by >30%
aboutbiosynthetics.org	**Biosynthetics Working Group** is an initiative by non-profit Textile Exchange. This task force focuses on building knowledge and supporting the development of biosynthetics as an emerging preferred fibre.	Created the aboutbiosynthetics.org website which gathers available information and resources on biosynthetics	• This task force helps build traction for the nascent field of biosynthetics as an alternative to fossil-based materials

Source: Leather Working Group, Textile Exchange

Innovation sourcing

identify the innovation landscape to shortlist potential solutions for the problems

"Mapping & shortlisting"

- Innovation sourcing begins with a landscaping and mapping of key technologies & innovations pertaining to a specific area
- By looking out for solutions globally and evaluating them on technical functionality and ease of scalability; potential solutions can be shortlisted for piloting.

Background

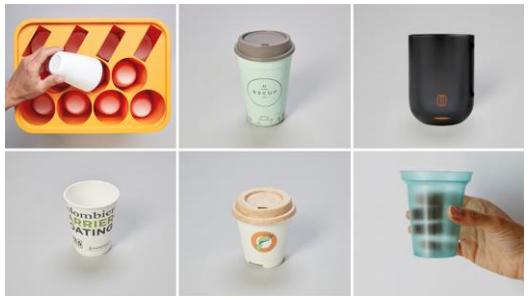
The **NextGen Cup** is a multi-year consortium of the food and beverage industry to address single-use food packaging waste. It is organized by investment firm Closed Loop Partners with Starbucks and McDonald's as the founding partners.

CLOSED LOOP partners

NEXTGEN CUP

Output

The project aims to find recoverable solutions for fibre cups that fit into different regional recovery infrastructure through a three-stage process, including a global competition to call out for new solutions.



Highlights

- This project provides funding support and pilot opportunities for winning solutions to test the market and further scale up.
- The consortium works across the value chain in order to match solutions to different value chain partners including:

Nestlé Good Food, Good Life

IDEO

THE Coca-Cola CO. USA

Wendy's

Yum!

Source: Closed Loop Partners

Piloting with innovators

helps create industry & consumer awareness while allowing solutions to be tested, refined & scaled

"Pilot & Demonstrations"

- When established companies work with innovators, emerging solutions can be further validated gathering both consumer feedback as well as lessons learnt on the testing & implementation of the technology
- Pilots also help build market traction & momentum for further expansion

Background

Fashion for Good initiates the **Full Circle Textiles Project** to connect brands, innovators, manufacturers and investors to validate chemical recycling technologies for cellulosic fibre through piloting.

FASHION FOR GOOD

Output

The project aims to explore economically viable and scalable solutions for cellulosic chemical recycling by piloting with the five innovators specialized in this field.

COMING FULL CIRCLE: INNOVATING TOWARDS SUSTAINABLE MAN-MADE CELLULOSIC FIBRES

Highlights

The project helps advance chemical recycling by closing the gap in financing and limited uptake by brands.

Working across the value chain helps the apparel industry to experiment with the promising chemically recycled fibre:

Corporate partners

KERING, Birla Cellulose (Fibres from nature), PVH, TARGET

Innovators

RENEWCELL, EVRNU, INFINITED FIBER, PHOENXT, TYTON BioSciences

Source: Fashion For Good

Circular Projects in Hong Kong:

G2G Recycle System, The Novetex Upcycling demonstrate a “front & back-end” recycling model

FRONT-END:
Garment-to-Garment (G2G) Store

BACK-END:
The Novetex Upcycling Factory

Background

The G2G Recycle System is a **customer-facing** mini production line that recycles post-consumer garments into clean and wearable clothes at The Mills. It is a joint collaboration among the Hong Kong Research Institute of Textiles and Apparel (HKRITA), H&M Foundation, Novetex Textiles Limited and The Common Ground.

The Novetex Upcycling factory in Tai Po is a large-scale textiles recycling facility that does not consume water or produce chemical waste and also includes innovations in sorting & separating garment waste. It is a joint collaboration between Novetex Textiles Limited and HKRITA.

Highlights

Consumer education
It is an experiential retail concept where consumers can witness the upcycling process in-store

Mini on-site production
The G2G system can process 40 used sweaters and t-shirts monthly allowing consumers to experience recycling “live”

Industrial scale-up
The Novetex Upcycling factory can handle up to three tonnes of textile waste per day in Hong Kong; helping provide capacity at scale to support the front-end recycling retail store

Source: HKRITA, Novetex

Circular Projects in Hong Kong:

New Life Plastics JV convenes 3 key partners focusing not just on recycling but also consumer engagement and logistics/ collection

The New Life Plastics JV

Background

The New Life Plastics JV is Hong Kong's first dedicated PET and HDPE recycling facility at Eco Park in Tuen Mun. It is jointly formed by ALBA, Baguio and Swire Coca-Cola.

ALBA 碧瑤 BAGUIO Coca-Cola SWIRE COCA-COLA

Highlights

Convergence of expertise
ALBA – recycling technology
Baguio – domestic collection network
Swire Coca-Cola – domestic beverages market

Consumer education
The plant features a viewing gallery with tours that explain the plastics recycling process

Industrial scale-up
The plant aims to recycle over 35,000 tonnes of post-consumer PET and HDPE into food-grade flakes and pellets for reuse

Community engagement for collection
Project also involves holistic thinking on other recycling challenges like collection through engagement with schools, corporates & other institutions as collection points for waste

Source: New Life Plastics

Conclusion

The State of Circular Fashion

- More apparel brands and retailers embrace circular economy by adopting innovations in rental, resale, recycling and practicing regenerative agriculture. The circular models are beneficial to economic growth and addressing global warming.
- Europe leads in driving circular economy with favorable policies and measures in place that unite stakeholders to achieve sustainability goals together.

Key Challenges in Pursuing Circular Models

- Recycled materials tend to be costly. Forming industry consortiums and partnerships are helpful in trialing and developing circular models fast.
- Infrastructure is crucial requiring a holistic coordination across manufacturing design, collection and recycling facilities to enable circularity.
- Concerted efforts from the community are needed to create incentives and raise awareness to help the industry transition to circular models.

Collaborating for Impact

- More pilots and collaborations are helpful in driving circularity forward as startups Renewcell and Impossible Foods have demonstrated their success.
- There are three common types of collaborations worldwide: task forces, innovation sourcing and callouts, pilots with innovators. The key lies in uniting important stakeholders to resolve common industry challenges together.
- Circular projects are gaining traction in Hong Kong with the examples of G2G Recycle System, The Novetex Upcycling factory and The New Life Plastics JV.

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