



Synthetics Anonymous

Fashion brands' addiction to fossil fuels

The information in this document has been obtained in good faith from sources that are believed to be reliable, but any potential interpretation of this report as making an allegation against a specific company or companies named would be misleading and incorrect. The authors accept no liability whatsoever for any direct or consequential loss arising from the use of this document or its contents.

This report was researched and written by Changing Markets Foundation.

www.changingmarkets.org

Designed by Pietro Bruni: toshi.ltd

Printed on recycled paper

Published in June 2021

STAND
earth

Clean
Clothes
Campaign

PLASTIC FOUNDATION
SOUP

NO PLASTIC
IN MY SEA

Changing Markets
FOUNDATION

FASHION
REVOLUTION

RE TORNA

Executive summary

This report investigates the behaviour of some of the biggest fashion brands and retailers regarding their use of synthetic fibres and transparency about doing so. The fashion industry and its prevailing fast-fashion business model rely heavily on the use of cheap synthetic fibres, which are produced from fossil fuels, such as oil and gas. Since the early 2000s, fashion production has doubled – as has the use of polyester, which is now found in over half of all textiles.

Synthetic fibres represent over two-thirds (69%) of all materials used in textiles, which is expected to reach nearly three-quarters by 2030.¹ Fossil fibres are a key enabler of the fast-fashion business model, and their production already requires more oil than the annual consumption of Spain. Produced and sold cheaply, these items are often discarded after just seven or eight uses, ending up in landfills, incinerators or dumped in nature.² Cheap synthetic fibres not only facilitate the production of low-quality clothing that ends up as waste but also perpetuate the fashion industry's dependence on continued fossil-fuel extraction in the midst of a climate emergency. While other companies and sectors are decarbonising and aiming for a circular economy, it is clear that, given its addiction to synthetic fibres, the fashion industry is heading in entirely the wrong direction.

In this report, we seek to establish what brands are saying and doing regarding their reliance on synthetic fibres. We reached out to 46 brands with a questionnaire, and conducted desk research into their policies and public disclosure of relevant information on this topic. According to this, brands and retailers were classified into four categories – *frontrunners*, *could do better*, *trailing behind* and *red zone*. We conducted additional research to zero in on 12 brands' online shops, chosen specifically to represent a range of brands – from ultra-fast fashion to luxury, sports brands and those keen to advertise their sustainability credentials. We carried out a meticulous assessment of these brands' Spring/Summer 2021 collections, analysing data on synthetic fibre use and what sustainability claims the companies made around these products.

The findings of this research not only expose fashion brands' addiction to synthetics but also demonstrate rampant greenwashing across their voluntary commitments and products. In light of the European Commission's pledge to address greenwashing and the recent guidance from the UK's Competition Markets Authority (CMA) on environmental claims, the unsubstantiated claims found in our research may soon lead to legal repercussions for brands.

Key findings

Brands knee-deep in fossil fashion

The results of our analysis of 46 clothing companies are deeply concerning and show that fashion brands are still largely ignoring growing plastic pollution and the waste crisis stemming from their addiction to synthetic fibres.

In addition to a significant lack of transparency about the amount and source of synthetics in their collections, fashion brands resort to greenwashing tactics - such as downcycling polyethylene terephthalate (PET) bottles to clothes - rather than moving to truly circular solutions, in which products are designed to be more durable, reusable, repairable and recyclable.

Fashion brands have no systematic approach to addressing the environmental and health risks of microplastic pollution.

Lack of leadership to detox from fossil fashion

- Despite a high response rate of 83% (38 out of 46 brands), companies' disclosures about their policies, practices and use of synthetics was underwhelming. Only about half (26 brands) provided some level of transparency about their use of synthetics by percentage and weight - although this was not always broken down fibre by fibre.
- No company has made a clear commitment to phase out the use of synthetic fibres from their collections, leaving our *frontrunner* category empty.
- Only six companies - Dressmann, Esprit, Hugo Boss, Puma, Reformation and United Colors of Benetton - indicated they want to avoid or reduce synthetics altogether. When asked why, some cited the fact that they are produced from fossil fuels, or mentioned concerns associated with microfibres or general impacts on the environment.
- Most of the sports brands analysed (Adidas, Asics, Nike and Reebok) reported that the majority of their collections is based on synthetics, and expressed no plans to curtail this. Only Puma indicated that synthetics represent 'just' half of their total fabric material, and said it is endeavouring to gradually reduce the proportion of polyester used, showing that a lower reliance on synthetics is feasible in sportswear.
- Of the worst-performing brands assigned to our *red zone*, 15 are a combination of sports, high-street, luxury and department-store companies, the majority of which (11) are North American-based (US or Canada) - including Nike, Patagonia, Target and Walmart. Their complete lack of engagement, commitments or even transparency clearly shows that the issue of fossil fashion is not on their agenda.
- A surprising member of the red zone was Patagonia - a brand that has built its reputation on sustainability. We put it in the red zone because it has failed to publicly disclose any meaningful information about its use of synthetics and plans to phase them out nor did it engage with us on the questionnaire.

Downcycling adopted as a magic pill

- 'Recycled' polyester, made from PET bottles, is the principal way brands are planning to curb the impacts of fossil fashion and embrace more 'sustainable' synthetics - despite this being a false solution to today's plastic-pollution and waste problem. The majority of companies (85%) indicated they aim to achieve their 'recycled' polyester targets by using polyester from downcycled PET bottles.
- In contrast, none of the brands reported a high level of fibre-to-fibre recycling targets, nor a clear goal to move towards this type of recycling. Neither are companies making the necessary investments to ensure a future in which clothes can be recycled back to clothes, hindering a move to a true circular economy.

Lost in a sea of green claims

- Many brands still make misleading claims about how they are making their products more 'recyclable', despite having neither a takeback scheme nor fibre-to fibre recycling technology in place. Greenwashing was rampant across the targets the brands disclosed to us, including claims of using 'sustainable', 'preferred', 'sustainably sourced' or 'sustainably made' materials, the criteria for which were often ill defined and constitute unsubstantiated claims that mislead consumers.
- Further examples of greenwashing include brands promoting their sustainable image by claiming to use ocean plastic or recycled fishing nets in their products; for example, Patagonia and Adidas advertise their use of ocean plastics as a better alternative - or an '*eco-innovative replacement*' - for virgin plastic, and several companies market regenerated nylon made from fishing nets and other waste. Such an approach only deals with the aftermath of the plastic-pollution problem, and does very little to curtail the plastics crisis at the source.

Microplastics remain a blind spot for the fashion industry

- Brands' approaches to the growing impact of microplastics on the environment and human health is largely delay-distract-derail; most companies stick to business as usual until '*more research*' is done. Most brands only consider end-of-pipe solutions - such as washing-machine filters and wastewater-treatment plants - which merely shift the problem elsewhere. Some brands have joined industry initiatives to develop unified measuring methods.

Online shopping: All style, no substance

In our sweep of online shops, we analysed 4,028 products in the Spring/Summer 2021 collections of ASOS, Boohoo, Forever21, George at Asda, Gucci, H&M, Louis Vuitton, Marks and Spencer (M&S), Uniqlo, Walmart, Zalando and Zara. The findings lay bare the proliferation of synthetic fibres in our clothes, with 67% containing some type of synthetics. On average, garments containing these fibres consisted of 53% synthetic composition.

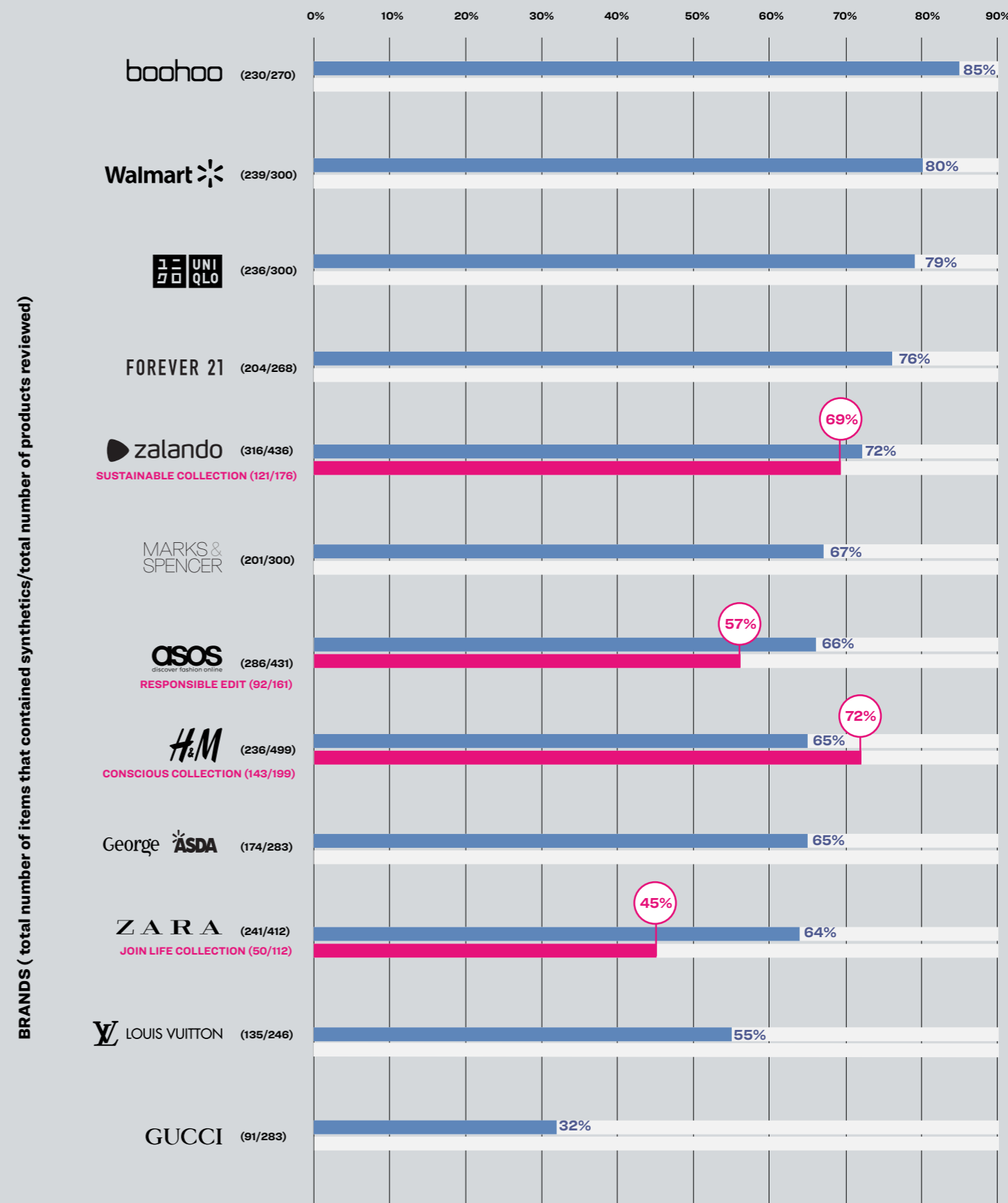
Riddled with greenwashing

- Our research found that greenwashing is rife: The majority of brands made sustainability claims, and 39% of the products studied had a green claim attached to them. A closer look at brands' policies, targets and commitments revealed that greenwashing is clearly this season's hottest trend.
- Using the UK Competition and Markets Authority's new guidelines on green claims, we found that, of the 39% of products accompanied by a sustainability claim, a shocking 59% flouted green-claims guidelines in some way.
- Brands' scores varied significantly on this front. Zara and Gucci made the fewest claims in contravention of the guidance; on the other end of the spectrum, 96% of H&M's claims, 89% of ASOS's and 88% of M&S's flouted the guidelines in some way.
- Our findings highlight the scale of the problem, and should be considered against the backdrop of increasing consumer mistrust of brands' sustainability claims - only 18% of UK shoppers reportedly trust the sustainability information brands provide.³ As such, our research shows the timeliness of the EU Commission's and other government bodies' plans to clamp down through legislation.
- Throughout this report, we present *Greenwashing Alerts* - examples of egregious greenwashing in which a brand markets a product as sustainable despite that product containing glaringly unsustainable elements. These included clothes claimed to be monomaterial or recyclable that are actually made from blended synthetics impossible to separate; garments tagged 'responsible' - with no explanation - yet containing blends of up to seven different types of fibre; and products made from 100% polyester, with no sustainability credentials, that are nonetheless included in a 'sustainability' collection.

Conscious collections not addressing fossil fashion

- Four of the brands had dedicated 'sustainable', 'conscious' or 'responsible' collections, but our research reveals that synthetics - particularly polyester - remain omnipresent in these collections.
- H&M's Conscious Collection actually contains a *higher* percentage of synthetics than its main collection (72% versus 61%, respectively).
- Zalando also uses a higher amount of polyester per garment in its sustainable range than its main collection. Considering these fibres are fossil-fuel based, this is highly incongruous with the green label applied to the collection.
- Of the products analysed across all brands, 6% contained recycled synthetics coming from PET bottles, yet - despite the lack of true circularity for recycled synthetics - this was brands' primary (token) gesture towards synthetics' sustainability.

NUMBER AND % OF ITEMS THAT CONTAINED SYNTHETICS FOR EACH BRAND



% OF ITEMS THAT CONTAINED SYNTHETICS IN SUSTAINABLE COLLECTIONS

OVERALL % OF ITEMS THAT CONTAINED SYNTHETICS PER BRAND

Why legislation is needed

Our report clearly demonstrates that the fashion industry's addiction to synthetics is glaring - and will inevitably worsen, as no brand has made a clear commitment to changing course. Instead of addressing the root of the problem - curtailing plastic-fibre overproduction at source - fashion companies continue to rely on delaying and distraction tactics, including greenwashing their questionable products to consumers. This is why it is more urgent than ever for policymakers to step up and find effective legislative solutions to put the fashion industry on a more sustainable track.

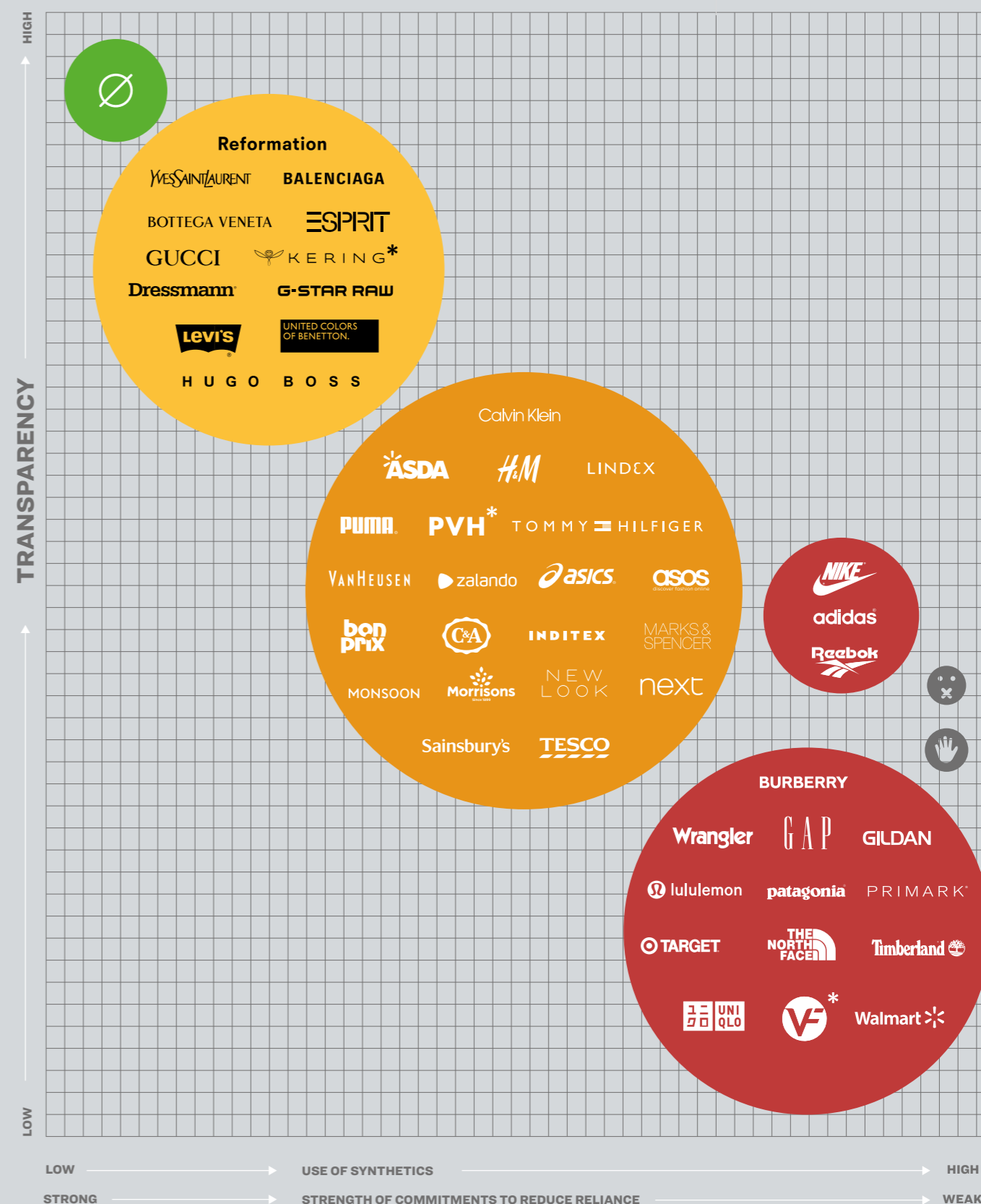
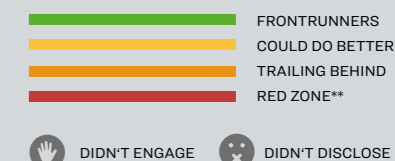
Policymakers must take measures to break the vicious cycle of cheap, synthetic material reliance and ensure the industry shifts to responsible production based on the principles of a truly circular economy. The upcoming EU textile strategy presents a significant opportunity to do this. The European Commission should commit to addressing the excesses of the fast-fashion model, which is inherently unsustainable. The Commission should introduce Extended Producer Responsibility (EPR) schemes, with mandatory and ambitious ecodesign measures, and brands must become responsible for the end of life of their products - which should be separately collected, reused, repaired and ultimately recycled in a viable, environmentally benign, fibre-to-fibre process.

We also need EU regulation on green claims, as our investigation confirms that, in the Wild West of greenwashing, brands are currently getting away with making a sea of misleading claims that go entirely unchallenged. The European Commission is currently working on 'Empowering Consumers for the Green Transition' and 'Substantiating Green Claims',⁴ two new legislative initiatives that should include measures to avoid greenwashing and make sustainability claims more reliable. The Commission should propose mandatory rules to address misleading claims.

The commission should also pay special attention to increasing supply-chain transparency and oblige companies to adopt due diligence with regards to human rights and environmental violations.

Specific recommendations for the European Commission, fashion brands, retailers and consumers are available at the end of this report.

Where do brands stand on transparency, use of synthetic fibres and commitments to phase them out?



This is a simplified representation of companies' performance and not a ranking. More detailed information is available in the league table in Annex II.
 * Parent groups VF Corporation, PVH Corporation and Kering are included for references purposes only, because they replied on behalf of their brands or policies are set at the group level.
 **Many brands in the Red zone landed there due to lack of transparency and disclosure, rather than necessarily high use.

- 1 Tecnon Orbichem (2021) 'World synthetic fibres'. S/Db-CHEM Market Overview.
- 2 Remy, D., Speelman, E. and Swartz, S. (2016) 'Style that's sustainable: A new fast-fashion formula'. McKinsey & Company, 20 October. [ONLINE] Available at: <https://www.mckinsey.com/business-functions/sustainability/our-insights/style-thats-sustainable-a-new-fast-fashion-formula>.
- 3 Changing Markets Foundation (2018) 'Majority of UK public feel clothing brands should be responsible for supply chain impacts'. [Press Release] 10 January. [ONLINE] Available at: http://changingmarkets.org/wp-content/uploads/2019/01/UK_SUSFASHION_PR_FINAL.pdf.
- 4 European Environmental Bureau (2020) EEB draft feedback: Empowering the consumer for the green transition, 1 September. [ONLINE] Available at: <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12467-Empowering-the-consumer-for-the-green-transition/F547532>.

STAND
earth

**Clean
Clothes
Campaign**

 **Changing Markets**
FOUNDATION


RETORNA

PLASTIC
SOUP FOUNDATION

NO PLASTIC

IN MY SEA

**FASHION
REVOLUTION**