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RESEARCH SUMMARY

Cost savings at the heart of pre-consumer textile waste reduction

In 2012, Redress and The Hong Kong Design Institute conducted research on how to profitably reuse pre-consumer textile waste¹ in Hong Kong's fashion industry supply chain, in ways that minimise negative environmental impacts. The research indicates that fashion and textile companies' concerns for their bottom line determine how they manage their pre-consumer textile waste.

"The research proves that money is the main driver in the battle to reduce pre-consumer textile waste. It shows that designers and retailers are lagging behind in this sector and are missing out on increasing consumer demand for recycled pre-consumer textile fashion," said Christina Dean, Founder and CEO of Redress.

The primary research aimed to understand stakeholders' interests, practices, and motivations towards reusing textile waste. The five target groups were fashion designers, textile manufacturers, garment manufacturers, apparel retailers, and consumers in Hong Kong and the Pearl River Delta economic region. Only companies with head offices in Hong Kong participated in the research while foreign companies with satellite offices in Hong Kong were excluded.

A separate survey was conducted in the five target groups with 57 fashion designers, 48 textile manufacturers, 46 garment manufacturers, 64 retailers, and 380 consumer respondents. Additionally a focus group consisting of four to eight participants was conducted with the five target groups.

Economic savings more important than environmental savings

The survey findings suggest that cost savings is the main motivator for reuse for stakeholders in Hong Kong's fashion supply chain.

67% of the *fashion designer respondents* were very concerned about the operational costs of introducing pre-consumer textile waste management policies, but at the same time, 73% of fashion designers were most motivated to try to reuse pre-consumer textile waste as a way to save costs.

33% of the *retailer respondents* were very concerned about the operational costs of introducing pre-consumer textile waste management policies, but at the same time 43% of retailers were most motivated to reuse textile waste as a way to save costs.

72% of the *garment manufacturer respondents* cited that their main motivation for reusing textile waste was to generate cost savings. Only 14% of garment manufacturers said that environmental impact had a strong influence on their company's pre-consumer textile waste management decisions.

Manufacturers leading the way over fashion designers and retailers

The survey suggests that manufacturers are more driven to reduce textile waste than designers and retailers in Hong Kong.

¹ Within the confines of this research, pre-consumer textile waste is defined as "textile waste in the fashion supply chain that has been discarded before reaching the consumer". This includes: waste that is generated by processing or producing any kind of fibres, yarns and textiles; off-cuts; selvages; shearings; end-of-role textiles; swatches; damaged or rejected garments and textiles; unsold finished clothing and samples. Excluded is the reutilization of materials such as rework, regrind or scrap textile generated in a manufacturing process and capable of being reclaimed within the same process. Source: Kerry Caulfield, 2009. Discussion paper: Sources of Textile Waste in Australia. [online] [Accessed 7 March 2012]. Textile Exchange, 2012. Global Recycle Standard. [online] [Accessed 18 June 2012].

48% of the *textile manufacturer* respondents were actively producing textiles made from recycled materials, with only 4% of the *textile manufacturer respondents* not currently engaged in any environmentally sustainable production practices.

This is in contrast with fashion designers and retailers, who are not so advanced.

67% of the *fashion designer respondents* said their company either does not currently engage in or they are not aware of any sustainable design activities. 54% of the designers did not know whether their company had ever designed clothing or textile accessories using recycled textiles.

In *retail*, 38% of respondents did not know if their company was engaged in any environmentally sustainable business practices. 52% of the *retailer* respondents stated that they did not know which step or steps in their retail company's operations generated the most pre-consumer textile waste. 63% were not aware if their company had ever retailed products made from recycled textiles.

Hong Kong consumers prefer 'new' textile waste

A majority of consumers preferred sustainable clothing made using up-cycled pre-consumer textile waste. The consumer respondents showed a preference for buying pre-consumer textile waste clothing because they believe these clothes are more hygienic (as they have not been worn by someone else), because it is easier to ensure lack of contaminants in the textile, and because they believe that making new clothing using pre-consumer textile waste leads to waste reduction at the source.

The research found that 82% of the *consumer* respondents would prefer to buy clothing made from pre-consumer textile waste as opposed to clothing made from post-consumer textile waste.

But despite this, consumers are not being offered enough access to desirable products.

53% of *consumers* stated that a larger selection of fashionable styles would strongly motivate them to purchase more fashion products made from recycled pre-consumer textile waste.

Consumer focus group participants stated that they are willing to spend extra money on clothing made from pre-consumer textile waste, if the environmental benefits of reusing pre-consumer textile waste were clearly communicated to them. This is at odds with the designer, textile manufacturer, garment manufacturer, and retailer focus group participants who said that lack of consumer demand and awareness was a main barrier for the reuse of pre-consumer textile waste.

From this, there appears to be a level of disconnect between the consumers' demand and the industry's perceived need for supply.

For more information about the research contact Redress on info@redress.com.hk.

About Redress (www.redress.com.hk)

Redress is a Hong Kong based NGO with a mission to promote environmental sustainability in the fashion industry by reducing textile waste, pollution, water and energy consumption. They achieve this via educational sustainable fashion shows, exhibitions, competitions, seminars, research, certifications and media outreach. Their unique profile allows them to collaborate with a wide range of stakeholders, including multiple fashion designers, garment and textile manufacturers, fashion retailers, secondary schools and universities, multilateral organizations, government, NGOs, financial institutions and media organizations.

About The Hong Kong Design Institute (HKDI) (www.hkdi.edu.hk)

The HKDI is a leading design education institution in Hong Kong under the VTC group providing quality education that cultivates knowledge, professionalism and new talents for the evolving creative industries. The Department of Fashion and Image Design (FID), in collaboration with professionals in industry, has developed a range of lively and relevant programmes including Fashion Design, Fashion Image Design and Fashion Business to meet the demands of this fast-paced, exciting global industry. Their mission is to nurturing design talents with critical thinking, cultural sensitivity, social responsibility and an international perspective.

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