



Circular Fashion Innovation Network Interim Report

One Year of Convening, Listening and Testing

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Executive summary

The UK fashion and textile industry stands at a pivotal moment, faced with extraordinary opportunities and tough challenges.

Global markets are evolving rapidly, driven by sustainability demands, technology transformation and supply chain volatility. The UK must adapt swiftly to remain competitive and sustainable.

The Circular Fashion Innovation Network (CFIN), led by the British Fashion Council (BFC) and the UK Fashion & Textile Association (UKFT), was established 12 months ago to help drive this transformation, with a clear mission: **To accelerate the UK towards a circular fashion ecosystem by 2032.** We have spent the last year engaging with industry stakeholders, gathering insights and working on initiatives to support this ambitious goal.

This interim report highlights insights, updates and next steps in three areas: **Circular Business Models (CBMs), Sustainable Manufacturing and Recycling Infrastructure.** These key areas form the foundation of CFIN's strategy to drive the UK fashion and textile sector to a more innovative, sustainable and economically vibrant future.

CBMs

The fashion and textiles industry demonstrates a strong intention towards circularity, with CFIN's research showing 81% of organisations include CBMs in their five-year strategy. However, a significant gap exists between ambition and implementation, with 63% of existing customer-facing CBMs in a low-maturity pilot phase. The primary barrier to scaling these initiatives is financial viability, alongside challenges in customer communication and demand.

These findings highlight the need for substantial support to overcome financial, operational, and market-related challenges, ensuring circular initiatives become both viable and scalable. Various interventions are needed to help bridge the gap between circular goals as an industry and enabling practical implementation for continued economic and environmental success. This includes scaling circular design approach across business operations, which will meet the latter with additional benefit to prepare brands for upcoming regulation and play a role in outward communications to existing customers and as a potential acquisition tool.

Through extensive industry engagement, CFIN has some key next steps to help drive this change:

- Identify how existing EU regulations will apply to UK business, which can drive business change through legislation compliance on eco-design¹ products and Extended Producer Responsibility (EPR)².
- Develop an accelerator programme to support the scaling of CBMs, which is holistic in approach with Sustainable Manufacturing and Recycling Infrastructure.

- Identify a harmonised approach to how brands and retailers communicate with customer base on sustainable fashion, including circular design and business models.
- Identify the government interventions required, in the form of financial incentives and policy, in order to drive the right behaviours.



This report underscores the transformative journey our industry is undertaking. By bringing together diverse stakeholders and fostering collaboration, CFIN is accelerating our transition to a circular fashion ecosystem. The insights presented here not only challenge our current systems but also illuminate the path forward. As we continue to innovate and adapt, I'm confident that the UK fashion industry will emerge as a global leader in sustainable and circular practices, setting new standards for economic viability and environmental responsibility.



Caroline Rush CBE, CEO, British Fashion Council

Photo credit: Chylak



Sustainable manufacturing

The UK fashion and textile manufacturing sector has a unique opportunity to lead the sustainability transformation through innovation, technology, upskilling and circularity. Advanced technologies like artificial intelligence (AI), automation and robotics can reshape the industry by offering on-demand capabilities and improving efficiency and quality.

A key opportunity lies in aligning UK manufacturing capacity with volume retail demand. By strategically increasing production capabilities, the UK can reduce reliance on imports, shorten supply chains, and enhance responsiveness to market trends. To address this opportunity, the concept of a sustainable apparel manufacturing park emerges, serving as a hub for sustainable manufacturing practices, bringing together advanced technologies, skilled workers, and circular production methods under one roof.

The innovation landscape in sustainable manufacturing is flourishing. Promising models like local denim finishing and reprocessing, integrated repair labs, dye recycling, and AI-enabled factory technology are paving the way for more agile and circular production methods.

These emerging areas of sustainable fashion and textile manufacturing present a tremendous opportunity for the UK fashion and textiles industry. By continuing to develop and implement these advanced technologies and more circular production methods, the UK can become a global leader in sustainable fashion manufacturing. This shift towards more sustainable practices not only addresses critical environmental concerns but also opens new avenues for economic growth, job creation and increased competitiveness in the global market.

The next steps the CFIN programme will take in Sustainable Manufacturing include:

- Continuing exploration of technological innovations and their integration into UK manufacturing supply-chains, particularly in AI, automation, and robotics.
- Exploring the potential of increasing volume apparel manufacturing capacity through volume apparel infrastructure.
- Establishing collaborations between manufacturers, innovators and key industry stakeholders to drive sustainable transformation.
- Exploring minimum compliance requirements to manufacture in the UK.



This report highlights how we've been working to bring the entire industry together to start building a circular fashion ecosystem here in the UK. After a year, we've made some real progress and taken practical steps forward, but more importantly, we've brought together all parts of the supply chain. We're looking at all aspects, from recycling and manufacturing to new business models, and considering everything from policies to sourcing and technology. This isn't just about solving the challenges in our sector – it's also about creating new opportunities for growth, efficiency and sustainability across the whole industry.



**Adam Mansell, CEO,
UK Fashion and Textile Association**



Recycling infrastructure

The UK's textile recycling landscape presents a significant opportunity for development. With approximately 1.45 million tonnes of post-consumer textiles generated annually in the UK³, there is considerable potential to create an effective recycling ecosystem. This presents a socio-economic opportunity to capture the value of these textiles, generate environmental benefits, and contribute to economic growth and job creation.

Developing a robust textile recycling infrastructure necessitates immediate attention to several critical areas. These include implementing supportive policy frameworks, stimulating demand for recycled materials, consumer awareness and education, and enhancing technical innovation within the textile recycling sector.

The potential of technological advancements, particularly in automated sorting technologies and innovative textile recycling processes, could transform the sector's capabilities and the potential of capturing value of non-reusable textiles.

The next steps for CFIN's Recycling Infrastructure activities will include:

- Create a comprehensive National Textile Recycling Infrastructure Plan.
- Develop a socio-economic impact analysis of developing a National Textile Recycling Infrastructure.
- Advocate for EPR schemes in the UK textile industry and broader policy mechanisms, to help finance recycling infrastructure.

- Foster cross-sector collaboration to drive textile recycling innovation.

The insights presented in this report provide a foundation for collaborative action among industry stakeholders, government bodies, and funders.

By focusing on these key areas, the UK can position itself as a global leader in circular fashion, addressing both environmental concerns and economic opportunities.

Next steps for the CFIN programme

The steps outlined above will shape CFIN's full report, due in May 2025, with comprehensive recommendations for industry and government.

The transition to a circular fashion ecosystem in the UK requires collective effort and commitment from all stakeholders. We call upon everyone in the industry — from designers and manufacturers to retailers, consumers, policymakers, and innovators - to play their part in this crucial transformation. By embracing circular principles, investing in sustainable technologies, developing skills and fostering a culture of collaboration and innovation, we can create an ecosystem that is both environmentally responsible and economically vibrant.

The time to act is now.



The Circular Fashion Innovation Network serves as the cornerstone of UKRI's Circular Fashion Programme. As a vital forum uniting stakeholder across the fashion ecosystem, it plays a crucial role in driving the industry's transition towards circularity. This report highlights the significant progress made to date and offers valuable insights that will directly inform our innovation roadmap and guide future initiatives.



Tom Fiddian, Head of AI and Data Economy Programmes, Innovate UK

Chapter 1

Introduction



Programme overview

Imagine a fashion and textiles industry where every garment is made to last, where waste is transformed into new clothing or new resources, and where economic growth goes hand in hand with environmental stewardship.

This vision is not merely aspirational; it's the strategic imperative that CFIN is actively working towards with stakeholders from across the UK fashion and textile sector.

The UK fashion and textile industry is a powerhouse of creativity and economic vitality. It contributes an estimated £62 billion to the GDP and supporting over 1.3 million jobs⁴. The sector faces significant challenges, including the production of 1.4 million tonnes of textiles waste annually. But it also presents remarkable opportunities for innovation, technology adoption, and growth.

Launched in 2023, CFIN is a key component of the £15 million UK Research and Innovation (UKRI) Circular Fashion programme⁵. CFIN unites expertise from across the fashion and textile sector, including brands, retailers, manufacturers, recyclers, innovators, academia, and NGOs. Our aim is to accelerate the UK towards a circular fashion ecosystem by 2032, supporting the goal to make the UK the fastest transitioning economy to Net Zero⁶.

CFIN's objectives are to:

- **Establish a network of organisations that are aligned to and jointly working towards a circular fashion ecosystem in the UK.**

- **Increase knowledge transfer by showcasing practical ways to embed circularity and providing forums for industry and academia to come together to overcome challenges.**
- **Establish key recommendations across the six themes, broken down by segment where possible, showing what industry needs to do to achieve circularity.**
- **Determine government interventions required to enable the adoption and scaling of circular practices.**
- **Establish the business case for the advancement of a circular fashion ecosystem from June 2025 onwards.**

CFIN serves as the collective voice of the fashion industry, providing a unique platform for collaboration across the entire value chain. By bringing together this ecosystem of stakeholders, CFIN fosters an inclusive environment that enables the development of practical, innovative, and scalable solutions for a more sustainable and circular fashion ecosystem.

Since our inception, we have engaged this diverse community through workshops, pilots, working groups, webinars, and other knowledge exchange initiatives, underscoring each stakeholder's crucial role in addressing the complex challenges of circularity. This collective endeavor harnesses the unique strengths and perspectives of each participant, driving the transition to a circular fashion and textiles economy.

Central to our approach is the Circular Fashion Ecosystem Target State, which visually represents the key actors, processes, and flows within the fashion and textiles industry. This infographic (below) serves as a framework for understanding the complex interactions and interdependencies that shape the industry and highlights the critical areas where interventions can drive the transition towards circularity.

CFIN encompasses six themes, which can be categorised into three priority themes and three enabling themes. This Interim Report concentrates on the three priority themes: CBMs, Sustainable Manufacturing, and Recycling Infrastructure. Each of these themes is explored in depth, presenting our programme insights, identified barriers and opportunities, and proposed next steps.

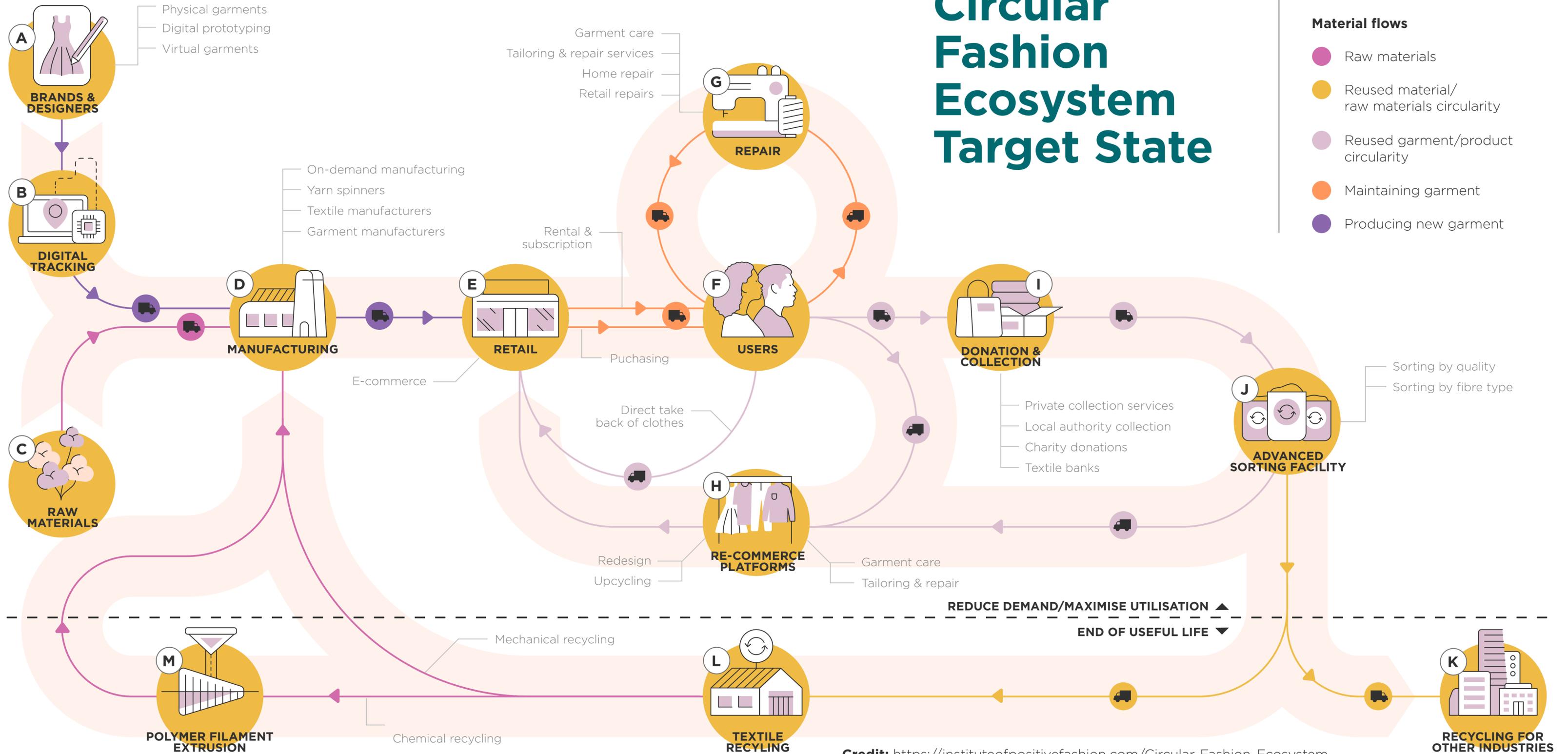
While the report focuses primarily on these key pillars, it also acknowledges the crucial role of the three enabling themes: Novel Technology, Diverse & Future-proof Workforce, and Green Growth. As the programme progresses, we will increasingly direct our attention towards these enabling themes, ensuring a comprehensive approach that will be reflected in our full programme report published in May 2025.

Through this report, CFIN aims to showcase the progress and potential for circularity in the UK fashion industry, while addressing the challenges ahead. Together, we can create a circular fashion ecosystem that not only sustains our planet but also fuels innovation, drives economic growth, and sets new standards for the UK sector.

The future of fashion is here, and it's circular.



Programme overview



Chapter 2

Circular Business Models



Introduction and definition

For this report, we define CBMs as:

Business models, such as clothing rental or subscription schemes, that minimise the material used and waste produced while maximising the value of materials and products by keeping them in use for as long as possible, if not permanently. These models promote a focus on the triple bottom line – people, planet and profit⁷.

It's crucial to note that CBMs, like any business model, must be economically viable. They represent ways for businesses to make money by replacing traditional linear models with circular alternatives. The goal is to create a system where sustainability and economic strength go hand in hand. Research⁸ shows there is a potential mainstream market for all CBMs, with between 40% to 58% of UK citizens likely to engage with circular models. Furthermore, among those who have already engaged with a CBM (or similar), the majority say they would do so again.

In the context of the fashion and textile industry, we focus on five key CBMs that are reshaping the UK landscape:

While not a CBM, the consideration of circular design principles is critical in enabling each of the models described above.

Circular design is described as: Incorporating sustainability principles from the outset, designing products for longevity, recyclability, and reduced environmental impact throughout their lifecycle.



Resale: Extending the life of pre-loved garments by facilitating their sale to new owners. This model breathes new life into products, allowing multiple use cycles.



Repair: Offering services to mend and restore clothing, thereby extending product lifespans and challenging the throwaway culture prevalent in fast fashion.



Rental: Redefining ownership in fashion by offering access over possession, allowing consumers to enjoy a wide range of styles without the burden of permanent ownership.



Remake: Transforming potential waste materials or unwanted products into new, higher-value products. This creative approach showcases the potential for innovation in sustainable design.



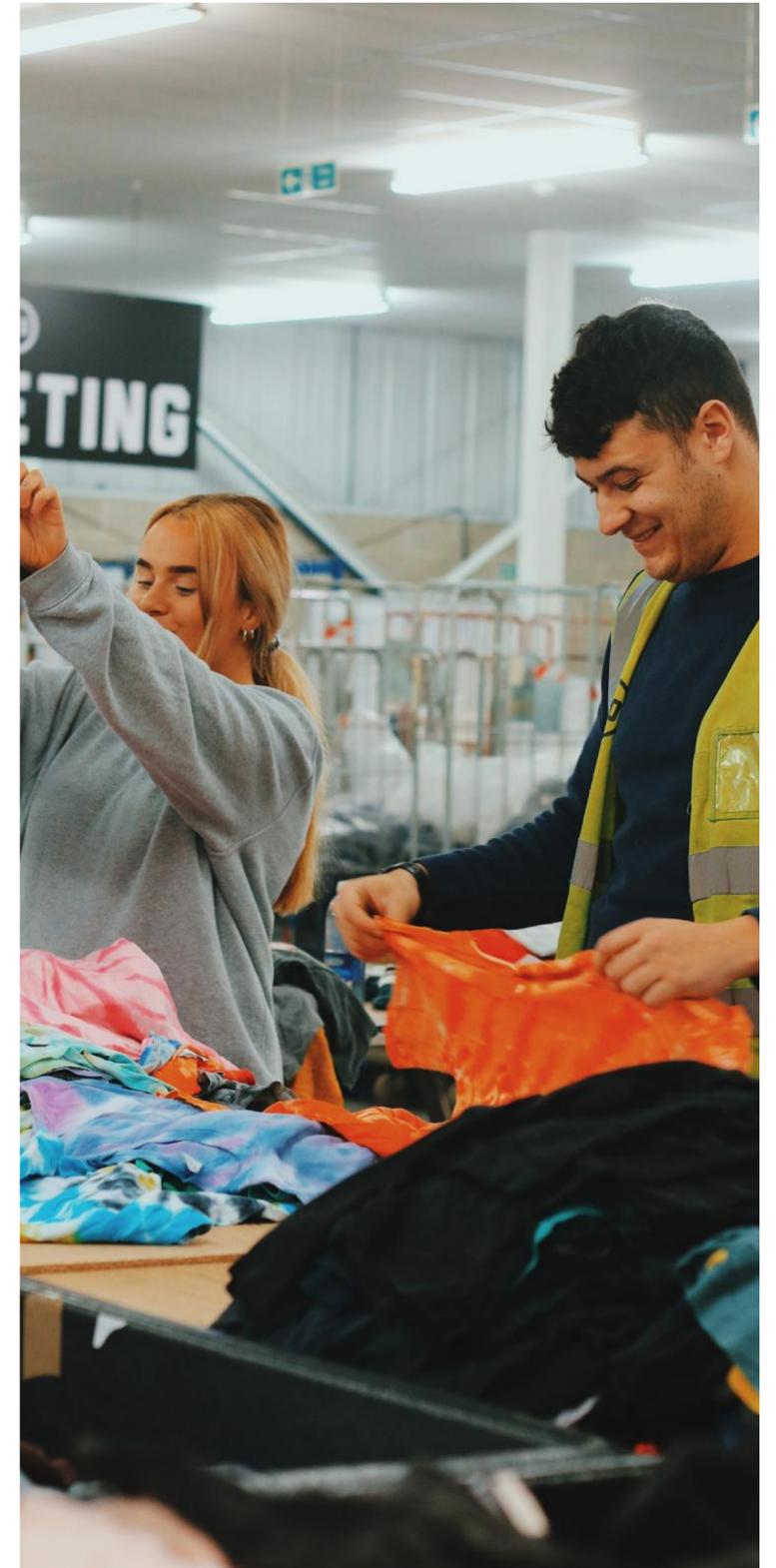
Takebacks: Implementing systems for collecting used garments from consumers, enabling their reuse, recycling, or proper disposal.

Surveying the UK fashion industry

To understand the current state of CBMs in the UK fashion industry, CFIN partnered with Newton Europe to conduct a comprehensive survey. Our survey engaged with a diverse range of respondents from across the UK brands and retailers. Participants included representatives from high street retail, brands, sustainable fashion initiatives, and online retailers. This broad spectrum of contributors provides valuable insights from a significant cross-section of the industry.

CFIN research shows 47% of UK brands and retailers embed circular design principles in their product ranges, which increased to more than 70% of premium and luxury brands.

Notably, 70% of product ranges have at least one circular design attribute. However, the research also highlighted a lack of industry-wide alignment on a definition of a 'circular product'. Less than half of the organisations embedding circular principles have a definition for a circular product, suggesting a need for standardisation and clearer guidelines.





Why are CBMs important?

Adopting CBMs in fashion is an economic and environmental imperative. The potential benefits are both far-reaching and multifaceted:

Environmental impact: Research indicates that extending the active life of 50% of UK clothing by just nine months could reduce carbon and water footprints by around 20-30% each⁹.

Regulatory readiness: As governments worldwide tighten environmental regulations, CBMs position businesses ahead of the curve. By adopting circular practices now, fashion and textiles businesses can prepare for future legislation and potentially shape industry standards.

Mitigation of business risk: As resource scarcity and rising costs is increasingly a real issue¹⁰, diversifying away from making products from virgin materials to business revenue driven by more circular products and services.

Current landscape and adoption

CBM adoption in the UK fashion industry

The survey revealed that 81% of organisations have included circularity as part of their five-year strategy, demonstrating a strong industry-wide commitment to sustainable practices, while 66% of organisations have already implemented at least one circular initiative. However, the maturity of these initiatives varies significantly, with 63% of customer-facing CBMs still considered as being in a low-maturity pilot phase.

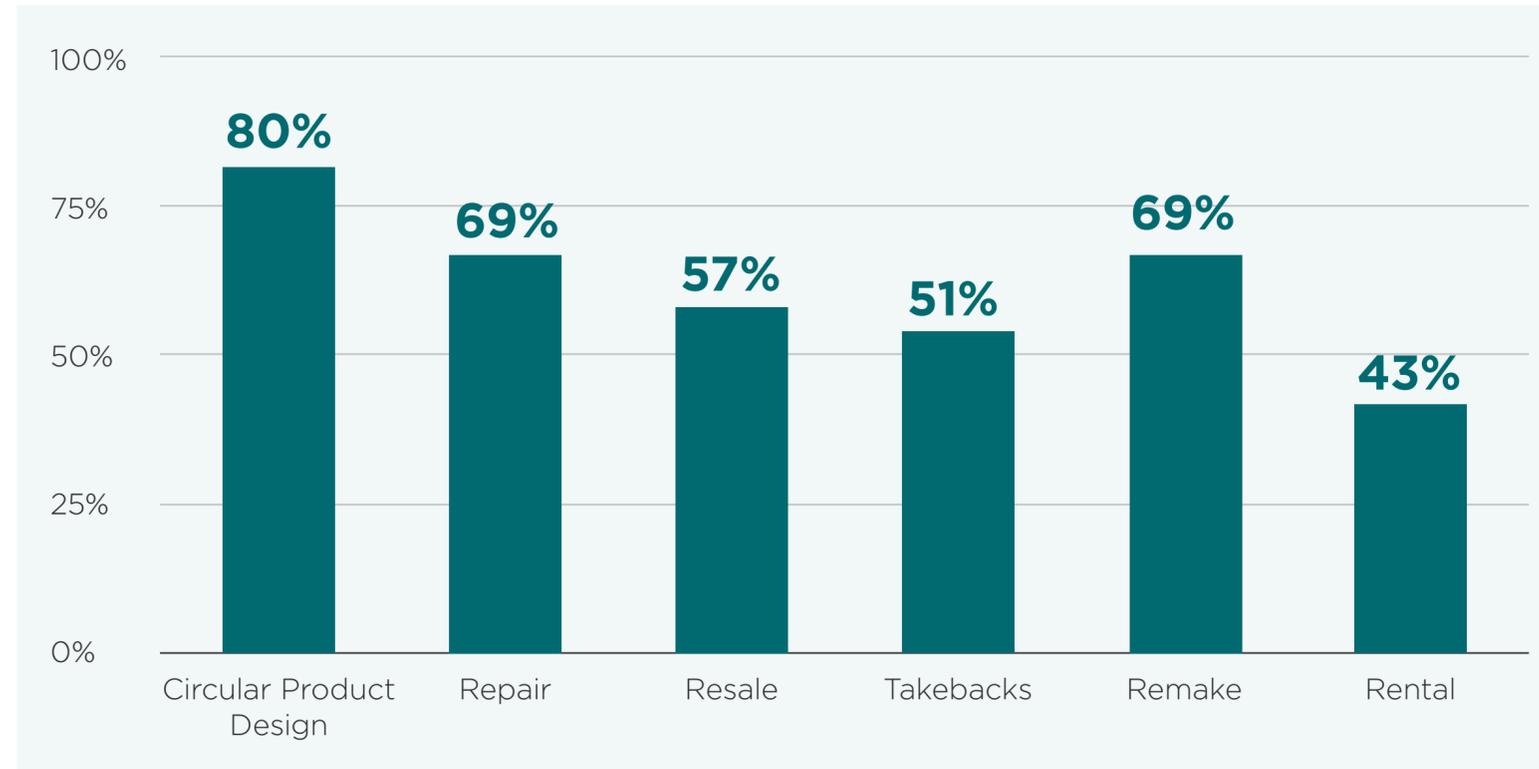
Circular product design was the most widely adopted or considered initiative, indicating a growing focus on embedding sustainability at the product creation stage. The relatively high repair and resale adoption rates suggest these are seen as more feasible initial steps towards circularity.

Maturity of CBM initiatives

While adoption rates are promising, the maturity of these initiatives varies. Responses show 63% of customer-facing CBMs are still in a low-maturity pilot phase. This statistic highlights a critical gap between intention and full-scale implementation.

Adoption rates for specific CBMs (already adopted or high likelihood)

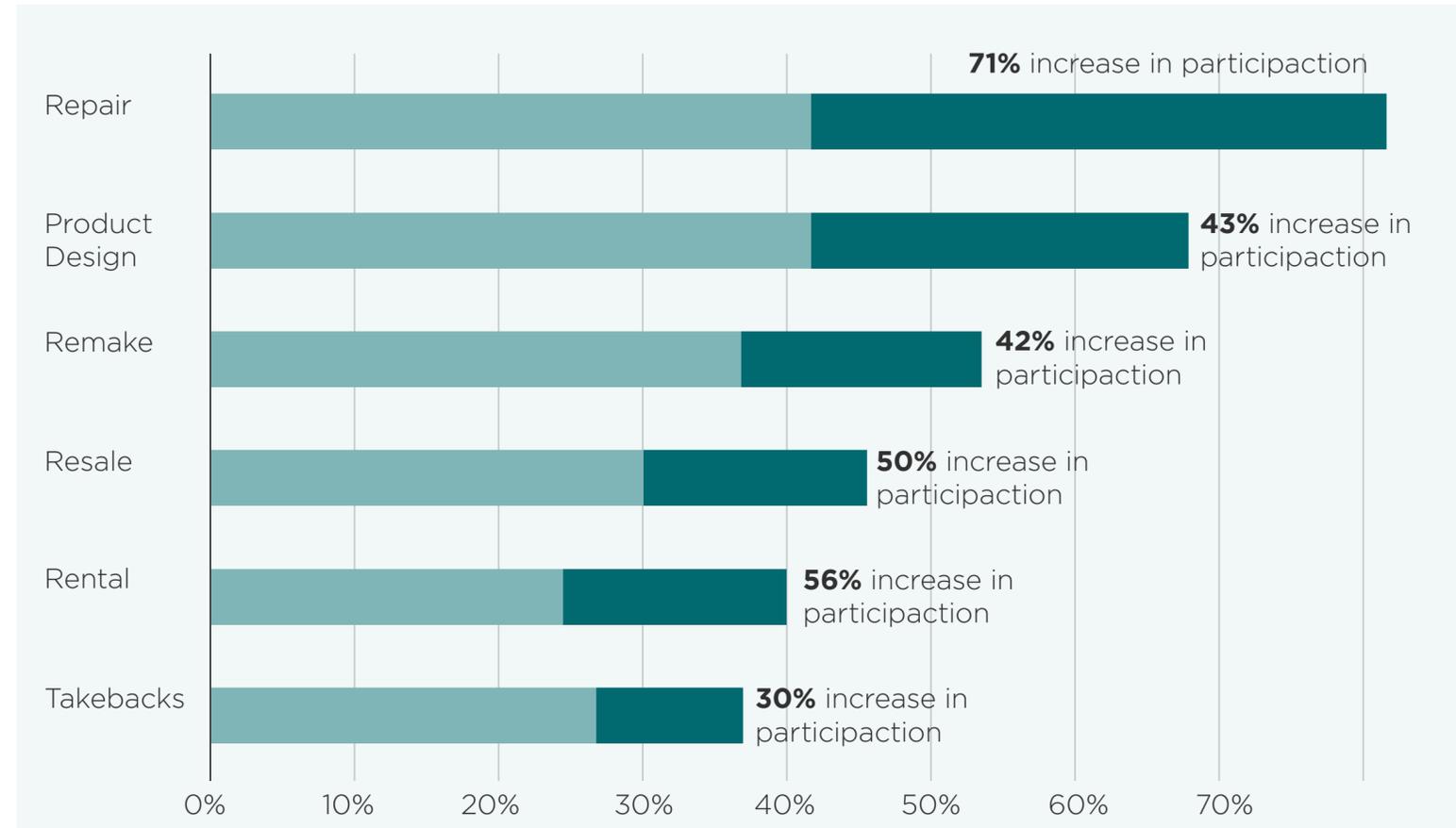
CFIN investigated the adoption rates and likelihood of adopting CBMs and circular designs by organisations that say circularity is part of their five-year strategy. It revealed the following.



Current landscape and adoption

Current CBM participation vs future plans

Despite challenges, the industry shows a strong intention to grow CBM participation. The survey indicates significant planned increases in adoption across all CBM types:



Key: ■ Current ■ Future

Key differences between market segments

The survey indicates that repair services are more prevalent in this segment compared to mid-market and value segments. By comparison, takeback schemes are more popular among mid-market and value retailers compared to premium and luxury brands.

Regulation

The regulatory environment plays a significant role in future adoption, with 52% of respondents indicating that regulatory requirements could be supportive in scaling circular initiatives.



Photo credit: Rejiina Pyo

Challenges and barriers to scaling CBMs



The following section outlines the key barriers identified, providing insights into the complexities of transitioning to circular models in the fashion industry.

Limited financial margin and revenue opportunity

Approximately 50% of respondents cited this as the biggest challenge to scaling circular initiatives. This barrier is particularly pronounced for initiatives like rental and resale, where the financial model differs significantly from traditional retail. The survey found that revenue is the most commonly tracked key performance indicator (KPI) for circular initiatives, followed by customer participation. This is driven by a noticeable disconnect between customer sentiment and behaviour.

While consumers express interest in sustainable products, they are unwilling to pay a premium for circular products, necessitating competitive pricing. The survey suggests this creates a significant hurdle for many organisations trying to maintain profitability whilst transitioning to circular models, as the willingness for customers to pay a premium for renting an item or purchasing a pre-owned or remade model is yet to be understood.

Customer communication

Approximately four in ten brands and retailers said they struggle to effectively communicate circular initiatives to customers. This points to a potential gap between industry efforts and consumer awareness or understanding on sustainable fashion products and services. Effective communication is crucial not only for the success of individual initiatives but also for driving broader societal shifts towards sustainable consumption.

Insufficient customer demand

This was the third most common to scaling CBMs, at almost 30% and particularly challenging for initiatives like remake and rental. The data suggests a potential mismatch between industry offerings and current consumer behaviours or preferences, highlighting the need for both consumer education and possibly the refinement of circular offerings to better meet customer needs.

Marketing challenges

29% of respondents have accessed marketing or PR support, but only 33% said they would like further support in this area. Organisations report low returns on investment for marketing efforts related to circular initiatives, making it difficult to secure consistent funding. Additionally, fears of potential greenwashing accusations can hinder communication efforts, creating a challenging balance between promoting initiatives and avoiding reputational risks.

Operational and logistical complexity

67% of circular initiatives involve partnerships with third-party organisations, yet only 21% of respondents believe that further third-party operational support would aid scaling. Many organisations already find it difficult to integrate circular models into existing business operations. This challenge underscores the systemic nature of the shift towards circularity, which often requires rethinking entire supply chains and operational processes.

Supply chain complexities

For circular product design, issues with supplier transparency and complexities in managing sustainable supply chains pose significant challenges. Organisations are having to contend

with transparency issues in their supply chains, making it challenging to have confidence in the circularity of their products.

Lack of business capacity

This is mentioned as one of the top barriers to scaling circular initiatives, particularly for rental models. Some organisations report not having the internal resources or capabilities to scale circular initiatives. This barrier points to potential skills gaps within the industry and the need for capacity building to support the transition to circular models.

Increased material and operational costs

One in five brands and retailers who responded have accessed operational support, which is seen as less attractive going forward. Businesses said they incur additional costs throughout the value chain, as these newer circular models are often less optimised than traditional linear processes. Many initiatives are not currently benefiting from full economies of scale, either due to being in the pilot phase or being operated separately from core business.

These barriers highlight the complex nature of transitioning to circular models in the fashion industry. Addressing these challenges requires a collaborative effort across various stakeholders, including brands, retailers, consumers, policymakers, and third-party service providers. Whilst there is a strong intention to adopt circular models, significant obstacles remain in scaling these initiatives from pilot projects to full implementation.

Unlocking the potential of deadstock: CFIN's pilot with The Materialist

The fashion and textiles industry increasingly needs sustainable solutions, and deadstock fabrics present a compelling opportunity, where deadstock is defined as the unsold stock of a product. To explore this potential, CFIN partnered with The Materialist – a B2B marketplace for trading high-quality deadstock fabrics – to launch a physical pop-up showroom to sell surplus fabrics. The three-month pilot ran from May to July 2024, during which 5,000 varieties of high-quality deadstock fabrics were showcased in a showroom on Regent Street.

With support from Maeba International, a European deadstock supplier, and Quantis, an environmental sustainability consultancy, the initiative aimed at exploring, through the analysis of clients appointments and surveys data, the impact that a showroom for surplus textiles would have on the integration of deadstock fabrics into circular business practices, and the financial case for different market segments in investing in deadstock fabric, via client and visitors' surveys and datapactices

Key findings:

- One-third of visitors were new to deadstock and/or unfamiliar with The Materialist, highlighting the importance of a physical space to facilitate and advance the use of deadstock.

- The significant cost-effectiveness of deadstock: with 80% of showcased fabrics priced below £10 per metre, deadstock proves to be an accessible option for brands of all sizes.
- More than 80% of clients who purchased deadstock during the pilot programme declared to buy surplus textiles as part of their regular sourcing process, rather than one-off.
- 60% of orders came from brands purchasing smaller quantities (<50m), suggesting the physical showroom encouraged new buyers, foregoing the challenge of minimum order quantities.
- Companies explicitly referencing sustainability on their websites had a significantly higher average purchase (x3) than those who did not.
- Designer and Founder roles made disproportionately more purchases compared to
- their representation among visitors, indicating a need for targeted engagement with product roles.

A sustainable solution gaining traction

The pilot revealed the importance of a physical showroom in generating increased interest and changing perceptions towards deadstock fabrics, as 83% of The Materialist's clients during the pilot programme were first-time buyers. This enthusiasm translated into concrete intentions, with 67% of respondents

planning to incorporate deadstock into their regular sourcing process.

Breaking down barriers

The Materialist showroom, as a central space where brands could physically inspect the fabrics before committing to a purchase, were able to bypass traditional obstacles associated with deadstock, namely quality concerns and the inability to see the fabrics beforehand. Visitors had the opportunity to examine more than 5,000 high-quality deadstock fabrics, taking back an average of 30 fabric swatches each for consideration.

The financial case for deadstock

Perhaps the most compelling argument for deadstock is its cost-effectiveness. With 80% of showcased fabrics priced below £10 per metre, the pilot programme proved that deadstock presents an accessible option for brands of all sizes. Immediate availability, 10-metre minimum order, and a selection of articles with more 1ml metres further enhanced its appeal. The showroom pointed to the role that deadstock can play for brands and retailers across all market segments, as a tool to produce part of, as well as an entire collection.

Market segmentation insights

The pilot unveiled interesting trends across different market segments. Womenswear brands and companies with 2-10 employees showed the strongest interest, further instating the prevalence of sustainability practices within SMEs. However, the showroom also attracted high-volume purchasers (25% buying over 200 metres),

indicating that deadstock can also play a role in larger brands and retailers' scale production, even if it makes up a certain percentage of a brand's choice of materials.

Sustainability impact

Beyond cost savings, deadstock offers significant sustainability benefits. Notably the re-circulation of excess fabrics prevents surplus textiles from ending up in landfill, being incinerated, or being wasted. In particular, the majority of fabrics showcased during the pilot programme were recyclable, with over half of them being either mono-fibre or natural fiber.

Encouragingly, 82% of survey respondents were open to disclosing their use of deadstock in finished pieces, suggesting potential for consumer-facing sustainability messaging. 76% of respondents declared themselves open to selling or donating their own deadstock, highlighting that there is opportunity for more collaborative and circular practices through deadstock across the industry.

The CFIN pilot has demonstrated that deadstock is not just a viable option for fashion brands across all market segments, but a potentially transformative one. By presenting deadstock in new ways and challenging misconceptions of its use, the initiative has proved the value and the impact of raising awareness for deadstock can have, particularly in increased adoption for more sustainable materials across, as well as building a business and financial case for brands from all segments for increased adoption of sustainable materials.

A programme promoting CBMs and addressing challenges: The Low Carbon Transition Programme

The Low Carbon Transition (LCT) Programme led by the Institute of Positive Fashion at the British Fashion Council and funded through the Greater London Authority's UK Shared Prosperity Fund (UKSPF). Through the LCT Programme, the British Fashion Council is supporting 50 small-to-medium enterprises (SMEs) designers with ready-to-wear collections to baseline their carbon emissions and develop tangible, tailored low carbon transition plans to reduce their footprint across their supply chains.

In addition to this intervention, the programme also makes the connection between carbon and circularity by supporting each business to identify ways to make their business operations more in line with circular economy principles, and also to better understand their customers.

Circularity is incorporated as a core topic throughout the LCT Programme in a number of ways:

Introduction to circularity: Circularity is embedded from the outset. Designers are presented with key terms and case studies used to present the multitude of opportunities that embedding circularity offers, generating new streams of regular income and strengthening customer relationships.

Circular business models: One-to-one workshops focus on exploring decarbonisation and circularity opportunities for each individual designer business, in particular the feasibility of implementing circular business models such as repair, rental and resale.

Circular propositions: Support to develop a possible circularity proposition, which considers how it will align with business objectives as well as existing and future customers.

Customer surveys: A tool to gain deeper understanding of their customer base, specifically on behaviours and attitudes towards sustainable fashion in particular CBMs like repair, resale or rental. These insights can be used to inform which circularity opportunities could be explored or pursued.

Recycled materials: Materials masterclass sessions tailored to each business, to help each business explore the feasibility of using alternative, recycled, and more sustainable materials.



A programme promoting CBMs and addressing challenges: The Low Carbon Transition Programme

Emerging themes and insights from the LCT Programme

Key themes emerging from our interactions with brands in the programme include:

Materials choice as carbon hotspot and decarbonisation lever

Sourcing low-impact, circular materials is crucial for reducing the carbon footprint. Promoting recycled or renewable materials, such as regenerative cotton, can significantly decrease emissions. Brands can move towards a closed-loop system by prioritising materials that can be kept in circulation or safely returned to the environment. However, finding alternative materials that meet existing quality standards remains a significant barrier for many brands.

Minimum order quantities (MOQs) challenge SMEs and circularity

Overproduction is a significant challenge to circularity efforts in the UK fashion industry, driven by factors across the supply chain. With the large order quantities required by large retailers, the minimum order quantities manufacturers put in place are prohibitive for smaller brands. Some smaller brands face pressure to order more than needed to meet factory MOQs, especially with overseas manufacturers, potentially leading to excess inventory and increased environmental footprint. This challenge extends to eco-friendly materials, making sustainable practices adoption harder for SMEs.

Evolving Environmental Social Governance (ESG) regulatory landscape

The fashion industry is experiencing rapid evolution in ESG regulations, with increasing demands for transparency, accountability, and sustainability from governments, industry bodies, and consumers. Brands require support to navigate this complex landscape and ensure regulatory readiness. SMEs face additional challenges due to time and resource constraints. Key upcoming legislations, such as the Ecodesign for Sustainable Products Regulation (ESPR), will require brands to design durable, repairable, and recyclable products, and introducing Digital Product Passports (DPP).

Embedding circularity in design education

There's a growing understanding of the need to deeply integrate circularity principles - designing for longevity, reuse, and recyclability, as well as incorporating next-gen materials - in fashion design education, equipping future designers with knowledge about sustainable materials, waste reduction, and closed-loop production. This integration ensures that circularity becomes a core component of fashion development.



CBMS: NEXT STEPS

Our comprehensive industry survey, and wider engagement of the industry has provided critical insights into the current state and future potential of circular business models in the UK fashion and textile sector. Collectively the insights highlight complex challenges, including limited financial margins, customer communication barriers, and operational complexities. However, they also reveal significant opportunities for improvement as we work towards a more circular economy.

Based on these insights, CFIN has developed a focused action plan to address key areas and drive progress in circular business models. Our next steps are designed to build on the industry's strengths, address identified barriers, and create practical, scalable solutions for the UK fashion and textile sector.

1. Scaling circular design

Ecodesign readiness pilot

- Deliver a workshop with ten brands and retailers focused on recyclability, the use of recycled materials, durability and readiness for forthcoming regulation.
- Design a pilot programme focusing on Ecodesign Sustainable Products Regulation (ESPR) regulation compliance¹³.

2. Scaling CBMs

a. CBMs accelerator

- Design an accelerator programme to take cohorts of brands and retailers through to identify or optimise CBM implementation.
- Conduct industry consultations to refine accelerator focus.

b. Chief Marketing Officer (CMO) workshop

- Deliver a workshop to improve the alignment of language used when communicating sustainability aspects.
- -Help unlock positive customer engagement with circular business models.

- Support compliance with the Greens Claims Directive¹⁴.

c. Business readiness

- Determine key aspects to be considered when assessing circularity maturity and readiness.
- Test key aspects with select businesses and generate insights for dissemination.

3. Government interventions

- Identify key policy areas and options for scaling Circular Design and circular business models.
- Consult with legal and policy experts, including the Competition and Markets Authority.

These initiatives represent CFIN's commitment to driving tangible progress in circular business models within the UK fashion and textile industry. By focusing on scaling circular design, accelerating the adoption of circular business models, and developing policy recommendations, we aim to create a more sustainable and circular fashion ecosystem.



Case studies: circular fashion and textiles in action

The following case studies showcase how different companies in the UK fashion and textiles industry are implementing circular principles. From high-street retailers to luxury brands and innovative partnerships, these examples demonstrate the diverse approaches to creating a more sustainable and circular fashion ecosystem.



John Lewis Partnership

Circularity on multiple fronts



Photo credit: John Lewis Partnership

INTRODUCTION

John Lewis Partnership (JLP) has launched multiple circular business models initiatives and pilots across its operations in 2024. Catherine Loader, Sustainability Manager for Circular Economy at JLP, provides insights into the company's approach to circularity.

JLP's circular strategy encompasses several key initiatives:

Circular design collection: JLP aims for 100% of new John Lewis own-label products to be designed with circularity in mind by 2028. In 2023, they launched their first circular design collection, featuring five products created with principles of Materiality¹, Durability, and Recyclability.

Pre-loved handbags: An expanded partnership with luxury resale brand Sign of the Times now offers pre-loved handbags online and a permanent concession in the Peter Jones store.

In-store repair services: A repair trial, in collaboration with Timpsons, offers mending, restoring, and dry cleaning services in five John Lewis stores.

Pre-loved childrenswear: In collaboration with The Little Loop, JLP offers pre-loved childrenswear in its Oxford Street store.

Expanded rental offerings: JLP has broadened its online fashion rental service to include menswear alongside womenswear.

IMPLEMENTATION AND CHALLENGES

The implementation of these initiatives required extensive collaboration across various departments within JLP. Loader says: "Without collaboration, these projects would be very difficult to launch and scale up."

For the circular design collection, JLP adopted a co-creation approach, involving teams across John Lewis commercial, including design, buying, fabric sourcing, quality and technical, as well as members of the raw materials sustainability team.



We are encouraged to understand the value of products and materials, and to prolong the life of the products we buy.

IMPACT AND FUTURE OUTLOOK

JLP's circular initiatives are designed to meet multiple objectives, including gauging customer appetite and needs, understanding supply chain feasibility, and driving customer acquisition.

Loader sees significant potential for CBMs in the fashion industry: "It fundamentally changes the way we interact with the products and services we buy. We change from being customers to being product custodians. We are encouraged to understand the value of products and materials, and to prolong the life of the products we buy."

Looking ahead, JLP plans to scale up its circular design efforts across further product categories, building on the learnings from its initial collection. Loader advocates for policy support to accelerate change: "Providing businesses with a financial incentive to drive the uptake of circular business models would accelerate change."

JLP's 2024 circular fashion initiatives demonstrate how large retailers can integrate circular principles across their operations, challenging both the industry and consumers to rethink their relationship with fashion.

Marks & Spencer's

Takeback initiative



Photo credit: Marks & Spencer's

INTRODUCTION

M&S's takeback scheme is a cornerstone of its Plan A sustainability strategy, operating in partnership with Oxfam since 2008. The initiative exemplifies how major retailers can integrate circular principles into their operations, creating value while addressing environmental concerns.

The scheme's success relies on several key features. It leverages M&S's extensive brick-and-mortar footprint, utilising high-traffic locations to make participation easy and convenient for customers. To reduce complexity, the takeback operation runs largely independently from M&S's main supply chain. The partnership with Oxfam for sorting, reselling, and recycling donated items has been crucial to the scheme's effectiveness.

IMPLEMENTATION STRATEGY

Primarily funded by "for good" investment and grants, M&S has been able to maintain the programme without compromising its core business operations. The company leverages its store locations effectively, collaborating with Oxfam to sort donated clothes for resale and recycling. To minimise friction for customers, M&S has installed self-serve, easily located drop boxes in its stores. Looking ahead, M&S plans to extend the scheme's reach beyond physical shops with a pilot programme of home collection bags that customers can request online.

IMPACT AND FUTURE PLANS

The impact of the M&S takeback initiative has been substantial. Nearly 40 million items have been diverted from landfills since the programme's inception. The scheme has seen particular success in childrenswear and uniforms, areas where items are often outgrown before wearing out. Over time, M&S has observed an improvement in the quality of donated items, suggesting increased customer awareness and participation. The partnership with Oxfam has been instrumental in growing participation rates.



Photo credit: Marks & Spencer's

RÆBURN x Timberland

Circular design and sustainable production



Photo credit: Christopher Raeburn/Timberland

INTRODUCTION

In 2018, Timberland appointed British designer Christopher Raeburn, creator of RÆBURN, as its first Global Creative Director, aiming to advance the company's commitment to circularity and sustainable production. This partnership exemplifies how collaboration between innovative designers and established brands can drive meaningful change in the fashion industry.

CIRCULAR DESIGN PRINCIPLES

At the heart of this collaboration are RÆBURN's circular design principles, which incorporate the "RÆMADE, RÆDUCED and RÆCYCLED" approach¹². This philosophy is prominently showcased in the Earthkeepers by RÆBURN Collection, which reimagines sustainable and circular design in footwear and apparel and gave Timberland's classic Earthkeeper boot a circular makeover.

A key focus of the partnership is design for disassembly, creating products that can be easily taken apart for recycling or component replacement. The use of regenerative, recyclable, and mono-fibre materials further supports the goal of designing out waste.

Ræburn provides insight into the design for disassembly approach:

"We're always thinking about what happens down the line, and in short, we've made it where the above section of the shoe is then fully recycled, we've got a leather section, and we've got an actual rubber section. They can all be completely taken apart in the end. There's even the option to replace elements, rather than having to think about replacing a whole boot."



Timberland is looking to use all products thinking about what happens next and move towards circularity.

IMPACT AND VISION

The RÆBURN x Timberland partnership demonstrates the potential for collaboration and innovation in driving circularity within the fashion industry. By combining RÆBURN's expertise in circular design with Timberland's global reach and commitment to sustainability, the collaboration has the potential to inspire and influence other brands to adopt similar practices.

Ræburn explains the long-term vision of the partnership: "Ultimately, in my role as Global

Creative Director, I was charged with leading on the delivery of their mission that by 2030, Timberland is looking to design all products thinking about what happens next and move towards circularity."

This collaboration serves as a powerful example of how established brands can partner with innovative designers to accelerate their journey towards sustainability and circularity.



Photo credit: Christopher Raeburn/Timberland

Tammam

Ethical couture and circular fashion



Photo credit: Tammam

INTRODUCTION

Founded in 2007 by Lucy Tammam, Tammam is a British couture designer label that has spent over 15 years innovating in ethical and circular fashion. The brand's journey reflects the evolution of sustainability in the fashion industry and demonstrates how circular principles can be successfully applied to high-end couture.

KEY CIRCULARITY FEATURES

Tammam's approach to circular fashion is built on several key features. In 2012, the brand transitioned from a wholesale model to a bespoke production model, significantly reducing waste and speculation. This shift allowed Tammam to extend garment lifecycles by offering alterations, repairs, and reinvention services, prolonging the life of each piece. The brand focuses on using sustainable materials, particularly natural, compostable fibres, and has developed innovative solutions like compostable interlinings.

IMPLEMENTATION OF CIRCULAR PRINCIPLES

Lucy Tammam (left) explains the brand's journey and implementation of these circular principles: "At the time, there weren't any brands working with a focus on ethics, and that was my real focus. We converted to a bespoke model. Whereas we were doing trade shows and wholesaling, had stockists globally, so much waste and speculation was involved in that kind of model that it didn't feel sustainable to me."

The bespoke model, introduced in 2012, allows customers to experience the garments in person and choose from an annually created collection. It not only reduces waste but also creates a more personal connection between the customer and the garment. The brand's commitment to extending garment lifecycles is evident in its range of services.

"Because we're making everything here, we're also able to offer services like alterations, repairs, reinvention of garments. When a customer stops wanting to use a garment, it isn't then useless. We can do something to make it become a loved garment again," says Tammam.

SUSTAINABLE MATERIALS AND ZERO-WASTE APPROACH

Tammam's focus on sustainable materials is comprehensive. The brand uses natural fibres and has developed fully compostable products, right down to the labels and stitching. Its zero-waste approach is equally thorough, with Lucy noting, We throw nothing away.

None of our fabrics get thrown away; tiny scraps are used. We've got one big-ish bin of scrap fabrics, and that's probably all of our scrap from the last maybe five or six years.

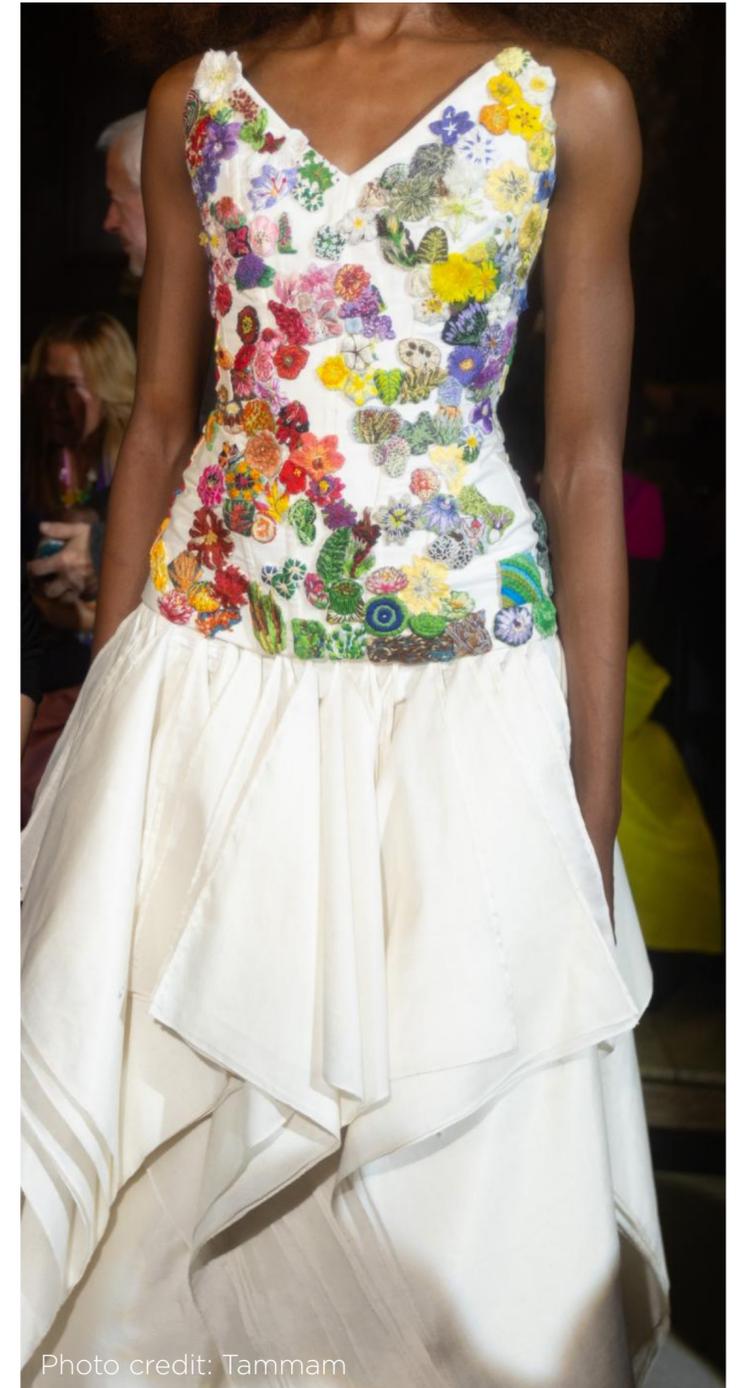


Photo credit: Tammam

Chapter 3

Sustainable Manufacturing



Introduction, current landscape and ambitions

With its rich heritage and significant economic impact¹⁵, today the UK fashion and textile manufacturing sector stands at a crossroads. The global market is evolving at a rapid rate, with the UK facing both exciting opportunities for transformation and formidable challenges.

Recent years have seen unprecedented disruptions to the sector – Brexit, COVID-19, and a UK cost of living crisis to name but a few. But the resilience of the industry is clear. The manufacturing sector in the UK has the opportunity to realise its potential through sustainable transformation and technological innovation.

CFIN's work to-date highlights three key areas where sustainable manufacturing can help create a circular fashion ecosystem:

Technological potential

Advanced technologies such as AI, automation, and robotics have the potential to reshape the industry, improving efficiency, quality, and on-demand capabilities. These innovations offer significant opportunities to enhance decision-making, boost efficiency, and streamline operations across various stages of the manufacturing process.

Capacity and demand alignment

There's a growing potential for reshoring part of the production volume for UK retailers¹⁶. This aligns with sustainable production approaches, offering benefits such as reduced transportation costs and emissions, increased supply chain resilience, and more agile production systems responding quickly to market demands.

Innovation landscape

The UK is seeing a flourishing of innovative manufacturing models, including local denim finishing, dye recycling, and repair labs integrated into manufacturing settings. These developments indicate a shift towards more agile and circular production methods.



Manufacturing challenges and opportunities in the UK

As the UK fashion and textile manufacturing sector navigates the path towards sustainability, it faces a unique set of opportunities and challenges.

Reshoring and sustainable production

As outlined on the previous page, there's growing potential for reshoring part of the production volume of UK retailers to UK manufacturers. Reshoring strategies require significant investment in infrastructure and skills development to make UK manufacturing competitive on a global scale. Moreover, it's crucial to recognise that many UK manufacturers operate as service providers, with limited ability to impact product design. Effective collaboration between brands, retailers, and manufacturers is therefore essential to implement sustainable practices throughout the value chain.

Technology and innovation are critical enablers in the reshoring agenda. While the UK has historically been a powerhouse of fashion and textile innovation, current adoption of advanced manufacturing technologies lags behind global competitors. It is also important to recognise that technological progress alone is not enough; substantial capital investment in new machinery and infrastructure is essential for modernising UK textile manufacturing and improve sustainability outcomes.

Skills and workforce development

The transition to sustainable manufacturing requires a skilled workforce. The UK faces challenges in terms of an ageing workforce in traditional manufacturing¹⁷ and a skills gap in advanced manufacturing technologies¹⁸. Addressing these gaps is crucial for the sector's sustainable future.

Importantly, the need for skills development cuts across all aspects of sustainable manufacturing. From circular design to advanced manufacturing technologies and compliance management, continuous investment in workforce training is crucial for the sector's sustainable transformation.

This complex interplay of reshoring potential, technological innovation, and workforce development presents both challenges and opportunities for the UK fashion and textile sector. In the following section, we'll explore CFIN's programme insights and findings, which aim to address these challenges and drive the sector towards a more sustainable and circular future.

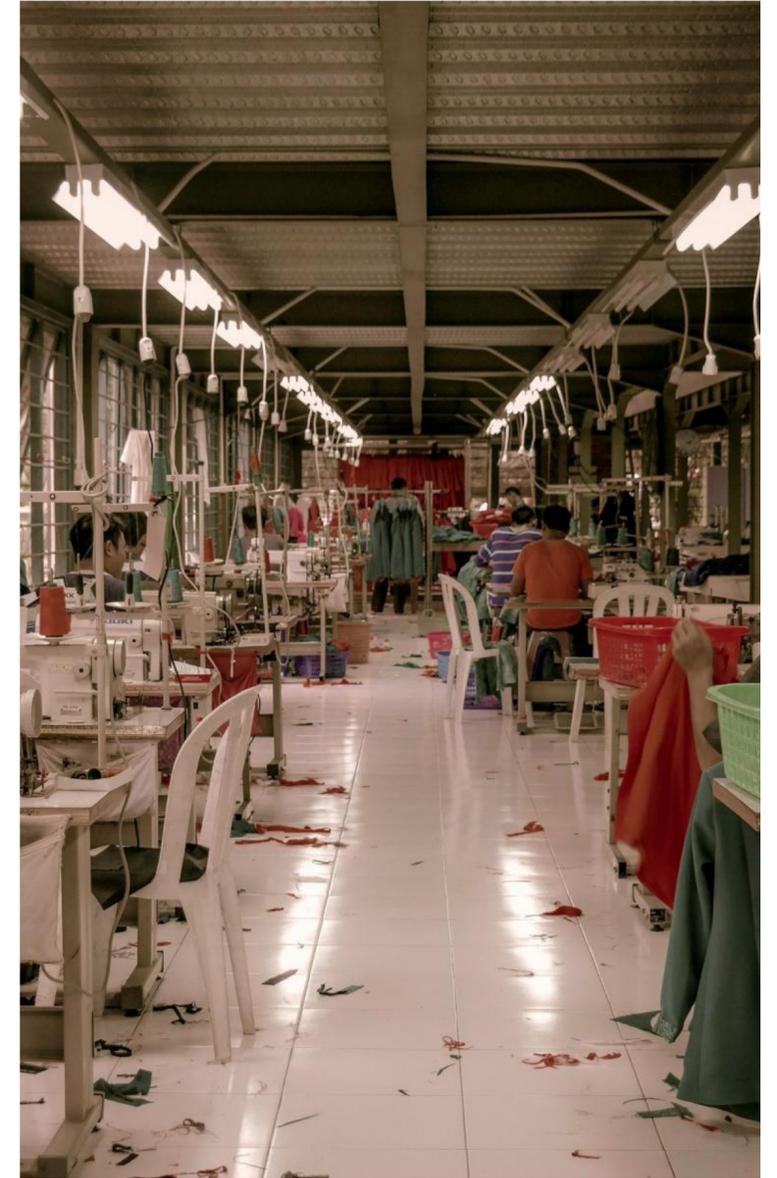
Against this backdrop, CFIN has been working to support sustainable transformation in the UK's

manufacturing sector. Through a series of targeted pilots, workshops, and industry research projects, CFIN has explored key areas crucial for the sustainable transformation of the UK manufacturing sector.

Our programme has engaged a diverse range of stakeholders, including UK textile and apparel

manufacturers, leading retailers and brands, innovators, and academic institutions. By facilitating collaboration and knowledge-sharing, we aim to address the challenges facing the industry and pave the way for a more sustainable, efficient, and competitive UK textile and apparel manufacturing sector.

We'll showcase some of our main activities in the following pages.

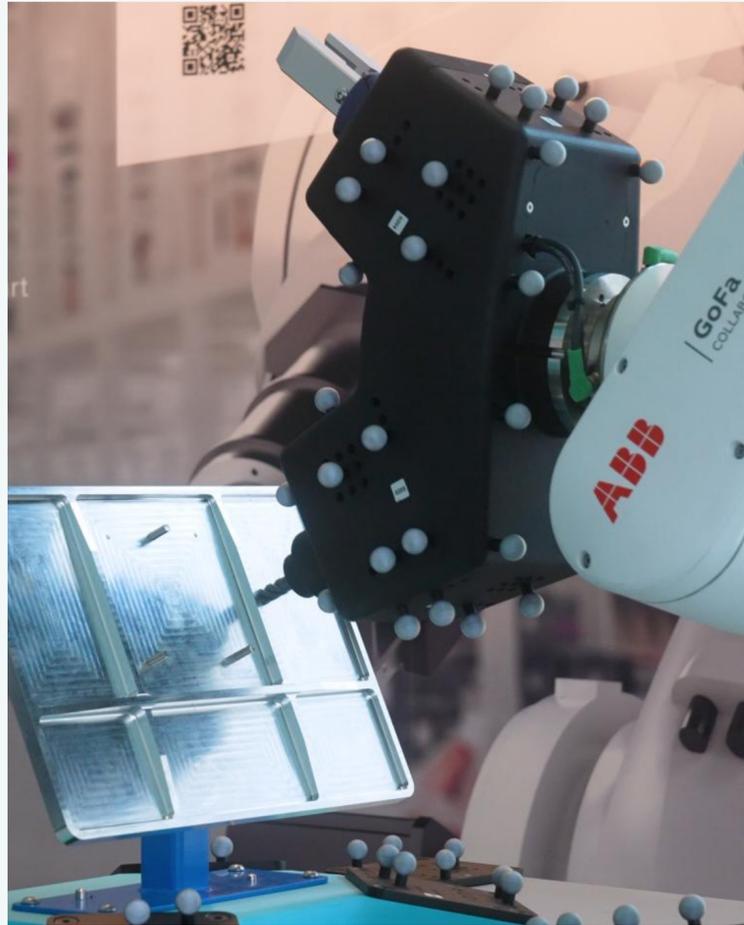


Insights and findings

Reshoring volume production

AI in apparel manufacturing

Pilot project

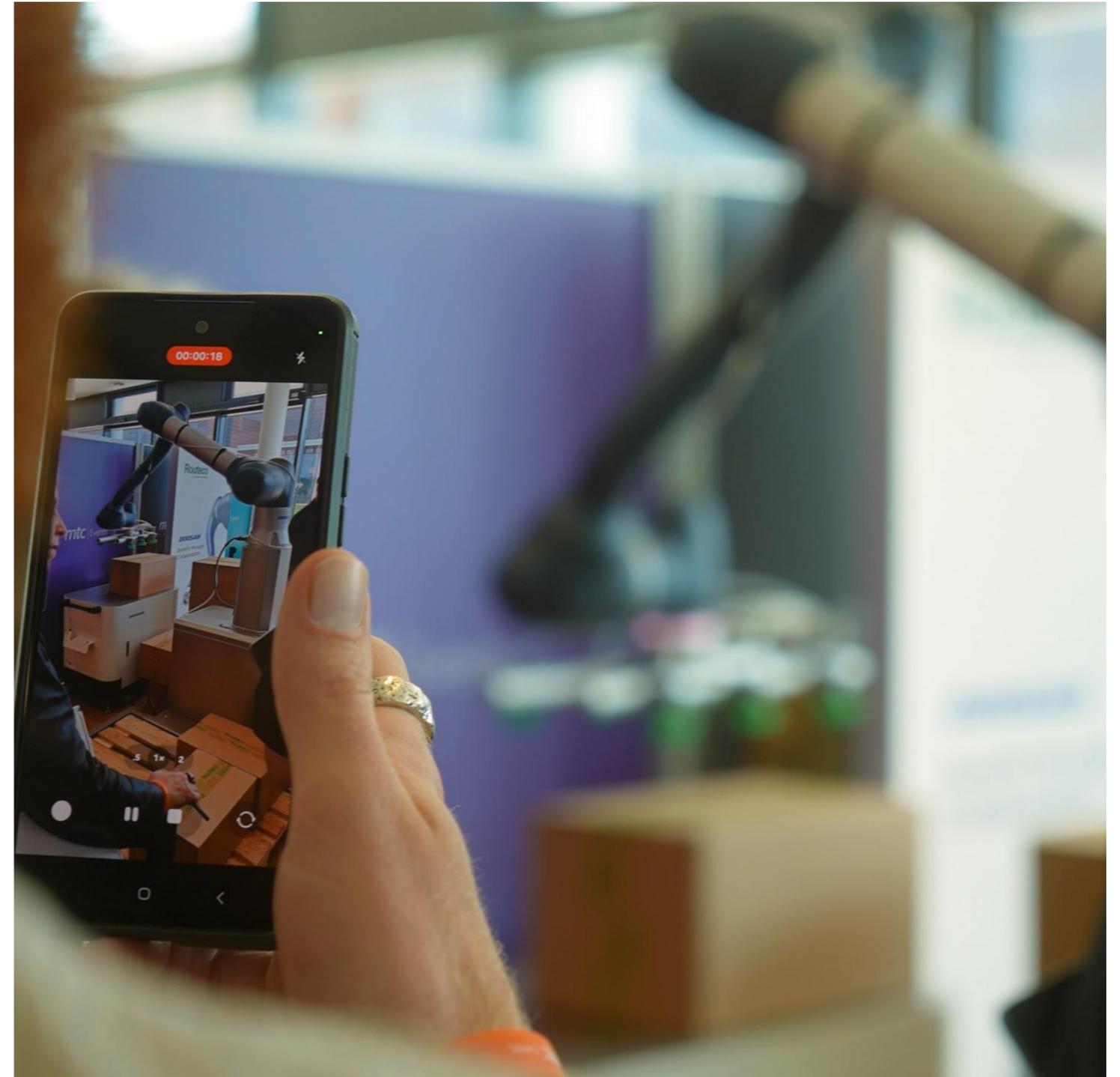


One of CFIN's key initiatives has been exploring the implementation of AI-powered production planning software in UK apparel manufacturing. This pilot project, a collaboration between an online retailer, UK manufacturer, and an innovator, aims to enhance productivity and support Just-in-Time (JIT) manufacturing.

The project utilises an AI-powered software solution which utilises advanced technologies such as reinforcement learning and digital twin technology to optimise production workflows. These technologies are designed to improve decision-making, boost efficiency, and streamline operations across various stages of the manufacturing process.

Our objectives for this project include augmenting service processes of UK manufacturing, creating a reproducible model for establishing a large UK manufacturing network, and prototyping a minimum viable model of JIT manufacturing as a service. The expected outcomes include demonstrating a successful case study to encourage reshoring and transformation of production cycles, streamlining production processes, ensuring on-time delivery, reducing days to market, and improving the handling of more complex items.

This pilot project represents a significant step towards understanding how AI can improve production planning, agile manufacturing, and efficiency in UK fashion and textile manufacturing, potentially transforming production processes and enhancing the sector's capabilities.



Insights and findings

Reshoring volume production

Re-thinking onshore denim finishing



Photo credit: LaundRe

We have launched an on-shore denim finishing pilot in collaboration with LaundRe, the UK's first denim sustainable near shoring and reprocessing hub. This six-month initiative, in collaboration with a UK volume high street in the UK, aims to transform unwashed jeans into trend-responsive fashion products within the UK. The objective is to demonstrate the commercial viability of on-shore finishing of unwashed jeans for a UK brand.

The pilot involves processing 200 jeans into 2-4 innovative finishes, with the goal of delivering four fashion washes aligned with the buyer's vision, quality standards, and target price points. This project has the potential to offer numerous benefits to the participating brand, including minimising environmental impact, enabling circularity in production, reducing carbon footprint, reducing excess stock and markdowns, and enabling rapid response to fashion trends.

This pilot aims to demonstrate the viability of more responsive and sustainable fashion production in the UK. By bringing denim finishing on-shore, it offers the potential for faster turnaround times, reduced environmental impact, and increased flexibility in responding to market trends.

CFIN will release full findings from the pilot in early-2025.



Photo credit: LaundRe

Insights and findings

Enhancing existing manufacturing capacity

Automation and robotics workshop

CFIN, in collaboration with the Robotics Living Lab at Manchester Metropolitan University, brought together UK retailers, brands, and manufacturers at the Manufacturing Technology Centre in Coventry. The purpose was to discuss the current state of automation and robotics in UK fashion and textiles manufacturing, exploring barriers, opportunities, and routes to progress.

There is a growing recognition of automation and robotics' potential in the textile industry, with participants expressing interest in how these technologies could support reshoring efforts and improve efficiency. It was noted that automation is already being successfully used in logistics and warehousing, with benefits including faster operations, improved efficiency, and waste reduction through more consistent results.

A key insight from the workshop was that robots can be utilised to enhance worker productivity and increase job security, shifting the narrative from employee replacements to automation and robotics as a tool for workforce enhancement and development.

Building on these industry perspectives and the collaborative discussions during the workshop, a set of insight were developed to accelerate the adoption of automation and robotics in the UK fashion and textile manufacturing sector.

Key Insights

Agile equipment design

Developing machinery that can be quickly reconfigured for different jobs is crucial for the dynamic nature of fashion manufacturing. This agility in equipment design, coupled with the implementation of straightforward tooling, ensures ease of use for operators and allows manufacturers to respond rapidly to changing market demands and production requirements.

Industry education

Improving alignment between industry and education providers ensures that courses produce industry-ready graduates. This alignment is crucial for creating a workforce prepared to work with and further develop automation technologies in the fashion and textile sector, bridging the gap between academic knowledge and practical industry needs.

These recommendations aim to address the challenges and opportunities presented by automation and robotics in the UK's fashion and textile manufacturing sector, paving the way for sustainable growth and innovation.

What is the Robotics Living Lab?

In January 2024, Manchester Metropolitan University (MMU) was awarded £3.8 million to develop its Robotics Living Lab. The funds were directed from the Art and Humanities Research Council for the design and build of the new facility, and the Lab will explore more sustainable approaches for fashion manufacturing by bringing together designers, researchers, and manufacturers.

The Lab will support new research into developing carbon-neutral approaches to high-value, low-volume production. It will explore innovative new tooling solutions to create new stitching, cutting, pressing and repair tools to support small fashion design businesses.

Collaborative robots, known as 'Cobots' will work alongside humans in the Lab, while the development of design software for pattern cutting and garment construction sequencing will also allow for digitally enhanced design and manufacturing.

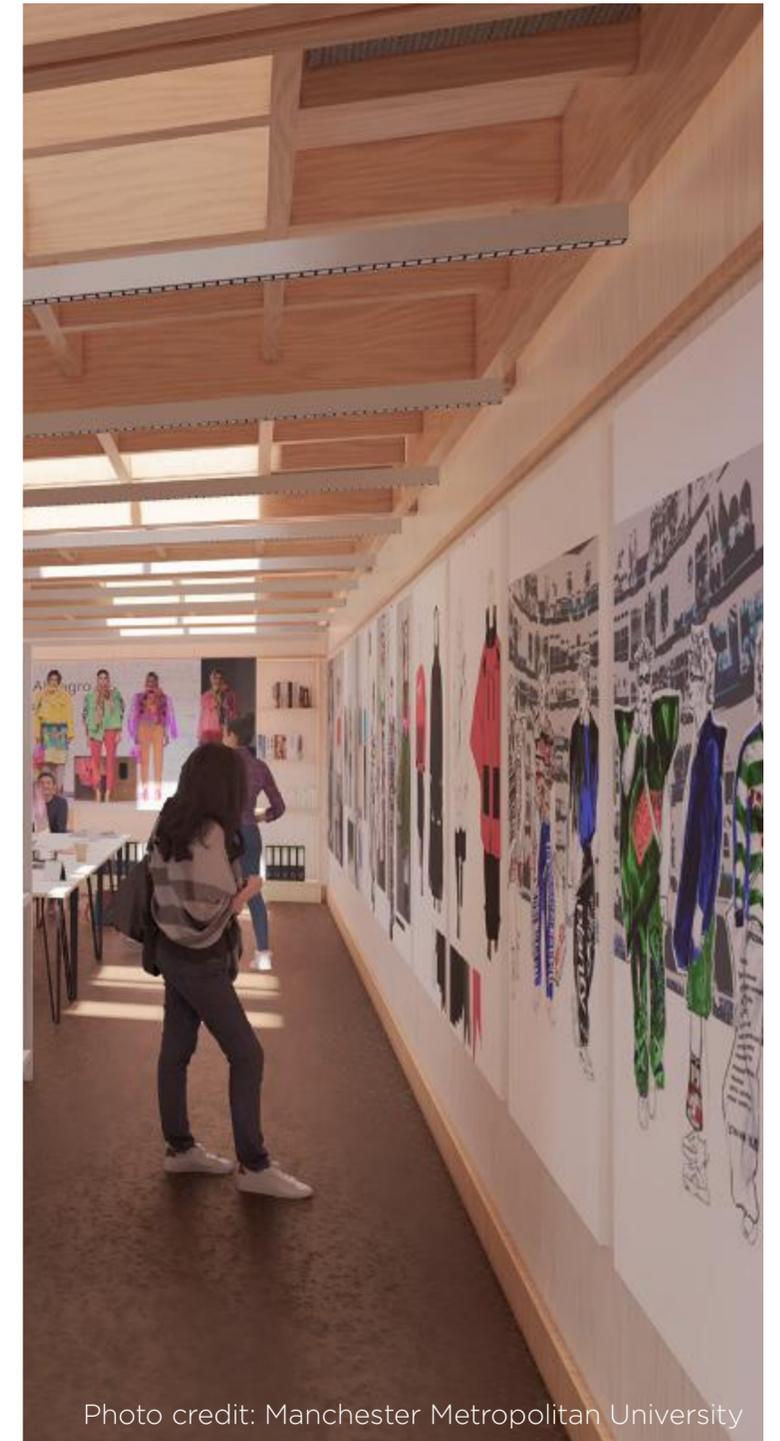


Photo credit: Manchester Metropolitan University

Compliance in UK fashion and textiles manufacturing

CFIN has been working to improve compliance practices in UK manufacturing to improve the ability of UK manufacturers to comply with the growing suite of sustainability regulations. We have engaged with retailers, brands, garment manufacturers, textile manufacturers and compliance experts.

Our initiatives explored themes such as current client/maker relationships within the UK, ambitions and opportunities within UK manufacturing, current social and ethical compliance operational baselines, costs, responsibilities and barriers, and recommendations for improvement.

CFIN is consolidating the results to present findings across five key areas: legislation and regulation, education and training, standardised working practices, new systems and databases to manage compliance, and incentives and funding.

This work aims to strengthen the UK's position for responsible and ethical manufacturing, addressing current opportunities and challenges while fostering a more transparent and sustainable future for the sector.



Decarbonising manufacturing

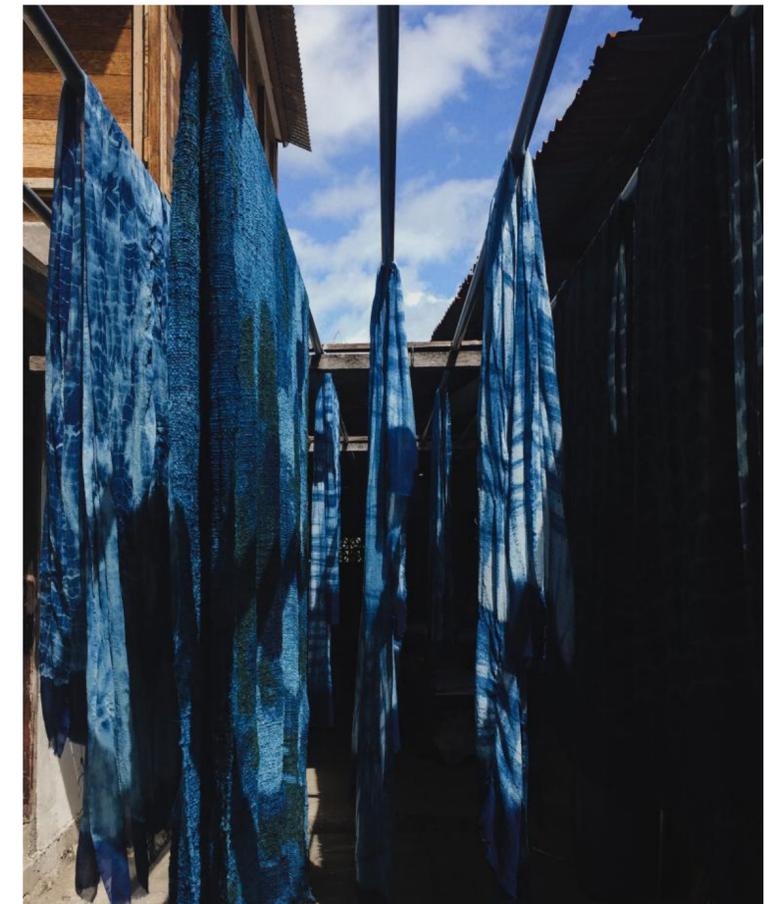
Textile dyeing innovation

CFIN has undertaken a global innovation review¹⁹ of the textiles dyeing sector, including the innovation landscape in the UK. We have engaged with a wide range of stakeholders, including industry experts, innovative companies, and academic researchers, providing insights into the current innovation landscape and identifying opportunities for further advancements in sustainable dyeing practices.

The innovation landscape in textile dyeing is flourishing. Colour production is moving away from traditional natural and synthetic dyes, exploring cutting-edge areas such as synthetic biology, biotech, and sustainable chemistry. These novel approaches offer exciting possibilities for reducing environmental impact and enhancing production efficiency. However, many of these new options are still in development and don't yet match conventional dyes in properties and colour range, indicating a need for further research and development.

Another promising area of innovation is the recycling of dyes at the end of a product's life cycle. This largely underexplored field could not only facilitate textile recycling but also significantly reduce environmental impact. Innovations in this area could create a more circular approach to dyeing, aligning with broader sustainability goals in the fashion and textiles industry.

There are opportunities and challenges in integrating new technologies into existing supply chains. Many new developments require significant economic investment and can be difficult to implement in current manufacturing facilities. This underscores the need for innovations that can be integrated with minimal intervention to scale effectively.



Circular manufacturing

A successful circular fashion and textile system requires collaboration among various stakeholders across the supply chain and product lifecycle. These stakeholders must work together to identify key challenges and innovate, test, and scale new approaches to developing, producing, using, and recycling textile-based products.

CFIN has collaborated with the Circular Concept Lab to bring together UK-based textile and garment manufacturers, innovators in the fashion and textile manufacturing ecosystem, and post-industrial recyclers. Our work explored circularity practices that can lead to further decarbonisation in the UK manufacturing sector.

Key focus areas included: reducing material impact, extending product lifespans and closing the loop. Stakeholders shared current circular strategies and worked in teams to envision future circular manufacturing scenarios” can we change to ‘reducing material impact, optimising product lifespans and closing the loop.

Emerging technologies and digital platforms play a crucial role in supporting a transition towards circular fashion and textile manufacturing. Better planning and monitoring, transparency, data-sharing and collaboration, can all be achieved through the digitalisation of supply chains.

Key Insights

Funding and investment

Participants highlighted the need for greater investment in funding machines and capital investment in machinery. They also noted the complexity of current funding requirements, such as the need for academic partnerships.

Skills and training

The need for a skilled workforce and education in circular manufacturing was emphasised, including skills at the factory level, the need for vocational qualifications to teach sustainability skills, the importance of C-suite education, and the development of new roles such as Circular Design skills.



Insights and findings

Sustainability 101 Series

In response to identified needs within the industry, CFIN launched the Sustainability 101 series²⁰, a set of guides designed to support UK manufacturers in their journey towards more sustainable operations and processes.

The series consists of six guides, of which three have been published to date:



Standards and Certifications Guide

This guide²¹ assists manufacturers in identifying which standards are suitable for their business and how to leverage them to improve sustainability performance at both site and product levels. It includes detailed information on the certification requirements for manufacturers working with organic fibres, cotton, wool, and chemical management. By providing this comprehensive overview, the guide enables manufacturers to make informed decisions about which certifications to pursue and how to implement them effectively.

Green Claims Guide

This resource²² supports UK manufacturers in making accurate and reliable statements about their sustainability practices. It explores the Competition and Markets Authority's green claims code and outlines expectations in both UK and global contexts. The guide also provides practical guidance on making compliant green claims through an interactive checklist, helping manufacturers navigate the complex landscape of sustainability communication.

Human Rights and Environmental Due Diligence in Supply Chains Guide

This guide²³ delves into the concept of due diligence, its history in business, and information about existing and upcoming due diligence frameworks that could impact UK businesses. It sets out tools and resources for businesses in the industry to implement due diligence in their operations and supply chains, helping manufacturers to proactively address potential human rights and environmental issues.

To complement these written guides, CFIN has developed a series of webinars that expand on each topic. These webinars are designed to engage a wider audience beyond manufacturing, including brands, retailers, and education providers. The webinar series covers a range of topics including:

- Standardisation and certification processes
- The business value of sustainability certification
- Sustainable fashion communication strategies
- Avoiding greenwashing in fashion
- Understanding responsible supply chains
- Introduction to human rights due diligence

This comprehensive educational programme demonstrates CFIN's commitment to supporting the industry's transition to more sustainable practices. By providing accessible, practical information and fostering knowledge exchange, the Sustainability 101 Series is developing resources and knowledge exchange to upskill the sector and encourage adoption of sustainable manufacturing practices across the UK fashion and textiles industry.

Circular manufacturing case studies

Through our research and engagement with industry leaders, CFIN has identified three key circularity areas within which manufacturers can implement effective strategies: reducing material impact, optimising product lifespans, and closing the loop.

These strategies are not just theoretical concepts but are being put into practice by forward-thinking UK companies. The following case studies highlight how manufacturers are turning circular principles into reality, showcasing the potential for sustainable growth and innovation in the sector. Each example provides valuable insights into the challenges and opportunities of implementing circular practices, offering lessons that can be applied across the industry.



Building on our research and stakeholder engagements, CFIN has identified the following key areas of focus to May 2025:

1. Establish the potential of volume manufacturing

- Develop a business case for a UK-based sustainable apparel manufacturing park that meets volume apparel demand.
- Engage with UK industry to build demand for an apparel manufacturing park.
- Engage with global manufacturers to explore response to investing in volume UK production.



2. Continue exploration of technological innovations

- Focus on automation, robotics, and AI in fashion and textile manufacturing settings.
- Analyse opportunities and challenges and develop recommendations for implementing new technologies in UK manufacturing.
- Establish collaborations between manufacturers and technology innovators.
- Develop educational tools and key insights to demonstrate the potential of technology for UK manufacturing.

3. Support research and knowledge sharing on automation and robotics

- Explore the industry response (both retail and manufacturing) to automation and robotics.
- Develop a white paper to present findings from automation and robotics research.
- Highlight the potential of automation and robotics to reshore manufacturing to the UK.

4. Skills and training needs

- Work with industry to identify skills gaps and opportunities in sustainable manufacturing.
- Support education and training on new sustainable manufacturing technologies and processes, including the Manufacturing 101 series.
- Create easily accessible resources for the industry to learn about automation and sustainability in manufacturing.



Abraham Moon

Reducing material impact



Abraham Moon, established in 1837, is a medium-sized textile manufacturer based in Leeds. Its approach to reducing material impact goes beyond just durable production and waste utilisation. As a vertical mill, it ensures quality and consistency by using eco-friendly materials throughout their process.

A standout initiative is its collaboration with British Wool. In 2024, Abraham Moon developed a range of products crafted from 100% traceable British Lambswool, including throws, apparel fabrics, and interior textiles. This partnership not only supports local farmers facing challenges due to long-term decline in wool prices but also contributes to the vitality of the British wool sector.

Its sustainable and circular approach extends to transparency and accountability. Abraham Moon regularly measures key areas such as energy consumption, waste production, and material sourcing using established frameworks like the Higg Index²⁴. It has also developed a thorough carbon roadmap with expert guidance to better understand its impact and ensure they remain on track to achieve their sustainability goals.



Photo credits: Abraham Moon

Photo credits: Abraham Moon

LaundRE

Optimising product life



Beyond its 'ReFinishing' and 'ReShoring' services, LaundRe has launched a 'ReBorn' pilot which explores the renewal of discarded and dirty jeans.

In collaboration with LMB Textiles, ReSkinned, and Jeanologia, LaundRe is testing the rejuvenation of discarded jeans and customer returns, transforming them into 'as new' premium-quality garments. This creates a commercial alternative to newly manufactured jeans by using old, used garments as raw material.

All of the company's machines measure and record data in real-time, with Environmental Impact Measurement (EIM) software used to score each jean. LaundRe is also exploring different platforms to enable full transparency with customers, sharing its ESG Strategy, chemical and water management data, and carbon footprint.



Photo credits: LaundRe

linouio

Closing the loop



Photo credits: linouio

linouio, based in West Yorkshire, has revived wool recycling in the UK, reestablishing technology and skills that had disappeared from the region in the 1980s. Its processes can handle 100% wool, wool-rich blends, and other animal fibres like cashmere and angora. Notably, it's developed capabilities to recycle garments with up to 20% synthetic content, a significant advancement in textile recycling.

linouio partners with Camira to develop circular solutions for both Camira's waste materials and those of its customers. This waste is converted back into fabric for interior furnishings which demonstrates linouio's expertise in creating closed-loop systems. While most of the company's work is focused on closed-loop recycling, it is also exploring open-loop possibilities in the early stages of development.

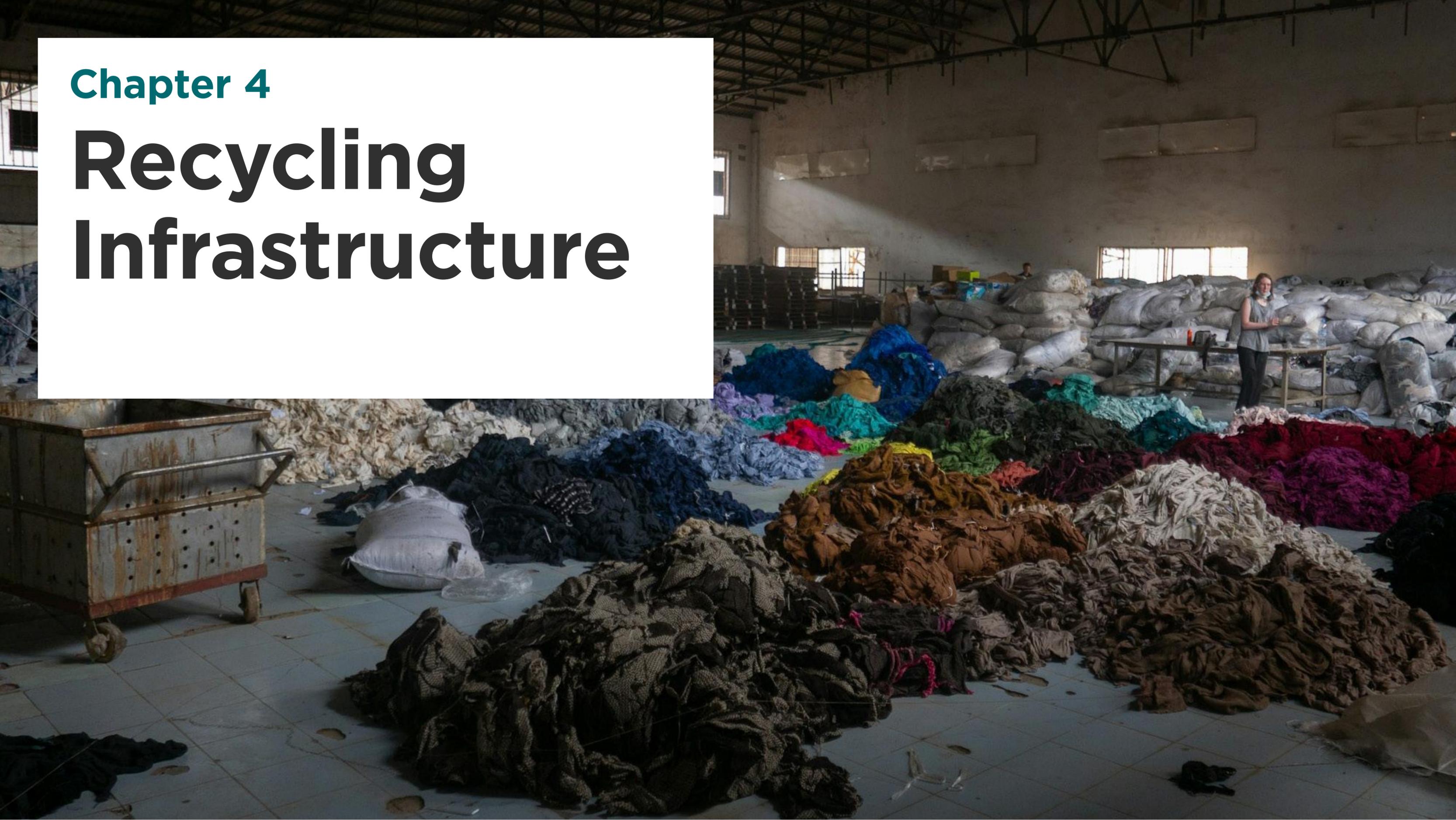
linouio's impact extends beyond manufacturing to education and research. Its collaboration with universities and industry partners to advance circular textile solutions, contributing to the knowledge and skills crucial for a circular fashion future.



Photo credits: linouio

Chapter 4

Recycling Infrastructure



Introduction and current landscape

CFIN is developing a National Textile Recycling Infrastructure Plan²⁵ for the UK, addressing the urgent need for sustainable management of non-rewearable textiles and increasing textile-to-textile recycling capacity. This initiative is crucial for ensuring the UK remains competitive and environmentally responsible. The UK's textile recycling landscape presents a significant opportunity for development and innovation. With approximately 1.45 million tonnes of post-consumer textiles generated annually in the UK, there is considerable potential to create an effective recycling ecosystem.

This presents a socio-economic opportunity to capture the value of these textiles, generate sustainable benefits, and contribute to economic growth and job creation. Our research and stakeholder engagements have revealed three critical areas that demand immediate attention:

1. The need for a comprehensive National Textile Recycling Infrastructure Plan
2. The potential for technological advancements to transform the sector
3. The substantial socio-economic benefits of developing a robust recycling ecosystem

Current UK landscape

In the UK, 711 kilotonnes of post-consumer textiles go directly to residual waste annually, with 638 kilotonnes going to incineration and 83 kilotonnes to landfill, representing a loss of value and economic opportunity. Out of the 650 kilotonnes of post-consumer textiles that are diverted, just 34 kilotonnes are recycled in the UK²⁶.

This data highlights a critical gap in our current collection and processing capabilities, representing not only a significant environmental issue but also a missed economic opportunity.

Key stakeholders in post-consumer textile collection

Post-consumer textile collection involves a complex network of stakeholders, each playing a crucial role in the collection and processing of post-consumer textiles. Through its engagement with industry partners and extensive research, CFIN has gained valuable insights into the roles and responsibilities of these key players. The following stakeholders are integral to the post-consumer textile collection process:

Local government

Responsible for waste collection from the general public, local authorities play a vital role in establishing available collection infrastructure. However, they often lack efficient data on what is being diverted, recycled, reused, landfilled, or incinerated, creating a significant data visibility gap.

Charity sector

Currently responsible for collecting almost 350 kilotonnes of post-consumer textiles annually in the UK, primarily through public donations, charities play a significant role in the initial sorting and distribution of used textiles.

Textile waste management companies

Often contracted by local authorities, these companies manage various waste streams, including textiles. Their expertise in handling different types of waste is crucial for efficient sorting and processing.

Textile recycling merchants

These commercial entities handle the sorting, grading, and commercialisation of collected textiles. However, they are facing challenges due to decreasing profitability.

Brands and retailers

Increasingly implementing take-back schemes, brands and retailers are becoming more involved in the collection of post-consumer textiles, taking greater responsibility for the lifecycle of their products.

Innovative collection services and platforms

Emerging services like Reskinned (a UK business that helps people and brands with resale, recycling, and takebacks of unwanted clothing) and Recomme (a UK circularity platform for brands and retailers) are supporting the industry in post-consumer textile collection, bringing innovation to the sector to the sector.

Introduction and current landscape

Policy context

UK policy direction

The Department for Environment, Food and Rural Affairs (DEFRA) is considering²⁷ several proposals to address these challenges, including:

- Developing a textiles waste hierarchy to guide businesses in managing textile and fashion products and materials.
- Exploring requirements for separate collection of reusable and recyclable textiles according to the waste hierarchy, including:
 1. Considering bans on landfilling or incinerating separately collected textiles without prior sorting.
 2. Requiring larger businesses to provide customer take-back systems.
 3. Banning separately collected material from being sent to landfill or energy recovery without prior sorting.

These proposals, while not yet legislated, indicate a clear direction of travel towards a more circular textile economy in the UK. It is CFIN's view that these measures, whilst welcome, do not go far enough, and must be supported by the introduction of a UK EPR initiative.

EU policy

The European Union is implementing an ambitious strategy²⁸ to promote circularity in textiles, which provides an important context for the UK. There are several mechanisms that are to be introduced to drive textile recycling, including:

- Mandatory ecodesign requirements.
- EPR schemes.
- Banning the destruction of unsold or returned textiles.
- Separate collection of textile waste.

Countries such as France²⁹, Hungary³⁰, and the Netherlands³¹ have already adopted EPR policies for textiles, with others actively considering similar measures. This shift emphasises the urgency for the UK to develop its approach to post-consumer textile recycling.



Introduction and current landscape

Textile categories and recycling approaches

Reusable vs non-reusable textiles

To effectively address the challenges of textile waste and move towards a more circular fashion economy, it's crucial to understand the various categories of textiles and the recycling approaches available for each. This understanding forms the basis for developing targeted strategies and technologies to manage textile waste more efficiently.

Reusable vs non-reusable textiles

Within the post-consumer textile waste stream, it's important to differentiate between reusable and non-reusable textiles:

Post-consumer reusable textiles

These clothing/textile streams should go through a repair and/or resale stream.

Post-consumer non-reusable textiles

These are textiles that are not reusable for their intended purpose. They need to be collected, sorted, and treated in line with the waste hierarchy, prioritising remanufacturing and recycling over energy recovery or landfill and incineration.

The proportion of non-reusable textiles is growing due to decreasing quality, particularly driven by volume fashion trends. This shift underscores the increasing importance of developing robust recycling solutions.

Recycling approaches

For non-reusable textiles, there are two main recycling approaches:

Open-loop recycling

This involves recycling materials where inputs from one industry are recycled into outputs for another industry. For example, plastic bottles being recycled into yarn for textile use.

Textile to textile recycling (closed loop)

This refers to recycling materials from one industry to create outputs for use in the same industry. For example, a cotton t-shirt being recycled into raw fibre to be spun and used to create another textile product.

Textile to textile (closed loop)

Within closed-loop recycling, there are several processes:

Mechanical recycling

Materials are mechanically processed to recover and use existing fibres in new textiles.

Thermomechanical recycling

Heat and pressure are used to melt synthetic textiles to recover polymers.

Chemical polymer recycling

Materials are taken back to their polymer level, purified, and reprocessed.

Chemical monomer recycling

Materials are taken back to their monomer and/or oligomer building blocks, purified, and repolymerised.

These various recycling approaches offer different opportunities for managing the UK's textile waste, particularly the growing proportion of non-reusable textiles. Developing and scaling these technologies will be crucial for creating a more circular textile economy in the UK.

Actions

CFIN is developing a National Textile Recycling Infrastructure Plan for the UK, focusing on five key pillars:

Market capacity and commercial viability

This refers to the total sales volume or value that the textile recycling market can potentially generate. It helps assess the overall opportunity and potential for growth, ensuring that recycling initiatives are economically sustainable.

Infrastructure

This encompasses the underlying physical and organisational structures that support textile recycling. It includes logistics for post-consumer textile collection, industrial facilities for recycling, and information technology for data exchange between sorting facilities and recyclers.

Skills and workforce

This pillar focuses on the abilities, knowledge, and expertise needed in the textile recycling sector, as well as the total number of people available for work in this industry.

Technology

This involves tools, systems, and innovations that facilitate efficient and effective recycling of textiles, aiming to improve various aspects of the recycling process, including collection, sorting, processing, and reutilisation of materials.

Government interventions

These are actions taken by the government to influence or regulate various aspects of the textile recycling industry, including regulation, taxation, or trade policies.

To address these pillars, we've identified seven critical areas of intervention in the textile recycling supply chain. Within these pillars, we have engaged with a range of stakeholders to discuss critical areas of intervention such as:

Post-consumer textile collection

We have looked at how consumers dispose of their textiles and how these are collected, forming the beginning of the textile recycling supply chain.

Textile management

We have explored how the different avenues through which post-industrial, pre-consumer, and post-consumer textiles are managed by various stakeholders.

Used textile sorting and pre-processes

We have engaged with the sorting and grading sector to understand how textiles are classified as rewearable, non rewearable, and waste.

Non-rewearable textile sorting and pre-processing

We have engaged closely with ACT UK to understand the potential of automated sorting and pre-processing of textiles to drive recycling.

Textile to textile manufacturing

We have engaged with textile to textile stakeholders to understand opportunities and challenges, including gaps and challenges in current R&D to help support and scale textile to textile recycling.

Recycling textiles in manufacturing

We have explored how fashion and textile manufacturers can recycle their own textile waste or partner with existing solutions to recycle post-industrial waste.

Recyclable and recycled content demand in retail

We have engaged stakeholders to understand the opportunities and challenges of incorporating recyclable and recycled content in product offerings to meet environmental impact reduction targets, consumer demand, and align with the legislative landscape.

Recycling infrastructure programme: Other actions and insights

The development of the National Textile Recycling Infrastructure Plan for the UK has been underpinned by extensive engagement across the entire textile recycling value chain. This collaborative approach, involving industry organisations, policy makers, local authorities, and innovators, has revealed a complex landscape of challenges and opportunities within the UK's textile recycling sector.

Industry and policy perspectives

Engagement with key industry stakeholders such as WRAP, the Textile Recycling Association, and Veolia has highlighted the sector's readiness for transformation, tempered by significant infrastructure and market challenges. These discussions have been complemented by regular consultations with DEFRA and EU organisations, such as Euric and Euratex.



Cross-project alignment

We have aligned our efforts with the UKRI's Circular Fashion Programme³⁰ ([source](#)), incorporating insights from ACT UK and engaging with Network+ projects to develop knowledge for the plan. The EPR data sandbox project (2023-2024)³¹ ([source](#)) has also informed our work, exploring an industry-led EPR system to incentivise circular economy principles.

What is ACT UK?

Automatic Sorting for Circular Textiles Programme (ACT UK) is a two-year project supported with funding from Innovate UK and led by UK Fashion and Textile (UKFT). The project brings together a consortium of recycling technologies, textile collectors and sorters, academia, manufacturers, industry associations, technologists and brand and retailers. It is part of a broader Circular Fashion Programme supported by UK Research and Innovation (UKRI), which CFIN is a part of.

The aim of the project is to establish the blueprint for an innovative Advanced Textile Sorting and Pre-processing facility (ATSP), which would take in non-rewearable textiles and deliver this as feedstock for fibre-to-fibre recyclers. This will prepare the UK market for transition to textiles circularity.

Key project outcomes

- By 2025, create a world class state-of-the-art blueprint for an ATSP, integrating the latest technologies.
- Provide the economic incentivisation of regional material recycling over export of NRT in lower cost labour regions or to landfill/incineration.
- Leverage the consortium roles, knowledge and innovation to drive the transition from linear to circular textiles in the UK.
- Cement the UK's global leadership in innovation and textiles circularity, creating new markets, jobs and foreign direct investment opportunities.

Recycling infrastructure programme: Other actions and insights

Post-consumer textile collection complexities

Engagement with organisations such as Traid, Salvation Army Trading Company, and other innovative collection services has emphasised the pressing need for more convenient and efficient collection options for consumers. The current post-consumer textile collection infrastructure is not set up to drive the reuse and recycling of textiles to a maximum.

A persistent theme emerging from these discussions is the data visibility gap faced by local authorities. The lack of comprehensive data on the fate of collected textiles hinders effective decision-making and strategy development.

Challenges in sorting and grading

Engagement with sorting and grading organisations has revealed a sector under significant pressure. The quality of incoming textiles has markedly decreased, challenging existing business models. Brexit has exacerbated these issues, contributing to skills shortages in a sector that requires specific expertise in brand awareness and market understanding. The export of sorting operations due to lower labour costs abroad presents both a challenge to UK capabilities and an opportunity to reshape domestic recycling infrastructure.

Innovations in textile-to-textile recycling

Innovations within textile-to-textile recycling technologies shows promise for handling a wider range of fibre types, material compositions, and

further research and development are needed to accelerate the scaling of these innovations and achieve commercial viability.

Textile recycling in manufacturing

Discussions with fashion and textile manufacturers have highlighted growing interest in circular manufacturing practices. While integrating recycling into manufacturing processes presents challenges, it also offers opportunities for creating closed-loop systems that reduce waste and generate new value streams.

Technology as a catalyst for change

Engagement with technology providers and innovators has revealed promising solutions to many current challenges. The potential implementation of smart collection bins, advanced waste collection systems, and mobile applications could significantly improve efficiency in textile collection and recycling while addressing the data visibility gap faced by local authorities. There is also the potential for technological advancement of automated sorting and pre-processing of textiles.

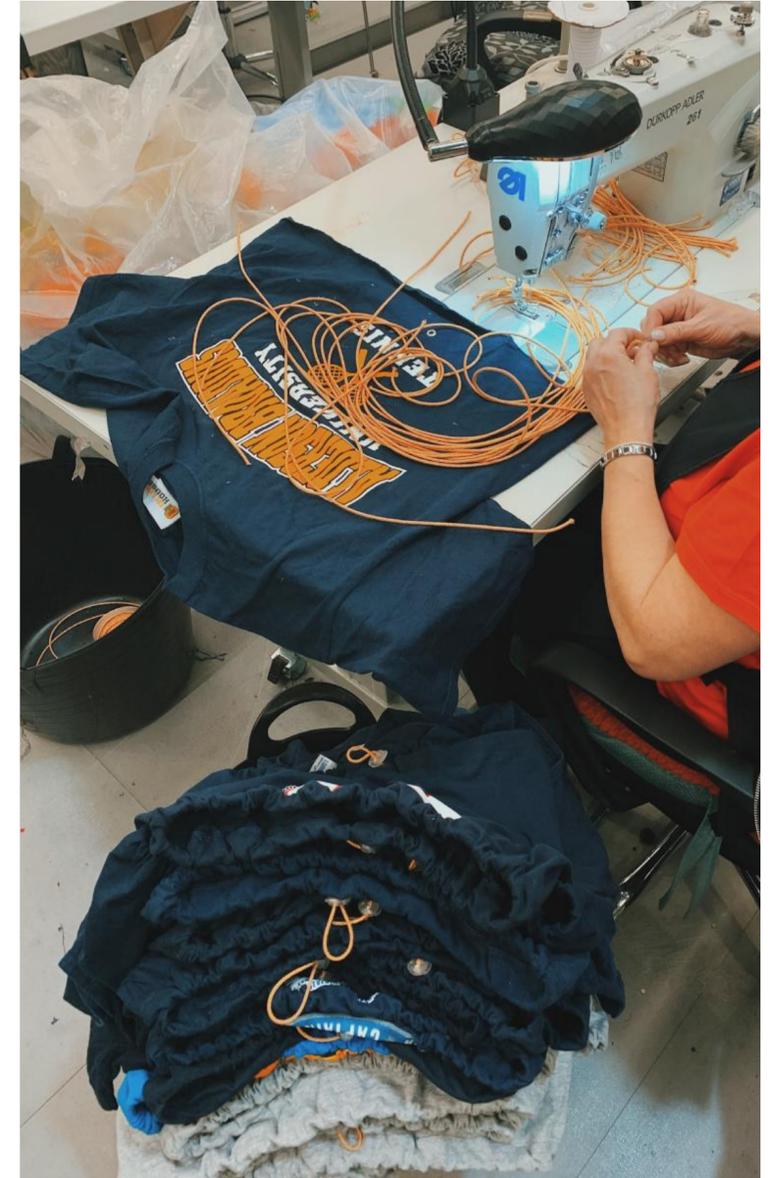
Consumer behaviour and public awareness

A recurring theme across stakeholder engagements is the critical role of consumer behaviour. Despite growing environmental awareness, ineffective disposal methods for textiles remain common, challenging the rewearability and recyclability of clothing. This insight underscores the need for comprehensive public education campaigns to drive behavioural change in both purchasing decisions and disposal habits.

The insights gained from this wide-ranging stakeholder engagement provide a solid foundation for developing a robust and effective National Textile Recycling Infrastructure Plan.

Key priorities emerging from these discussions include the development of standardised collection and data reporting systems, investment in domestic automated sorting and pre-processing, and textile recycling grading capabilities, and exploration of innovative technologies.

By addressing these interconnected challenges and opportunities, the UK has the potential to transform its textile recycling sector, driving both environmental sustainability and economic growth.



Building on our research and stakeholder engagements, CFIN has identified the following key areas for the Recycling Infrastructure theme's next steps:

1. Develop a National Textile Recycling Infrastructure Plan

- Identify key stakeholders to increase domestic textile recycling capacity in the UK.
- Engage with industry stakeholders to further understand opportunities and barriers to transition towards a textile recycling supply-chain.
- Analyse the gaps and opportunities in infrastructure, market capacity and commercial viability, technology and skills.
- Develop a socio-economic impact analysis of a national textile recycling infrastructure in the UK.
- Create a comprehensive plan for a National Textile Recycling Infrastructure.
- Call on government to support National Textile Recycling Infrastructure.

2. Support R&D initiatives to boost textile recycling in the UK

- Identify key research priorities through consultation with industry and academia across the textile recycling supply chain, with a focus on automated sorting and pre-processing and fiber to fiber recycling.
- Facilitate connections between researchers, technology firms, and industry partners.

3. Develop policy recommendations

- Identify key policy areas and interventions to drive the development of a textile recycling infrastructure in the UK.
- Plan a strategy for effectively communicating these recommendations to relevant government bodies and policymakers.

Through these next steps, CFIN aims to drive significant progress in developing a robust, sustainable textile recycling infrastructure in the UK. We will continue to work closely with our partners and stakeholders to realise these ambitious goals.



Chapter 5

Programme Next Steps



PROGRAMME NEXT STEPS

In addition to the next steps across our three primary themes, the following wider programme level actions will be taken:

- Take findings from three priority areas and develop work within Novel Technology, Diverse and Futureproof Workforce and Green Growth:
 - Novel Technology to include a technology showcase bringing together players from start-ups, corporates and investors and an insights gathering exercise to understand how to increase the adoption of sustainable materials
 - Diverse and Futureproof Workforce to look at where there are existing skills gaps and workforce challenges as we move to a circular fashion ecosystem
 - Green Growth to understand the investment required to develop and maintain our Target Future State
- Define and develop key policy recommendations to enable large scale adoption of a circular ecosystems
- Recruit four SMEs to participate in EPR Sandbox Phase 2 to better understand what a variable fee system could look like for smaller organisations
- Continue to deliver knowledge sharing forums through webinars, workshops, roundtables and other medium to ensure CFIN insights reach as wide an audience as possible, bringing together all stakeholders in the supply chain

The mobilisation of the CFIN network is still very much in its infancy. In order to maximise the output from CFIN, we need to continue our work, which is dependent on funding. With additional funding, CFIN would prioritise work in the following areas:

Overall Programme

- Advocacy for further legislation and regulation.
- Feed findings of the EPR work and into policy recommendations.
- Network development and optimisation.

CBMs

- CBM accelerator.
 - Business change and transformation.
 - Circular design.
 - Regulation, particularly ecodesign.
-



Sustainable Manufacturing

- UK apparel manufacturing park.
 - AI and robotics.
 - Compliance.
-

Recycling Infrastructure

- Policy and economic roadmap.
 - Large scale industrial pilot.
-

PROGRAMME NEXT STEPS

As this report highlights, there is still work to be done in transitioning to a circular fashion ecosystem. However, we are confident that with continued support, funding, and collective action across the sector, we can achieve our goal of a circular fashion ecosystem by 2032.

Now is the time for all stakeholders across industry, — academia, NGOs, and policymakers — to come together and leverage these findings to drive meaningful change. We invite you to incorporate these insights into your work, as CFIN continues to facilitate and support this crucial transformation. Together, we can create a more sustainable, innovative and economically vibrant future for the UK fashion and textile sector.



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CFIN Resources

Reports

1. [Innovations in Textile and Apparel Dyeing \(Technology and Colour\)](#)

Programme Campaigns

1. [Workshop: Exploring Automation and Robotics for UK Fashion and Textile Manufacturing](#)

Programme Webinars

1. [CFIN: Putting Humans at the Heart of Circularity with Accenture](#)
2. [Driving Textile Recycling Through Policy in the UK](#)
3. [From Concept to Concession: How to Implement Successful Repair Services in Fashion](#)
4. [Navigating Green Claims & Avoiding Greenwashing: Guidance from the Competition & Markets Authority](#)

Sustainability 101 Series: Guides

1. [Issue One: A UK Manufacturers' Guide to Standards and Certification](#)
2. [Issue Two: A UK Manufacturers' Guide to Green Claims](#)
3. [Issue Three: A guide to human rights and environmental due diligence in supply chains](#)

Sustainability 101 Series: Webinars

1. [Taking responsibility through standardisation: Deep dive into Oeko tex certification](#)
2. [Unlocking the business value of certification with Textile Exchange's tools](#)
3. [The Sustainable Fashion Communication Playbook Masterclass: Shifting the Narrative around Green Claims](#)
4. [How to avoid Greenwashing in Fashion, with the Competition and Markets Authority](#)
5. [Understanding Responsible Supply Chains in Fashion & Textile](#)
6. [Introduction to Human Rights Due Diligence](#)
7. [Understanding Environmental Due Diligence and Tools for Compliance](#)
8. [EU Sustainability Legislations: What impact could it have on your business?](#)



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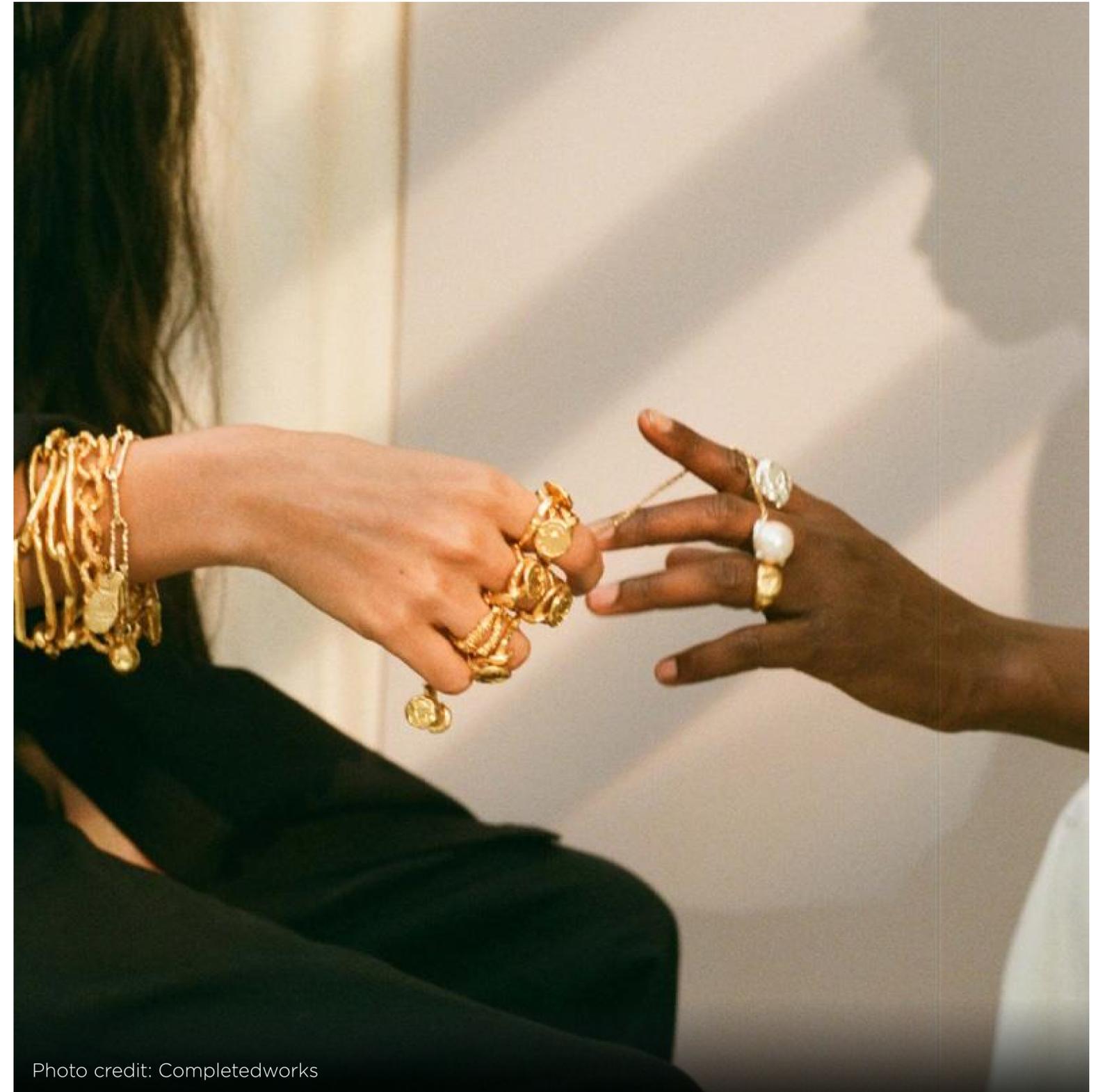


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