



IMAGES
YEARBOOK
VOLUME XX . NO.1

BEYOND TRENDS

100

Sustainable
Fashion Retail
Initiatives

INDIA
BUSINESS OF
FASHION
REPORT
2024



IMAGES
GROUP. IN

Dear Readers,

It has been rightly said that sustainability is intuitively understood, yet has no coherent definition. It is context dependent and situational and has different meanings for different people. In the context of fashion retail, sustainability simply translates into preserving the environment, but away from the glitz and glamour of the world of clothes, the fashion retail industry has a dark, gritty side. It has the dubious distinction of being one of the largest polluters in the world today, and according to a study by WHO, contributes to nearly 10% of the global carbon emissions. Consumers are buying more, paying less and discarding faster than ever before. In response, clothes are being produced by the bulk and using cheaper raw materials, in a bid to make fast profits. The Ellen Macarthur Foundation, a United Nations Environment Programme partner, has estimated that a truckload of abandoned textiles is dumped in landfill or incinerated every second.

However, every cloud has a silver lining. On the flip side of this dismal story is the beautiful tale of the rise of the sustainable fashion market. This segment of the industry has seen significant growth in recent years, as attitudes toward environmentalism have changed. Brands and retailers, alarmed at the increased rate of pollution are rapidly changing stance, shifting to sustainable methods of sourcing and production.

As consumers are waking up to the cause of preserving the planet for future generations, the 'ethical fashion market', as it is being dubbed, is gaining popularity. This segment is expected to grow to 9.7% by 2030 and products marketed as sustainable are expected to grow 5.6 times faster than their regular counterparts. Studies show that the Asia Pacific region accounts for 36% of the global ethical fashion market, the largest global share.

It is keeping in mind this pivotal, transformational moment that we are introducing the second edition of IMAGES Group's sustainability book. *Beyond Trends: 100 Sustainable Fashion Retail Initiatives* is an insightful and timely book that studies change in consumer behaviour, leading to a makeover for the fashion retail industry. Once solely focused on style and trends, this industry is waking up to the clarion call for adoption of sustainable and circular practices.

As we stand at the intersection of fashion and responsibility, our book serves as a guiding light, illuminating the path towards a more sustainable future for the industry.



Dear Readers,

In a world where fashion trends come and go, the need for a more sustainable and ethical approach to the Fashion Retail industry has never been more pressing. As consumers, we play a pivotal role in shaping the fashion landscape. The choices we make impact not only our closets but also the world around us. But for fashion retailers, brands and manufacturers, it is not so simple. For them, the journey towards sustainability isn't merely a moral obligation; it's a strategic imperative for addressing critical global challenges while ensuring industry's continued viability and success.

The purpose of sustainability in fashion retail is to minimize negative environmental and social impacts throughout the entire lifecycle of fashion products, from production to disposal. This involves adopting practices that prioritize eco-friendly materials, ethical labor standards, waste reduction, and carbon footprint minimization.

By integrating sustainability into fashion retail, businesses can contribute to the preservation of natural resources, mitigate climate change, promote fair labor practices, and meet the evolving preferences of socially conscious consumers. Ultimately, it fosters a more responsible and resilient fashion industry for both present and future generations.

Studies show that the sustainable fashion market has witnessed a significant growth in recent years, fueled by a global shift toward environmental consciousness. According to statistics, the sustainable fashion industry is currently worth over \$6.5 Billion, is expected to grow to \$10.1 Billion by 2025 and by 2030 that number is expected to hit \$15 Billion.

Studying this transformative market is our book, *Beyond Trends: 100 Sustainable Fashion Retail Initiatives*. This second book by IMAGES Group on sustainability seeks to illuminate the path towards a more conscious and responsible fashion retail industry.

Going beyond the allure of aesthetics, the coffee table book dives deep into the intricate web of technology, supply chains, materials, and consumer behaviors that define modern fashion and provides research and innovative solutions on how the industry can adopt sustainability.

Publisher:
S P Taneja

Project Advisory:
Amitabh Taneja
R S Roy
Anjali Sondhi
Bhavesh Pitroda
Nikhil Behl

Project Partners:
AGS Group

Editor-in-Charge:
Surabhi Khosla

Editorial Support
Kajal Ahuja

Creatives:
Pawan Kumar Verma

Design Team:
Deepak Verma
Prakash Jha

Production:
Manish Kadam

Images Multimedia Pvt. Ltd.
(CIN: - U22122DL2003PTC120097)

Registered Office: S-61 A, Okhla Industrial Area
Phase 2, New Delhi 110 020
T: +91 11 40525000 | F: +91 11 40525001
E: info@imagesgroup.in | URL: www.imagesgroup.in

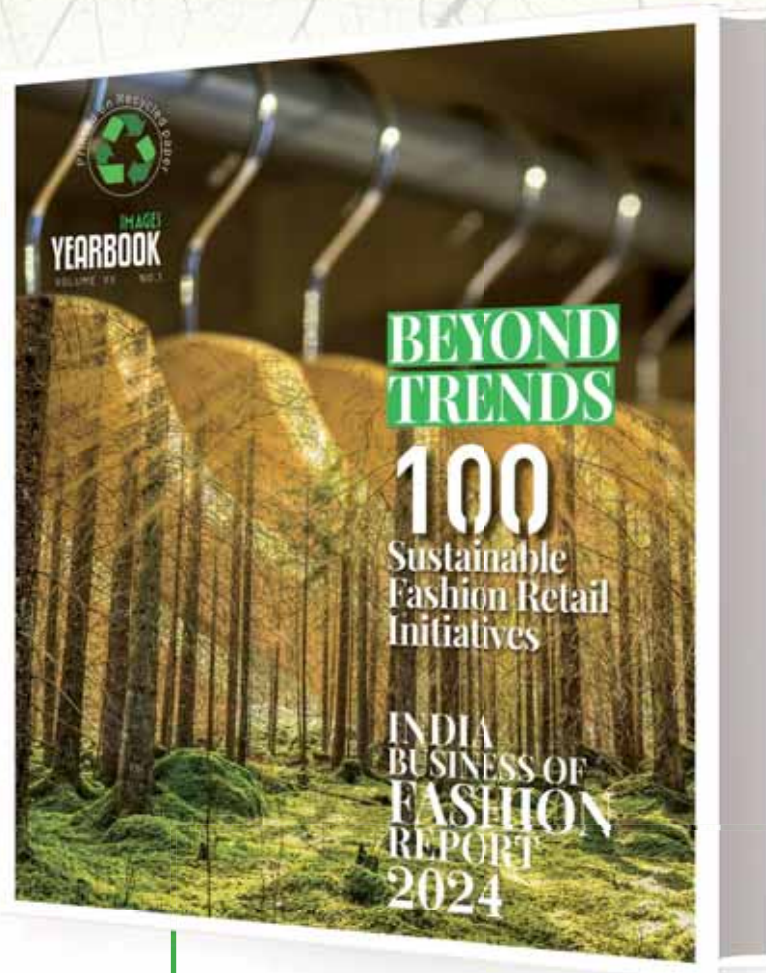
Mumbai: E 519, Floral Deck Plaza, Central MIDC
Road, Opp SEEPZ, Andheri East, Mumbai 400 093
T: +91 22 28398000

All material printed in this publication is the sole property of Images Multimedia Pvt. Ltd.
All printed matter contained in the magazine is based on the information provided by the writers/
authors. The views, ideas, comments and opinions expressed are solely of the writers/authors or those
featured in the articles and the Editor and Printer & Publisher do not necessarily subscribe to the same.

Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Modest Print Pack
(P) Ltd. C-52, D.D.A. Shed Okhla Industrial Area Phase -1, New Delhi - 110 020
and published by S P Taneja from S - 61A Okhla Industrial Area Phase -2, New Delhi 110 020
Editor: Amitabh Taneja

In relation to any advertisements appearing in this publication, readers are recommended to make
appropriate enquiries before entering into any commitments. Images Multimedia Pvt. Ltd. does not
vouch for any claims made by the advertisers of products and services. The Printer, Publisher and
Editor-in-Chief of the publication shall not be held for any consequences in the event of such claims
not being honored by the advertisers.

Copyright Images Multimedia Pvt. Ltd. All rights reserved. Reproduction in any manner is prohibited.
All disputes are subject to the jurisdiction of competent courts and forums in Delhi/New Delhi only.
Images Retail does not accept responsibility for returning unsolicited manuscripts and photographs.



An
IMAGES
GROUP . IN
Research

Cover Price

₹ 5000 | US\$ 150

To order your copy, contact:

Priti Kapil

Deputy Manager – Consumer Connect & Subscription

S-61 A, Okhla Industrial Area Phase 2,
New Delhi 110 020

T: +91 11 40525000 | F: +91 11 40525001

Mobile: +91 9868801869

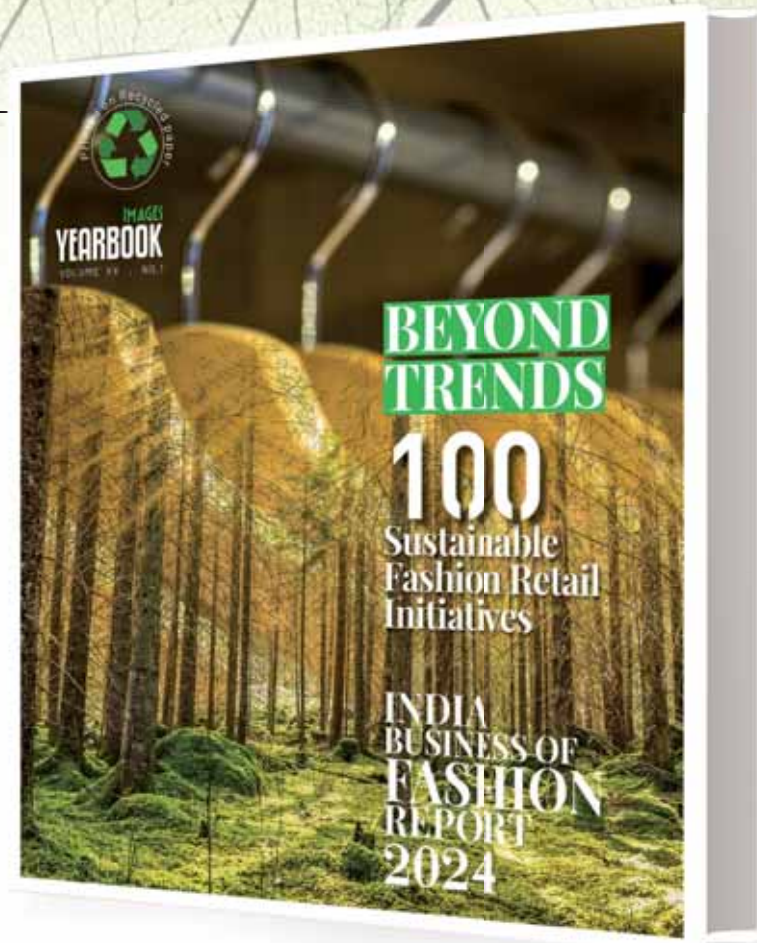
E-mail: pritikapil@imagesgroup.in

Contents

SECTION ONE

RETAIL LANDSCAPE22

- 1.1 OVERVIEW 24
 Indian Fashion Retail Market – 2023
by Amit Gugnani & Shubham Ghate, Technopak Advisors
- 1.2 MARKET CHALLENGES36
 Challenges Facing the Fashion Industry & the Road Ahead Towards Sustainability
by Karan Dhall; Shashank Rai Goel & Tanima Singh, Kearney
- 1.3 CIRCULAR BUSINESS MODELS 42
 Fashion Forward, Planet First – Sustainability in Fashion Retail
by Senthil Kumar Balraj & Abhijit Niyogi, Tata Consultancy Services
- 1.4 STORE DESIGN 48
 Store, (Common) Sense & Sustainability: A Practical Guide to Circular & Sustainable Store Design
by Juhi Santani, Retale Design
- 1.5 CASE STUDY 56
 Closing the Loop: Birla Cellulose’s Path to Sustainability & Circularity
by H K Agarwal, Managing Director – Grasim Industries Limited & Business Director, Pulp and Fibre Business, Aditya Birla Group



SECTION ONE

Sustainability Initiatives

- Lenzing 64
- Liva 66
- Raysil 68
- Renewcell 70
- Resil 72
- SaXcell 74
- Trident Group 76
- US Cotton Trust Protocol 78
- Welspun 80
- The Woolmark Company 82

Contents

SECTION TWO

FIBRE & FABRIC86

- 2.1 TRENDSPOTTING 88
Trends Poised to Unfold in Circular Fashion & Sustainable Production in 2024
by Puneet Dudeja, WGSN
- 2.2 SUSTAINABILITY & CIRCULARITY 94
Sustainability & Circularity in the Indian Fashion Retail Sector
by Ashish Dhir, Kashish Gupta & Sumeesha Dhawan, 1Lattice
- 2.3 TRANSPARENCY & TRACEABILITY 104
From Cotton Fiber to Fashion: Scaling Traceability in the Fashion Industry
by Daren Abney, U.S. Cotton Trust Protocol
- 2.4 PLANT-BASED INNOVATIONS 110
Plant-Based Innovations in Fashion Retail for Consumer Impact
by Jim Kreuger, ProTech / Sanitized USA
- 2.5 CULTURE & DIVERSITY 116
Sustainable Fashion & Handloom: A Cultural and Environmental Analysis
by Swikruti Pradhan, Rustic Hue

SECTION TWO

Sustainability Initiatives

Arvind Ltd	128
American & Efird	134
Bananatex	136
Birla Cellulose	138
Ganesha Ecosphere Ltd	142
ReLan	146
Textile Exchange	148
Twin Dragon Marketing Inc.	152

SECTION THREE

TECHNOLOGY164

- 3.1 BALANCING GROWTH & RESPONSIBILITY 166
Adoption of Sustainability in the Fashion Retail Industry
by Pakhi Saxena, Wazir Advisors
- 3.2 RETHINKING RETAIL 170
Retail Reimagined: The Future of Retail for Consumers, Companies & the Earth
by Ganesh Subramanian, Stylumia
- 3.3 FUTURISTIC HUES 174
Shifting to Sustainability with Solutions from Archroma
by Lee Howarth & Navneet Krishnan, Archroma
- 3.4 NEW PACKAGING FORMATS 178
Sustainable Packaging Trends
by Dr Sunder Balakrishnan, Natur Tec India Pvt Ltd
- 3.5 WASTE TO FIBRE 186
Transforming Agricultural Waste into Textile Grade Fibres Through Technology
by Shreyans Kokra, Canvaloop
- 3.6 VIRTUAL DESIGN & TECHNOLOGY 190
The Transformative Impact of Virtual Design & Technology on Sustainability
by Anirwan Bansriyar, Aquarelle
- 3.7 TEXTILE WASTE RECYCLING 194
Sustainability & Circularity in the Fashion Industry: A Perspective on Textile Waste Recycling, Government Policies & Consumer Demand
by Satish BR, UGO Tech

Contents

SECTION THREE

Sustainability Initiatives

Arc'teryx	202
Colorifix	206
Roar for Good	210
SmarText Solutions B Wise	214
The Aid by Trade Foundation	216
Technip Energies	218

SECTION FOUR

CASE STUDIES224

4.1 REEARTH TOMORROW	226
Thread by Thread - ABFRL's Journey in Sustainable Fashion <i>by Dr. Naresh Tyagi, Chief Sustainability Officer, ABFRL</i>	
4.2 CIRCULOSE®	232
Renewcell: We Make Fashion Circular <i>by Tricia Carey, Chief Commercial Officer, Renewcell</i>	
4.3 SMART FASHION	236
Functionality + Sustainability = Smart & Green Fashion <i>By Manish Khambe – Vice President Global Business Development at N9 World Technologies Private Limited</i>	
4.4 BEYOND TRADITIONAL MODELS	240
Regenerative Fashion Going Beyond Sustainability in Retail <i>by Kapil Bhatia, CEO & Founder, UNIREC</i>	

4.5 SOCIAL IMPACT	246
Being Human Clothing – Being Conscious – Made in India for the World <i>By Vivek Sandhwar, COO, Being Human Clothing</i>	

SECTION FOUR

Sustainability Initiatives

Anvyaa	252
Burberry	254
Caleres	258
Calvin Klein	260
Crocs	262
FastFeetGrinded	264
Oshadi	265
Kazo	266
Puma	268
PVH Corp	270
Stella McCartney	274
The Terra Tribe	276
Tommy Hilfiger	278
Uniqlo	280
Urbanic	284

Contributors	286
--------------------	-----



Indian Fashion Retail Market- 2023

India has traversed a transformative decade, characterised by the rise of populism in the West in 2016, demonetisation in 2017, the shadow banking crisis in 2018, and the unprecedented COVID-19 pandemic in 2020. In the last few years, the Western world grappled with the highest inflation in four decades, and two wars since early 2022. Despite uncertainties, India managed to forge ahead...

By Amit Gugnani, Senior Partner & Head-Fashion; Shubham Ghatge, Research Associate, Technopak Advisors





Challenges Facing the Fashion Industry & the Road Ahead Towards Sustainability

The journey towards sustainability begins with understanding the environmental and social impact across the lifecycle of products - from raw material extraction to disposal of used fashion items, and the challenges that the industry must overcome to minimise these...

By Karan Dhall, Partner; Tanima Singh, Sustainability Professional; Shashank Rai Goel, Senior Principal, Kearney





Fashion Forward, Planet First – Sustainability in Fashion Retail

As climate change escalates and consumers are becoming increasingly conscious of the consequences of their purchasing decisions, the call for sustainable practices is growing louder than ever before. Circular business models are emerging, driven by consumers seeking higher value for their money...

By Senthil Kumar Balraj, Business Unit Leader; Abhijit Niyogi, Business Unit Head Retail, Tata Consultancy Services (TCS)





Store, (Common) Sense & Sustainability:

A Practical Guide to Circular & Sustainable Store Design

Sustainability in store design holds an inherent dichotomy. On the ladder carbon footprint generating activities, building and running a store lies below only to bulk production and logistics. With organised retail poised to grow to 25%, with 87% of this in India offline, every little reduction in a store's carbon footprint shall add to a substantial difference...

By Juhi Santani, Director, Retail Design





SECTION ONE



Sustainability Initiatives

sustainability
/səˌsteɪnəˈbɪlɪti/
noun

To create and maintain conditions under
which humans and nature can co-exist
in productive harmony and preserve the
planet for future generations



For 80 years now, Lenzing, a leading Austrian provider of wood-based specialty fibres, has been looking beyond fibre. Lenzing's fibres are made from natural wood. They are botanic products derived from renewable sources and processed with unique resource-conserving technologies. This is how the company takes responsibility for our planet's future. The company's solutions are as inventive as they are effective when it comes to caring for its partners' success, the planet's protection and people's needs in everyday life. Associated with over 500+ brands across the world, Lenzing has helped brands and retailers create numerous sustainable yet fashionable and comfortable options to meet the rising demand for eco-responsibly produced apparel and home textile products.

What distinguishes Lenzing's sustainability ideas and concepts is their all-embracing benefit: They maximise value creation from both the environmental and the economic perspective. This universal approach is the future of our industry. And Lenzing is already living this future.

Sustainability & Transparency

Within the context of our strategic principles, Lenzing's 'naturally positive' sustainability strategy defines seven core challenges in which the Lenzing Group makes significant contributions. The company sets ambitious targets in these areas to further strengthen its path to a sustainable future. These focus areas directly contribute to several Sustainable Development Goals (SDGs) of the United Nations.



Sustainable Energy

The company is now making a substantial commitment to sustainable energy by investing in a new wind farm.

- Partnering with Austrian electricity producer WLK energy, Lenzing has secured approximately 13 megawatts of wind power through a 15-year contract set to commence in 2025.
- This collaboration underlines the company's dedication to fostering a stable and diversified power supply.
- The generation of renewable electrical energy from wind, solar, and biomass stands as a fundamental element of the company's corporate strategy, forming the bedrock for sustained long-term commercial success.
- In 2019, Lenzing was the first fibre manufacturer to set itself the goal of reducing its CO2 emissions by 50% by 2030 and becoming carbon-neutral by 2050.
- In 2022, Lenzing opened Upper Austria's largest open-space photovoltaic plant together with Verbund and also signed an electricity supply contract for photovoltaic energy with the green electricity producer Energy and Energie Steiermark.

SaXcell

SaXcell is a new-generation textile manufacturing company based out of the Netherlands. SaXcell, an abbreviation of Saxion cellulose, is a regenerated virgin textile fibre made from chemically recycled domestic cotton waste. The process to transfer domestic cotton waste into SaXcell fibre is a crucial step in the circular textile chain. In 2015, it was found that every kilogram of recycled cotton yielded at least 980 grams of new yarn during the production of SaXcell.

The reuse of clothing is of all times. The production of textiles from cotton has a large environmental impact. Furthermore, the need for clothing is increasing and if no changes are made to the production chain, the effects of the pollution will increase to the worse. A study conducted by EY proved how the new fabric could become an interesting commercial solution for all apparel brands struggling with waste management.

Sustainability Initiative: Better Together

Textile recycling innovator SaXcell, reputed for recycling used textiles into feedstock for making new and sustainable man-made cellulosic fibres that require less water, land, and chemicals has signed a Memorandum of Understanding (MoU) with Birla Cellulose.

Birla Cellulose, the pulp and fibre business of the Aditya Birla Group, is a leading sustainability-focused Man-Made Cellulosic Fibres (MMCF) producer. It operates 12 sites for pulp and fibre manufacturing that apply environmentally efficient closed-loop technologies including recycled materials and enhanced conservation of natural resources.



Innovation & Technology

The unique aspect of the SaXcell technology is the processing of cotton waste into raw material, which can be used in standard downstream textile processes and leads to a high-end product. This type of recycling of cotton waste was, until now, not possible. The developed knowledge within the area of pulp properties and pulp production leads to the production of the innovative SaXcell ber with unique characteristics, namely:

- A higher tensile strength than cotton and regenerated fibres
- Very fine yarns can be spun
- A better depth of colour
- It can be processed on existing machinery



Contributors



Abhijit Niyogi

Tata Consultancy Services

Abhijit Niyogi is Business Unit Head, Retail at Tata Consultancy Services and is responsible for retail business and customer relationships across the UK, Europe, and India. With 29 years of experience across industries, Abhijit has played a pivotal role in helping numerous leading global retailers successfully embark on their digital and transformation journey, delivering innovative solutions, achieving efficiency and committed savings, and fostering sustainable growth. Abhijit's commitment to excellence and client-focused strategies underscores his impactful role in shaping the success of TCS's retail business.



Amit Gugnani

Technopak

Amit is a Senior Partner & Head, Fashion at Technopak. He has over 28 years of experience in Apparel Manufacturing, Sourcing, and Value chain strategy. He joined Technopak in 2005 and has contributed to developing the Apparel consulting practice in the subcontinent and Africa. He is certified in Lean Sigma Green belt.

Amit's versatile skill set encompasses various domains, including business strategy for apparel entry, new product entry and growth strategy for textiles value chain businesses, and apparel plant start-up initiatives covering woven shirts, knit tops, denim jeans, and bottoms, among others.

Amit also has a strong background in business process re-engineering, establishing KPIs for productivity and efficiency, and in developing operator and middle management skills and the deployment of Lean tools towards operational excellence.

Amit is a Masters in Fashion Technology from the National Institute of Fashion Technology, New Delhi, and a Bachelor's in Textile engineering from T.I.T.S, Bhiwani, India. Additionally, he has completed a Senior Leadership program from XLRI, India, further enhancing his strategic acumen and leadership capabilities.

Anirwan Bansriyar

Aquarelle India Pvt Ltd

Anirwan Bansriyar is Director Design & Development at Aquarelle India Pvt Ltd, Tropic India, a part of CIEL Group. A creative professional with 21 years of experience in design and fashion direction, he specialises in creating product strategies and digitalisation of processes. He has a forte in devising and executing new ideas and innovation to build a competitive advantage for the organisations.



Ashish Dhir

1Lattice

Ashish Dhir is Senior Director at 1Lattice and heads the Consumer & Retail vertical. He also leads the Government & Public Sector vertical at the firm. Dhir has varied experience of 25+ years in management consulting, strategy and business





**INDIA
BUSINESS OF
FASHION
REPORT
2024**

**IMAGES
YEARBOOK**
VOLUME XX . NO.1

Cover Price
₹ 5000 | US\$ 150