

**IMPACT**

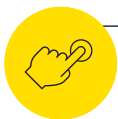
**REPORT**

**2022**

FASHION ROUNDTABLE



This is an interactive report. Please use the main menu, contents page and hyperlinks to navigate your way through.



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# WHO WE ARE

**Fashion Roundtable is the leading think tank** for the fashion industry, improving the sector by impacting public policy on education, inclusion, ethics, sustainability and business.

We collaborate with the UK Government and Parliament to create prosperity for business, people and planet. As the Secretariat for the All-Party Parliamentary Group (APPG) for Ethics and Sustainability in Fashion, we are uniquely placed to advocate on behalf of the industry.

Fashion Roundtable have consistently been the first to address the challenges of Brexit, Covid-19, climate change, exploitative working practices and inclusion in fashion. We use our platform to highlight inequalities across the fashion industry and to effect long-lasting social, business and environmental change.



**Meaningful changes to the fashion system are not possible without policy change.**

**There is currently a licence to do harm. Fashion Roundtable has a critical role with their distinctive positioning to make meaningful change.**

**Professor Dilys Williams**  
Fashion Roundtable Board Member



# 2022 A YEAR OF IMPACT AND INFLUENCE

Following the policy recommendations developed and produced in Fashion Roundtable's 2021 reports, 2022 was a year for spreading the word. We were called upon time and time again, to provide our unique insights across some of the best publications and networks in the UK and globally, including Vogue Business, CGTN, BBC News, The Independent, and The Telegraph. Our CEO represented the UK at CHOGM 2022 in Kigali, Rwanda, was featured on BBC Sounds, and panel talks such as Drapers. Team members also spoke at circular events, for institutions such as the Centre for Circular Design.

Our CEO chaired the recent UK Trade and Business Commission evidence session on the textiles and fashion industry, as well as the session looking at the UK-India Free Trade Agreement. Through our policy work, we briefed ministers regularly on the issues facing our sector. We fed many questions into Parliament across the country on issues surrounding the textile and manufacturing sector; fibres; localism in supply chains; as well as issues of modern-day slavery.

As Secretariat for the Ethics and Sustainability in

Fashion APPG we supported their AGM, boosting our parliamentary membership to become one of the largest APPGs, and a packed meeting on Extended Producer Responsibility (EPR). Speakers such as George Harding-Rolls from Changing Markets, Professor Dilys Williams from the Centre for Sustainable Fashion, and Anthony Burns, the CEO of ACS Clothing, brought these issues to life.

We are proud of the work we did in pushing forward policies and agendas much needed by the fashion and textiles industry to ensure it makes real moves towards sustainability, respects human rights, and remains a creative and expressive sector.

Our report for the ACS Treasury Meeting analysed the opportunities for reducing VAT on sustainable fashion brands and associated services. In the midst of a cost-of-living crisis, as we come out of the pandemic and post Brexit, Fashion Roundtable would like to see the same levels of support for our sector that other industries enjoy and in the case of the UK-film industry for instance, has made them thriving success stories.

Our Waste Strategy Report focused on solutions for waste strategy around Extended Producer Responsibility (EPR) in response to a request from DEFRA. We brought our experts and Sustainability and Social Justice Committee to collate data, offer key insights and expertise. The end-of-life stage of our fashion items is the biggest issue facing the sector in the coming years, as legislation changes

to meet a growing demand for extended producer responsibility.

Our Welsh Wool Report included our recommendations for the wool sector in Wales following our roundtable in collaboration with Menter Môn, as part of the latter's scoping studies. We addressed the issues facing rural economies, wool producers, and brands across the wool value chain and

proposed solutions and strategies to enable the greater usage of wool from Wales' regional fibre flock of 10 million sheep.

On top of this, a year to the day since the publication of our Cleaning Up Fashion Report in July 2021 which recommended a fashion adjudicator, or watchdog, there was a first reading

of a Fashion Supply Chain (Code and Adjudicator) Bill in the House of Commons, led by Liz Twist MP.

We are proud of the work we did in pushing forward policies and agendas much needed by the fashion and textiles industry to ensure it makes real moves towards sustainability, respects human rights, and remains a creative and expressive sector.



24

ARTICLES AND MENTIONS  
IN THE MEDIA

71,600

MET THROUGH  
SOCIAL MEDIA CAMPAIGNS

2.2bn

GLOBAL MEDIA REACH

ESF APPG MEETING  
IN PARLIAMENT ON  
**EXTENDED PRODUCER  
RESPONSIBILITY**

# KEY ACHIEVEMENTS

16

PARLIAMENT MENTIONS

3

REPORTS LAUNCHED

2

PACKED  
**WOOL ROUNDTABLES**  
IN COLLABORATION WITH  
**MENTOR MÔN**  
AND  
**PRICKLY THISTLE SCOTLAND**

**FASHION SUPPLY CHAIN  
(CODE AND ADJUDICATOR)  
BILL INTRODUCED**  
IN PARLIAMENT  
NOVEMBER 2022,  
ESF APPG HOSTED  
A MEETING ON THIS TOPIC  
IN DECEMBER 2021

i  
**WELSH WOOL REPORT**

ii  
**WASTE STRATEGY REPORT**

iii  
ACS TREASURY  
MEETING REPORT  
-  
**VAT REDUCTION  
FOR SUSTAINABLE  
FASHION BRANDS**

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FRONT ROW TO FRONT  
BENCH **PODCASTS**



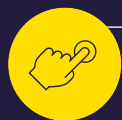
# REPORT LAUNCHES

In 2022, Fashion Roundtable  
launched three research papers

**Waste Strategy Report**

**Welsh Wool Report**

**ACS Treasury Meeting Report**



# WASTE STRATEGY



The **Waste Strategy Report** was developed in response to a request from DEFRA and examines the challenges and opportunities in the development of an Extended Producer Responsibility policy for textiles in the UK. The report compares and contrasts similar policies being implemented, or due for implementation across other countries and groups, including the EU. Brought together by

sustainability experts in our Sustainability and Social Justice Committee, they developed a red and green light system to identify the challenges (red) and provide solutions (green). Key takeaways include the need to consider potential unintended consequences e.g. if exports to Global South become a cheap work around, worsening the crisis of dumped textiles already created.



The Ethics and Sustainability in Fashion All-Party Parliamentary Group recently held a meeting on Extended Producer Responsibility (EPR). This session was particularly insightful and allowed for industry leaders, which Fashion Roundtable curated, to speak on the issues around this at length. This session has enabled me to have the knowledge in this space moving forward, which is fundamental, particularly as policy will continue with an EPR focus.

**John McNally MP**

SNP spokesperson on the Environment,  
Member of the Environment Audit Committee,  
and co-chair of the Ethics and Sustainability  
in Fashion All-Party Parliamentary Group





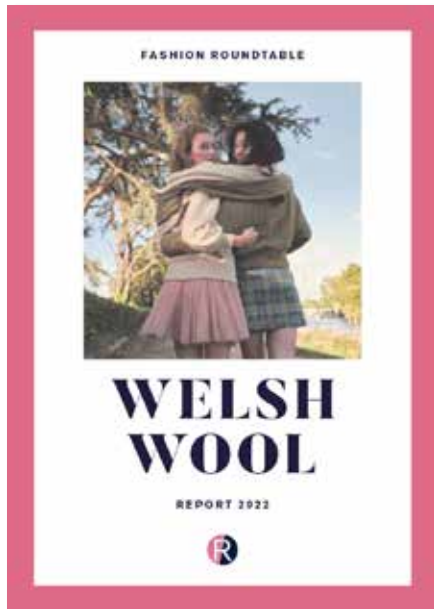
The end-of-life story for our clothes is going to be the next big issue facing businesses and consumers. We all thought for many years that giving to charity, or putting items in the recycling bin was enough. Clearly, given the work of The Or Foundation and other organisations in the Global South, it isn't. We hope that our analysis and subsequent report will support The Government towards legislation which enables the industry towards greater sustainability and transparency targets, as we are seeing in the EU with their strategy for sustainable and circular textiles.

-  
**Tamara Cincik**  
 CEO Fashion Roundtable





# WELSH WOOL



Over the past year and a half, Fashion Roundtable have been developing a strategy for wool in the UK, speaking and connecting with individuals and organisations around the country who work in the wool industry - be that farmers, makers, spinners, dyers, iconoclastic stakeholders, brands, and many more. In 2022 this culminated in a collaboration with Mentor Môn to host a Wool Roundtable in order to further gather views, ideas, suggestions and solutions on how to combat the effects of

Brexit, Covid, and decreasing wool prices on the sector, its farmers, and creatives. The key finding from this space was that amongst the challenging statistics that there is real creativity, potential, and excitement that can be built from having sustainable wool supply chains feeding into fashion and design. However, wool's clear provenance story was the most obvious missed opportunity and an area which merino wool was currently dominating in.



**78p/kg**

Farmers receive on average 78p per kilo (roughly 1-2kg per sheep).

**1%**

Wool represents only 1% of the global- fibre market.

## UK supply chain

Mills want their own UK-based supply chain - currently the supply chain is too disjointed and Covid and Brexit have caused chaos.

**>212**

Welsh mills have dwindled from 217 to 5 in the last century.

## sector mapping

Governmental support is required for a full mapping of the sector and shared open access data share, with free access to allow for replicability over scalability, allowing for data from every facet of the sector to be gathered, mapped and analysed. The purpose of this is to connect the fragmented nature of the woollen industry so that gaps can be identified and tackled. Fashion Roundtable are seeking to lead on this.

**90%**

of the UK garment and textiles manufacturing industry has been lost in the last 30 years.

## provenance

There is a need to step away from the term 'British' wool and instead focus on the provenance story, connecting unique and limited edition finite breeds with appropriate end users to achieve a greater value. Generalisation of Welsh wool is impeding on the narrative around quality.

**83%**

There is an 83% increase in interest in onshoring manufacturing.



# SUSTAINABLE FASHION BUSINESS VAT REDUCTION

Fashion Roundtable collaborated with the team at ACS to produce a report for the Treasury on the viability for VAT reduction for sustainable fashion businesses in the UK. The report included background on the fashion sector and its contribution to the UK economy and employment numbers, depiction of sustainability in fashion and its differing definitions, business models, and opportunities.

ACS CEO, Michael Cusack said:

“Fashion Roundtable is an exceptional organisation who we highly recommend.

“We recently engaged with them to undertake some research on our behalf on the current fashion market to help us with a proposal to the treasury and HMRC to eliminate VAT from sustainable

fashion products and services. Both we and our clients were very impressed—their expert input had a major bearing on the success of the meeting.

“We look forward to future engagements with Fashion Roundtable, our research collaborator of choice.

“A VAT reduction will level the playing field between fast fashion and smaller sustainable fashionistas like us. In what is a price sensitive market it makes sustainable fashion services such as ours more competitive, thus attractive to consumers. The increased volumes would enable us to scale up our operations and achieve economies of scale resulting in operational cost reductions which would be passed on to the consumer and underpinned with the associated environmental and social impacts from our circular fashion models. It quite literally

“

**A VAT reduction will level the playing field between fast fashion and smaller sustainable fashionistas like us.**

”

saves the planet. If the UK Government seized this legislative opportunity, it would have global impact depicting the UK as a leader in sustainability.

“I hope and pray that we can make this happen.”

Fashion Roundtable's CEO, Tamara Cincik, noted the importance of replicating the benefits provided to other creative industries within the UK to allow those creating sustainable fashion opportunities and solutions to be able to flourish.





**The scope for incentivising businesses to onshore their production and manufacturing in the UK, while simultaneously combining this opportunity with the government’s ambitions to drive innovation and the UK towards net zero, and more environmentally visionary objectives, is extremely compelling. It would provide the UK with a tangible opportunity to show real global leadership post COP26. The UK excels at green tech innovation and sustainability. Adding incentives to support this will boost opportunities for inward investment, growth and support the levelling up agenda across the country.**

**The UK’s film industry is booming, with more domicile film and TV productions enjoying greater market share success than ever. This is largely thanks to the government’s decision to offer tax incentives for productions making all, or a part of their film production here.**

ACS Treasury Report





# IMPACT

MSP Maurice Golden said:

“Wool is a fantastic natural resource. It’s warm, durable and, of course, sustainable.

“Sadly though, Scotland is not using this incredible material to its fullest potential. That’s bad for consumers looking for high quality, good value clothing, bad for the future of our wool farmers and bad for our environment when fossil fuel derived fibres are used instead.

“We need a proper plan for wool at every stage of the supply chain – fibre production, product design and ultimately consumer sales and use. I am raising those issues with the Scottish Government, putting the questions directly to ministers and working alongside like minded people, such as Fashion Roundtable, to push this campaign forward.”





Fashion Roundtable have played an integral part in highlighting and raising issues around Scotland's wool production sector.

**Maurice Golden**  
MSP

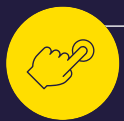


# NEXT STEPS

As promised in our 2021 Impact Report, we took the recommendations we made, and research we developed and pushed for change and innovation. We engaged with ministers, members, government departments, CSOs, and many more throughout our industry.

We have seen successes, but that change cannot come in a year, and our next steps for 2023 will be much the same, if not doubling down, on our efforts of the past year. We will continue to follow through on our key recommendations from Cleaning Up Strategy (built upon by our three reports from 2023) and R&I reports to further the potential of the sector and its employees, and to decrease its environmental impacts.

Testing and implementation are key to understanding and convincing others of the potential behind many of these solutions. In the year ahead we look to continue to partner and collaborate with researchers and pilot projects that can demonstrate what wider roll outs of policy can achieve.





**Fashion Roundtable is a much-needed think tank for the UK fashion and textile industry. They ask the important questions and are not afraid to question the status quo, which so many other organisations representing our industry are not prepared to do. We need these important conversations to move the industry forward and have our voice heard in Parliament.**

—

**Kate Hills**  
CEO and Founder, Make It British



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**LET'S TALK**



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FRONT ROW TO FRONT BENCH