

CO

CO DATA

Mapping the Global Fashion Industry

Key Findings

2018



DO

\$£

Everything you need to know about the global fashion industry to achieve sustainable success.

Mapping the Fashion Industry is CO's signature research report, broken down into five major sections and 40 bite-sized articles, looking at the size and impact of the global fashion industry.

Drawn from over 500 data sources, it provides a baseline to help you benchmark your business and drive better practices.

These key findings provide an insight into the expert data and the unique birds-eye-view that the report provides.

Visit commonobjective.co to access the full report



01 The Retail Market

Fashion is a complex, multi-layered and sprawling industry with sectors that generate incomes to rival the economic output of entire countries.

Volume continues to grow, particularly in low-value items, and the top ten consumer countries account for three-quarters of the clothes sold each year.

Part 1 of Mapping the Industry covers:

- Apparel
- Footwear
- Jewellery
- Sustainable fashion
- Second-hand clothing

[View all of Part 1 here on CO](#)

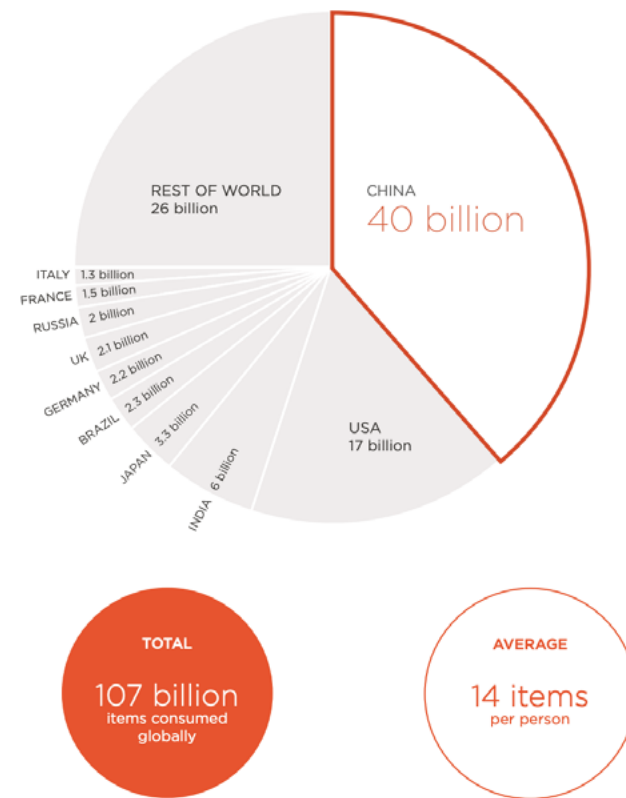


Figure: Apparel units purchased, 2017



THE RETAIL MARKET: KEY FINDINGS

A vast industry

1

Global retail value
\$2 trillion

The global apparel market alone is worth \$1.34 trillion a year in retail sales. If footwear and jewellery are included, global annual retail sales would be around \$2 trillion per year – just a bit smaller than India’s economy.

2

Volume
107 billion items

107 billion items of clothing were purchased in 2017. China accounted for one-third of the total while Americans consumed the most per capita, averaging one new item of clothing per week.

3

The sustainable market
Less than 1%?

While 2017 was the year Vogue claimed that ‘sustainability got sexy’, and Google searches for ‘sustainable fashion’ grew by nearly 50%, CO’s research shows that sustainable fashion accounted for less than 1% of the UK high street’s total offering to consumers.

02 Global Production

Discussions about the garment sector often overlook the different stages through which raw fibre is transformed into the final garment.

These stages are, however, key to tracking the environmental and social impacts of the industry. So it is worth drilling down into the data available to assess their scale, value and chief locations.

Part 2 of Mapping the Industry covers:

- Fibres & fabric production
- The manufacturing sector
- Sustainable manufacturing
- Jewellery production

[View all of Part 2 here on CO](#)

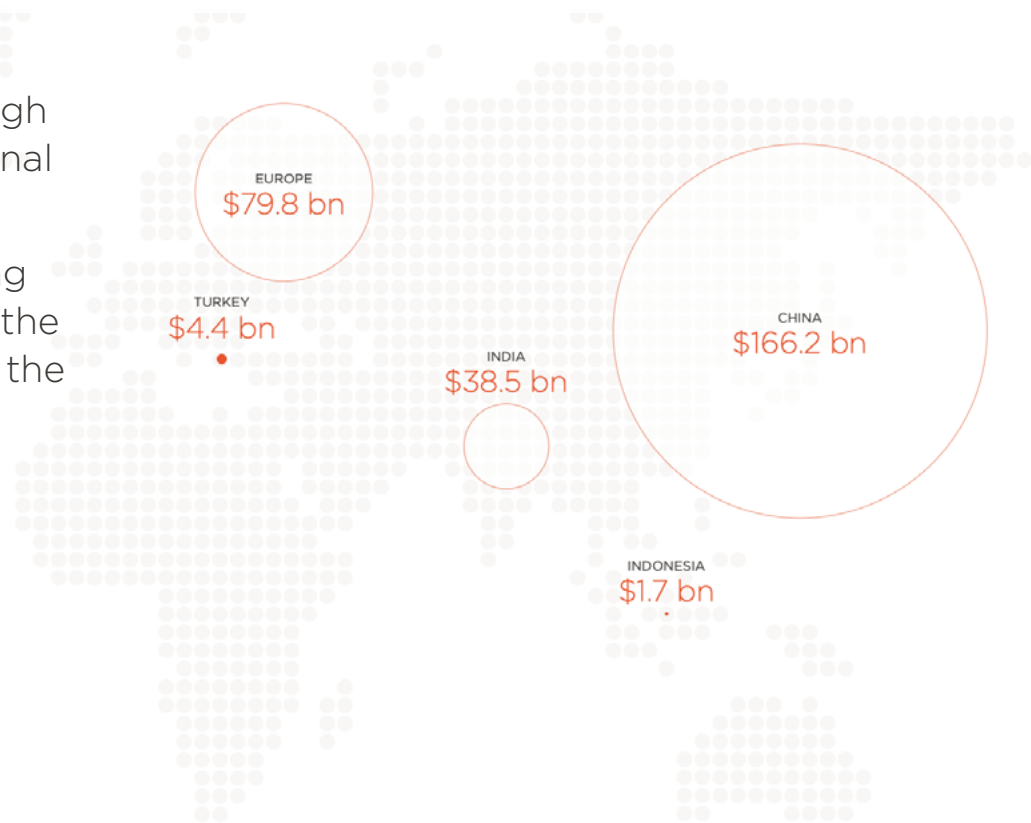


Figure: Value of apparel production, 2016



GLOBAL PRODUCTION: KEY FINDINGS

Production power players

1

Global trade flows
**4 countries export
80% of all cotton**

Many countries are involved in the international trade of basic inputs and final product in the fashion industry, but relatively few countries dominate. For example, 92 countries reported cotton exports in 2016, but just four countries accounted for 79.5% of these exports.

2

Producing fashion
**1 in 3 garments are
made in China**

China is a powerhouse when it comes to the fashion supply chain. It produces more than a quarter of the industry's fibres and fabrics, and one in three garments sold globally is produced there.

3

Ethical manufacturing
**2% of factories
certified**

Of the 1.3 million factories and mills involved in garment supply chains, just over 2% are certified or part of a scheme that encourages good environmental practices, labour rights, or fair trade standards.

03 Impact on People

Millions of people are employed in the complex and interconnected chains that make up the global fashion industry. How the industry functions – from raw material production and processing to the manufacture and supply of goods – directly affects the people involved.

Part 3 of this report focuses on that impact – on the workers themselves both adults and children, and also on their families and communities.

Part 3 of Mapping the Industry covers:

- Impact on workers
- Impact on children

[View all of Part 3 here on CO](#)



Figure: 14 million garment workers are paid just over the minimum wage, which itself is less than half of a living wage



IMPACT ON PEOPLE: KEY FINDINGS

Workers and communities at risk

1

Employment
181m people in vulnerable work

The fashion industry, taken as a whole, is a major provider of work to adults. However it is estimated that 181 million people are in vulnerable, or insecure, work. That's just over 2.2% of the world's population.

2

Working hours
17.4 hrs worked per day in Bangladesh

Alongside low pay, excessively long hours are a major concern for garment workers. Indeed the two intersect, with workers agreeing to work overtime to boost poor wages in order to earn enough to live.

3

Children
22m children left behind in China

Migration between, and within, garment-producing countries is highly prevalent, having indirect impacts on the children of garment workers. One study estimated that 22 million school-age children in China were left behind by migrating parents.

04 Impact on Planet

Fashion is often branded as the second most polluting industry in the world after the oil and gas sector. Whether this is true is difficult to tell – the lack of supply chain transparency and fashion’s interactions with other major polluting industries both cloud the picture somewhat.

Enough data exists however, to show that fashion is one of the worst polluters on the planet.

Part 4 of Mapping the Industry covers:

- Ecological impact
- Waste
- Impact on animals



Figure: Numbers of livestock used for leather, 2016

[View all of Part 4 here on CO](#)



IMPACT ON PLANET: KEY FINDINGS

A huge footprint

1

Climate change **4th largest CO2 emitter globally**

1.75 billion tonnes of CO2 were emitted by the fashion industry in 2016, not including emissions from freight transport - and this is expected to grow by 60% to 2030. If it were a country, fashion would be the 4th largest CO2 emitter in the world.

2

Waste **80% of clothing to landfill or incineration**

Waste occurs throughout a garment's life cycle, from the cutting room floor to the consumer's rubbish bin. This culminates in 82% of discarded clothing either going to landfill or incineration each year.

3

Animals **3.7 billion animals killed for leather**

Billions of animals provide source material for fashion, including leather, silk and fur. Industry practices can also adversely affect biodiversity, leading to a loss of animal habitats and species.

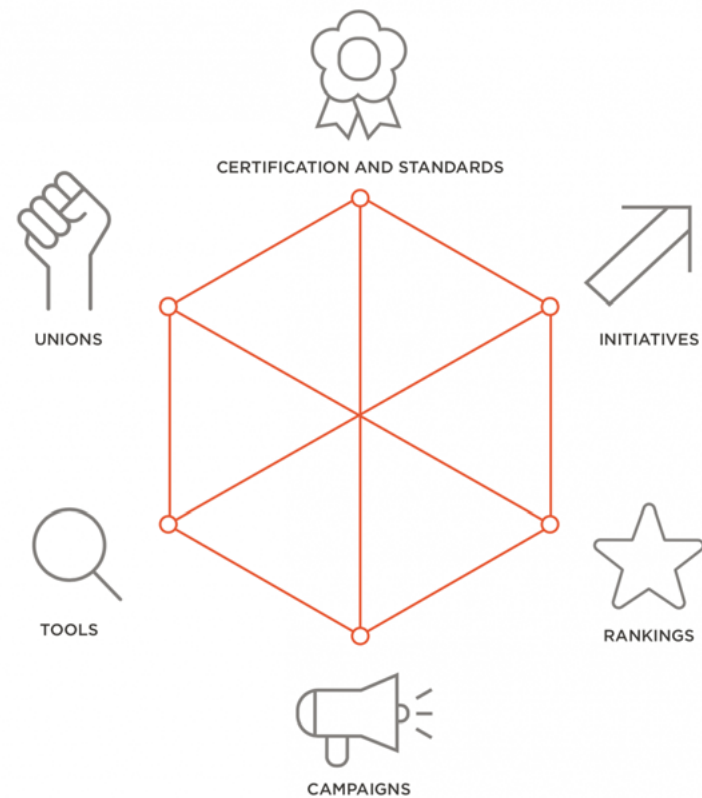
05 Solutions

The negative social and environmental impacts of the globalised fashion industry first came to public awareness in the 1990s – for example, through campaigns against sportswear companies for use of child labour.

Since then, there have been a number of responses from the industry, from governments, from international institutions and from non-governmental organisations and trade unions.

Part 5 provides a brief introduction to the 100+ global institutional responses and the role they play in the industry.

[View Part 5 here on CO](#)





SOLUTIONS: KEY FINDINGS

Collaboration is key

1

Certifications

38 certified standards

Standards dominate the list of global responses. However, garments produced in certified factories currently account for a tiny portion (2.2%) of the market. While there has been criticism around the robustness of certifications, they do play a role in providing concrete actions for improving standards.

2

Trade unions

1 global union

One global union, IndustriALL, covers textile and garment workers around the world, although there are hundreds of national-level unions. The exception to this is China, where there are no free and independent trade unions.

3

Institutional solutions

100+ global responses

While these attempts to fix fashion are to be applauded, they do beg several questions:

- Are current actions really making enough of a difference?
- Is the response too fragmented?
- What role could governments and international institutions play?

Get this data and more

Access the full Mapping the
Industry report on CO:

www.commonobjective.co/hubs/mapping-the-global-fashion-industry

COMMON OBJECTIVE

info@commonobjective.co