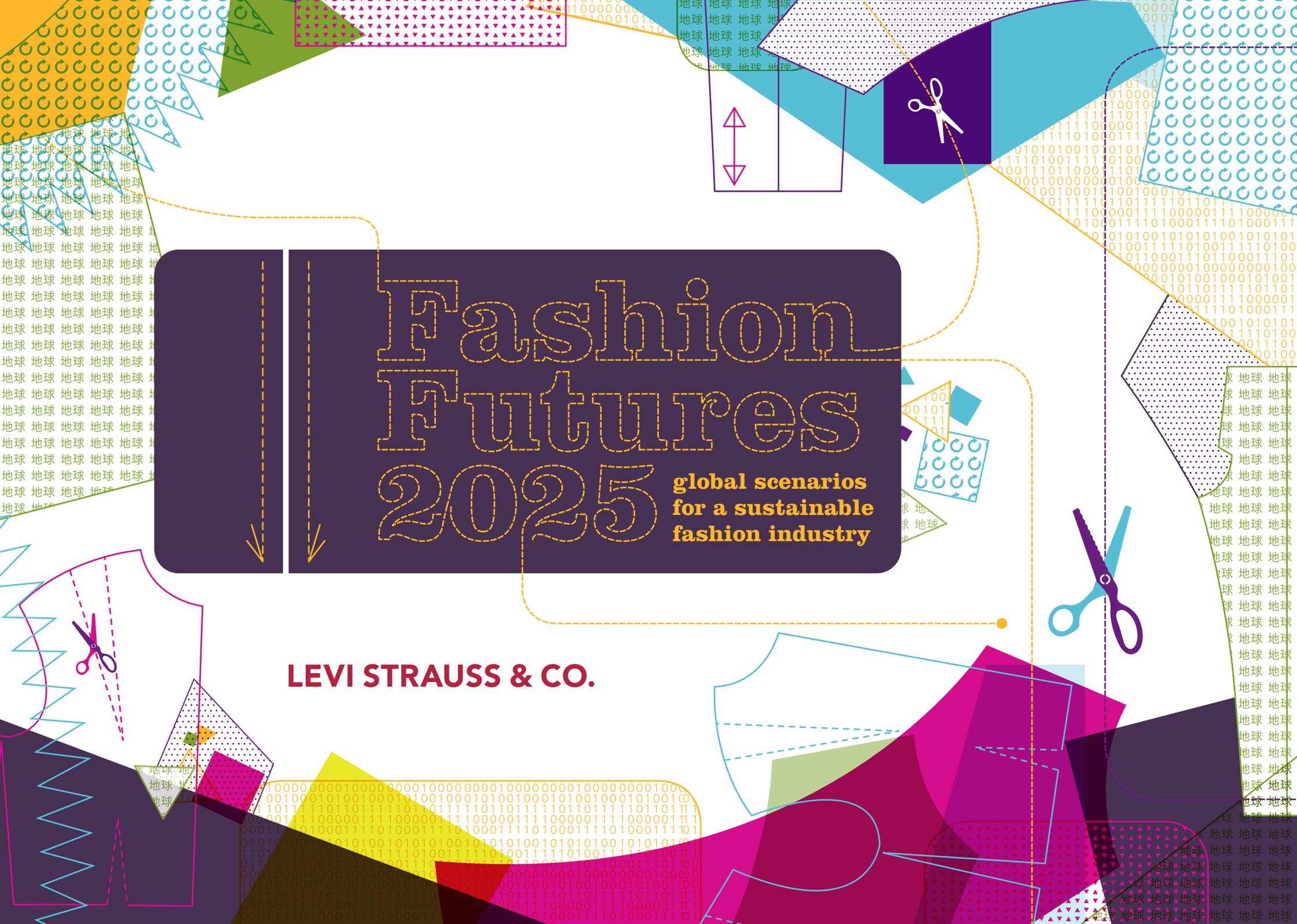


Fashion Futures 2025

global scenarios for a sustainable fashion industry

LEVI STRAUSS & CO.



executive summary

Fashion is a big deal. The global apparel, accessories and luxury goods market generated total revenues of \$1,334.1 billion in 2008.¹ And the opportunity for the industry to have a positive impact on global society and the environment is just as significant as its economic clout.

The fashion industry brings many benefits to everyday lives across the globe. Fashion goes beyond simple clothing to express identity, create well-being, embrace creativity and connect global communities. But like all industries there's a negative side, characterised at its worst by factories exploiting workers, generating throwaway fashion, wasting resources and encouraging unsustainable consumption.

Fashion Futures is a call for a sustainable fashion industry. We want companies in all sectors to wake up to the immense challenges that are already shaping our world, to address the serious risks and seize the rich opportunities they present. It's designed to help them take action which will safeguard their future, protect our environment and improve the lives of their customers, workers and suppliers around the world.

Climate change, population growth, and shortages of key resources are already affecting the industry and they will bring profound changes over the next 15 years. By 2025 there are expected to be another billion people living on this planet and twice as many elderly people. Climate change will have major impacts on agriculture and patterns of global land use. Many communities will change radically, affecting the needs of the industry's customers and the availability of labour. Demand for energy, water and food will grow, prices are likely to rise and control of resources will be a key political issue.

Other factors will shape our world in less predictable ways. China, India and other emerging economies will change global patterns of trade and power and exercise a growing cultural influence. Technology will continue to transform our lives and businesses and create new opportunities – think of the impact the internet has had in the last 15 years. People's attitudes to resource shortages, climate change and sustainability, and their levels of disposable income, will affect consumer demand. How governments act, or fail to act, on trade, economics, the environment and poverty, and how they coordinate action on these and other global issues will also have a huge impact.

The future is likely to be dramatically different from today. We have created four scenarios, exploring the challenges ahead for the fashion industry and its current business models.

They cover a wide range of issues and pose some searching questions:

- > How will the industry react to shortages of cotton and other raw materials?
- > How could the fashion workforce be affected by shifting supply chains and technological development?
- > How might technology influence fashion and change the way it is produced and sold?
- > How will people care for their clothes in a future of water shortages and high energy prices?
- > How could reuse and remanufacturing of clothing develop as a response to higher demand and prices?

The four scenarios explore worlds where globalisation has progressed or gone into reverse and where society and its fashions change more or less rapidly than today. (See panel.)

They are intended to be plausible, coherent, challenging descriptions of possible future worlds and the nature of the fashion industry within them. They are not predictions but a tool designed to challenge companies' ideas, inspire them with new opportunities and help them plan for the future.

scenarios for 2025

1. slow is beautiful

A world of political collaboration and global trade where slow and sustainable is fashionable.

2. community couture

Where high-tech systems deliver for the speed-obsessed global shopper.

3. techno-chic

Where resource crises constrain consumption in a world focused on local communities.

4. patchwork planet

A world of fast consumption in global cultural blocs.

The scenarios demonstrate the urgent commercial imperative for the industry, and the businesses within it, to rise to the challenge of the future and become sustainable. They also highlight the opportunity for pioneering companies to step up and lead the industry with business models, products and services that will thrive in a sustainable future.

¹ Consumer Goods: Global Industry Guide, Datamonitor, March 2009. The apparel, accessories and luxury goods market consists of mens, womens and infants clothing, jewelry, watches and leather goods.

five lessons for the fashion industry

Fashion Futures is a joint project between Forum for the Future and Levi Strauss & Co. It is aimed at all those within the global fashion industry, from suppliers of raw materials, designers and manufacturers right through to big brands and niche retail outlets. It should also be of use to others involved in the industry including government officials, academics and civil society.

It draws on the Forum's expertise in futures thinking and a series of in-depth interviews and peer reviews with fashion experts from around the world – in academia, trade unions, NGOs, manufacturing, design and retail.

We've drawn out five lessons for the industry:

1. Prepare now for a radically different and uncertain future

Companies should prepare now and put strategies in place for a variety of scenarios. They should carry out a risk assessment of their business models and supply chains; put together a sustainability roadmap covering the full product/service lifecycle; and ensure they understand the social and environmental context in which their products and services are used.

2. Seize the opportunity to be a trailblazer

Companies can gain first mover advantage by taking action on quick wins, such as energy efficiency. They can also benefit from taking the lead in talking to consumers and investors about the importance of sustainable production and consumption, lobbying government and driving collective industry action.

3. Put change into practice

In a world which is changing rapidly and unpredictably success will depend more than ever on being flexible and innovative. Companies should invest in design and innovation; explore new business models and ownership structures; and trial new ideas to see what works.

4. Look out for unexpected competition

Many different industries now play a part in the fashion industry, from Information and Communications Technology (ICT) and sport to supermarkets and pharmaceuticals, and new competition can emerge from unexpected areas. Companies should embrace alliances with new partners where this can enable sustainable growth. They should also consider how to apply their core competencies to new markets.

5. Develop skills for a new world

Companies should start developing the skills they will need to be successful in the future. The industry will need climate change experts, water policy specialists, innovators with skills in design for disassembly and closed-loop manufacturing and many more. Businesses should also explore trends where the customer becomes a supplier, designer and seller as well as a buyer of fashion.

“ Companies need to be seeding innovation and new ideas now in order to thrive in a resource-constrained world. We need thought-provoking research like Fashion Futures to help us collaborate and advocate for the right future solutions around the most important issues on sustainability.”

Hannah Jones

Vice President Sustainable Business and Innovation
Nike Inc.

“ Fashion Futures makes an important contribution to the longer-term sustainability of clothing production. By providing four provocative scenarios of future worlds in 2025, Fashion Futures can help companies develop responses to key social and environmental challenges.”

Mike Barry

Head of Sustainable Business
Marks and Spencer

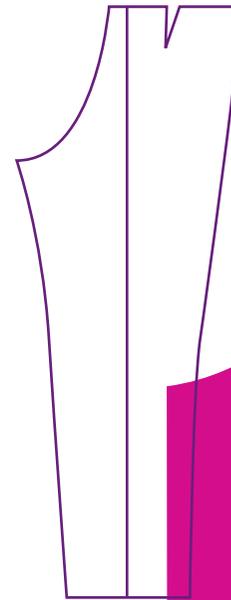
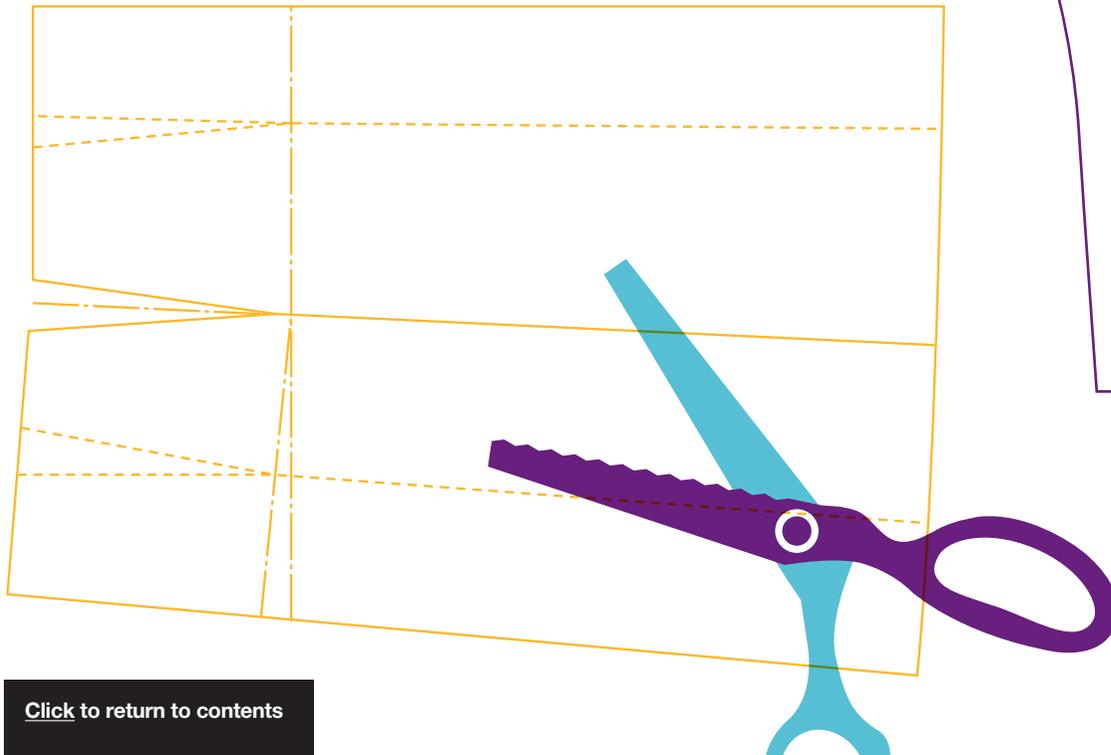
how to use fashion futures

It takes innovative thinking and an open mind to think ahead and explore the routes which will lead your business to a successful future. The Fashion Futures scenarios are designed as a tool to help you chart the course which is right for you: to avoid the risks, seize new opportunities and play your part in creating a future which is good for your business and your society.

Businesses can use the scenarios to future-proof current business models and processes, to develop a vision of where they want to go and a strategy to get there, to inspire innovation and to guide organisational development. We highlight these approaches with useful tips in the section 'How to use the Fashion Futures scenarios'. Further materials are available for download from: <http://www.forumforthefuture.org/projects/fashion-futures>

Forum for the Future also designed and led a university module, based on the scenarios, with students from the London College of Fashion's MA 'Fashion & the Environment' in 2009. Inspired by the scenarios, students proposed and visualised fashion product and service solutions that would flourish in 2025.

Universities and colleges can use Fashion Futures in a similar way. Our pilot with the London College of Fashion has been successful in challenging and inspiring the students to deliver innovative fashion solutions for a changing world. Tips, workshop materials and module outlines are available to download from: <http://www.forumforthefuture.org/projects/fashion-futures>



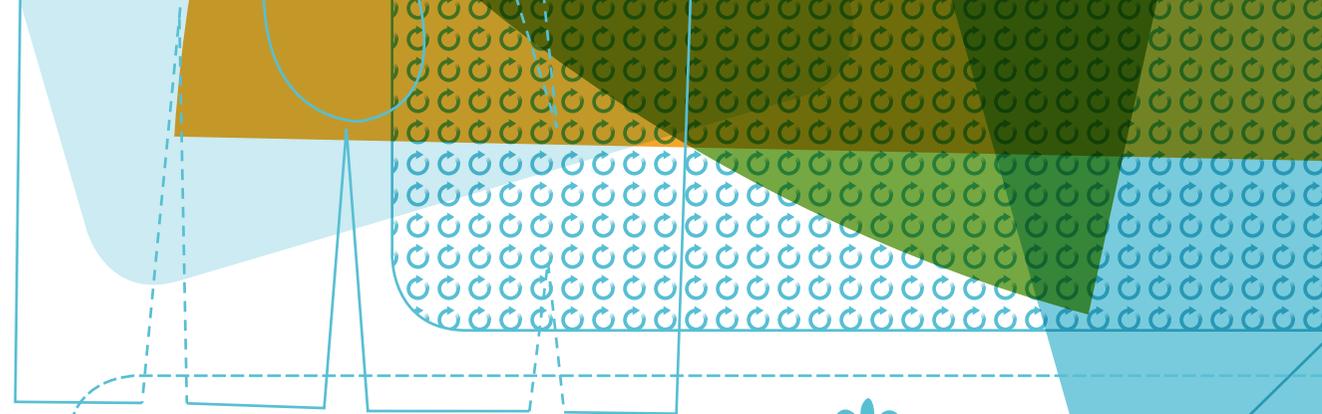
“ Designers need to design for the future, not just for now, and Fashion Futures will challenge and inspire their thinking.”

Dilys Williams,
Director of Sustainable Fashion
London College of Fashion



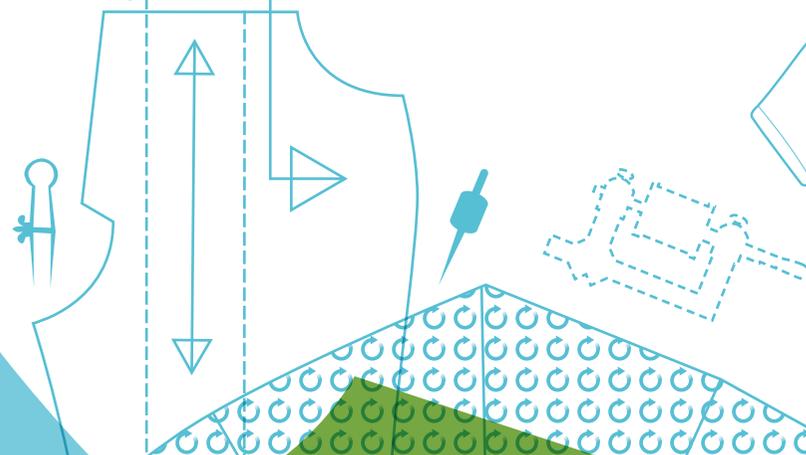
scenario 1: slow is beautiful

1. **The world is...** moralistic, risk-averse, low-carbon, tightly regulated with sustainable lifestyles and mindsets.
2. **Fashion is...** über sustainable and über cool... most consumers are prepared to pay more for a smaller number of high-quality sustainable clothing items.
3. **The fabrics we wear are...** durable... organic natural fibres... man-made materials from renewable resources... handcrafted, vintage, second-hand... 'smart clothes' monitoring health.
4. **We get our clothes...** from small or virtual stores with hyper-efficient logistics or we swap with friends.
5. **Clothes are made...** in different regions of the world according to the manufacturing processes they require... India and Nigeria have big 'refurbished clothing' industries... most workers are paid a 'living wage'.
6. **We care for clothes...** without harmful chemicals... clothes last longer and are washed less at low temperatures.
7. **When we have finished with clothes...** we take them back to where we bought them to be shipped and remanufactured in Japan.
8. **The industry is sustainable through...** SustainGrade labelling and digital tagging, ensuring consumers know exactly where their clothes have come from and what impact they've had... but a 'grey economy' with poor labour standards still exists to satisfy those who refuse to conform to the new, slower world order.
9. **Successful fashion businesses are...** radically transparent: the most sustainable *and* best value.



Highlights

- > Climate change refugees transfer fashion influences across the world.
- > People turn to second-hand clothes to satisfy seasonal fashion trends – vBay is the hugely popular website dedicated to high-quality vintage clothing.
- > 'Smart' clothes with built-in monitors protect their wearers from disease and enhance their fitness; pharmaceutical companies are competing with the fashion industry.

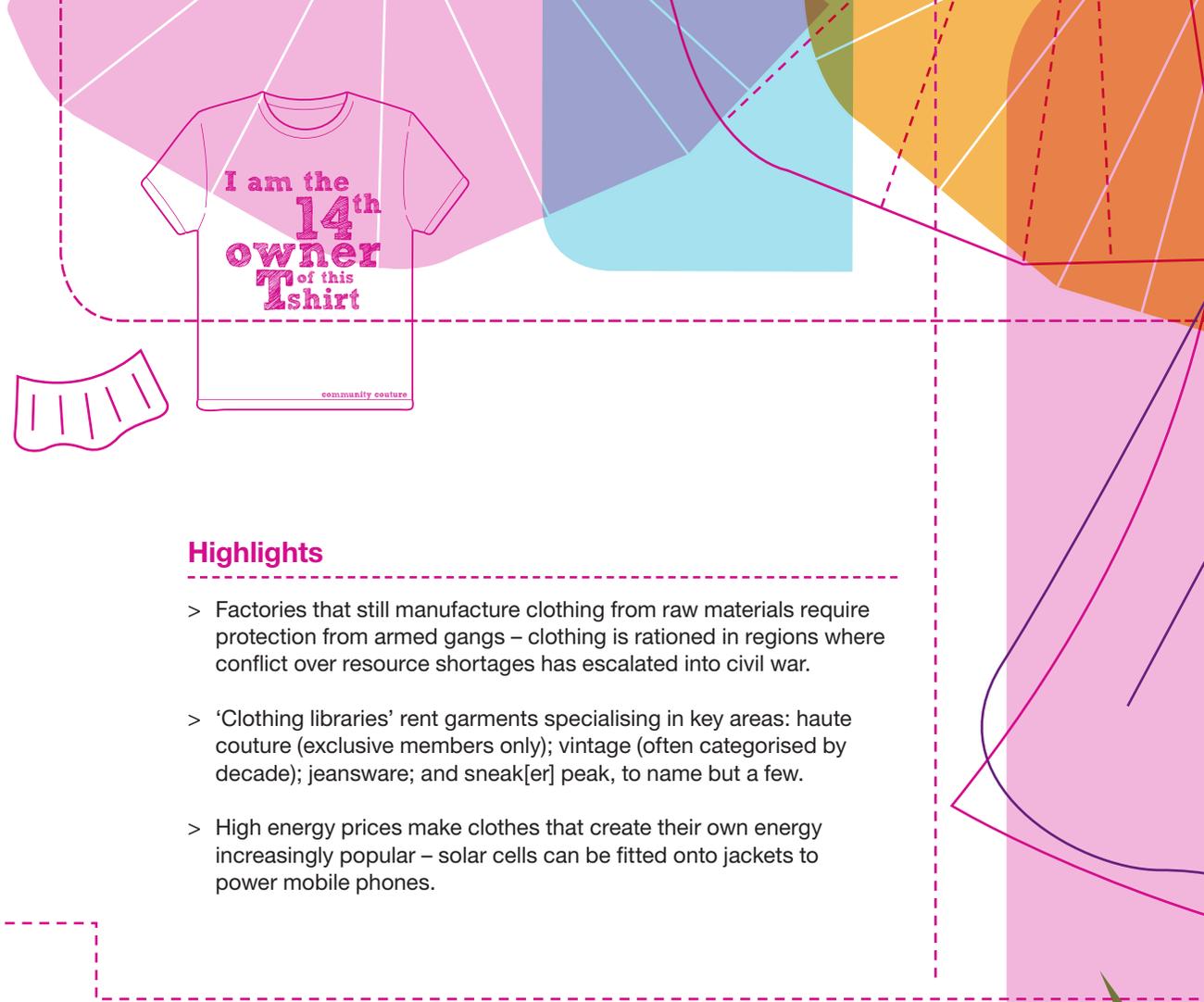


*No part of
the world has
been harmed in
the making of
this T shirt.*

Slow is Beautiful

scenario 2: community couture

1. **The world is...** struggling to cope with the impacts of climate change and resource shortages but community bonds are strong – many strive for self-sufficiency.
2. **Fashion is...** expensive new or cheap and second-hand... very high costs of raw materials and disrupted supply chains have resulted in a dramatic fall in the production and sale of new clothing.
3. **The fabrics we wear are...** second-hand, 'pre-loved' clothing... community-grown hemp... only the rich can afford 'certified new' clothes made from expensive synthetics or virgin raw materials.
4. **We get our clothes...** at vibrant second-hand markets with tailors and stylists on hand, in retail stores with extra security, on the black market or from clothing libraries.
5. **Clothes are made...** at home or in community-run recycling centres linked to local, hyper-efficient factories.
6. **We care for clothes...** using community laundries... one cup of water washing machines... 'make do and mend' is taught in schools.
7. **When we have finished with clothes...** we sell them back for reuse to boost our incomes.
8. **The industry is sustainable through...** second-hand clothing becoming a valuable resource... nothing is disposed of.
9. **Successful fashion businesses are...** part of the local community: providing energy supply, education and even food to employees.



Highlights

- > Factories that still manufacture clothing from raw materials require protection from armed gangs – clothing is rationed in regions where conflict over resource shortages has escalated into civil war.
- > 'Clothing libraries' rent garments specialising in key areas: haute couture (exclusive members only); vintage (often categorised by decade); jeansware; and sneak[er] peak, to name but a few.
- > High energy prices make clothes that create their own energy increasingly popular – solar cells can be fitted onto jackets to power mobile phones.

scenario 3: techno-chic

1. **The world is...** healthy, wealthy and ultra-high-tech – materialism is out of favour and the aim is ‘lightweight living’.
2. **Fashion is...** fast-paced, low-carbon and cheap.
3. **The fabrics we wear are...** made from new high-tech, low-impact fibres... biodegradable, non-toxic spray-on clothing... nano-tech fabrics... programmable clothing.
4. **We get our clothes...** using 3D body scanners that allow people to ‘try on’ clothes in virtual mirrors and on interactive screens.
5. **Clothes are made...** by machines not people... sharp declines in the use of labour create pockets of crippling unemployment... modular clothing is manufactured in China and delivered to stores to be customised to consumer demand.
6. **We care for clothes...** using high-tech, personalised clothing valet services... nano-tech coatings that reduce the need for washing (now recyclable)... ‘smart’ solutions for low-impact clothing care and advanced recycling networks.
7. **When we have finished with clothes...** they are composted, disassembled, remanufactured or reused according to design.
8. **The industry is sustainable through...** financially viable low-carbon, low-impact production... technology delivers sustainable solutions but some can’t keep up with the fast pace.
9. **Successful fashion businesses are...** consumer-obsessed: finding creative ways to keep their customers loyal and anticipating demand to avoid waste.



Highlights

- > Tour operators provide ‘holiday wardrobe’ packages that include a selection of local fashion items on your arrival – you can try on items virtually in advance and pre-select colour and styles.
- > ‘Crowd-sourcing’ fashion prevents overproduction and waste – customers vote online to choose which clothes should be made in which colours.
- > ‘Chameleon’ clothing, a spin-off from military camouflage, is a global craze – it offers a ‘blank canvas’ which can change colour and style, programmed to mimic the most popular celeb of the moment.

scenario 4: patchwork planet

- 1. The world is...** broken into cultural blocks with unequal economic performance – Asia is the economic and cultural powerhouse... there is conflict over scarce resources.
- 2. Fashion is...** strongly influenced by regional trends and celebs and highly personalised.
- 3. The fabrics we wear are...** made locally for local manufacture – bamboo in Asia, wool in Australia, flax in India... smart nano-tech materials... choice of colours is limited to save water and energy in dyeing.
- 4. We get our clothes...** online via mobile devices... consumers can personalise their clothes virtually.
- 5. Clothes are made...** in regional factories – short supply chains mean clothes reach consumers quickly.
- 6. We care for clothes...** according to wide regional differences... some have developed waterless washing machines, others use coatings to limit need for washing.
- 7. When we have finished with clothes...** they are (often illegally) dumped... edible clothing is a popular trend in Europe.
- 8. The industry is sustainable through...** a variety of locally appropriate strategies... sustainability know-how is guarded jealously so progress is slow and the world is struggling to cope with mounting social tensions and environmental constraints.
- 9. Successful fashion businesses are...** national heroes: companies with strong local heritage do best.

1
piece of
food only



Highlights

- > Nationalism encourages local fashion trends inspired by religious and cultural ideals. Across most of the Middle East, Western clothes are forbidden by law.
- > Clothing is designed so that it can be zipped, tucked and strapped on in order to create different looks in one. Brands provide post-purchase services, allowing owners to customise their clothing to follow local trends.
- > Resource shortages have driven innovation – clothes can be ‘grown’ from bacterial cellulose and self-cleaning coatings do away with the need to wash clothes.

