Am I trendy enough?

Team Brunei Adventurer
Aida Aimanuddin, Amirah Aliuddin
(Advisor: Muhammad Roil Bilad)

The fashion industry grow fast, partly due to the rise of ultra *fast fashion*, which relies on *cheap* manufacturing, *frequent* consumption and *short-lived* garment use.

Fashion is inherently **unsustainable** - masked by **GREENWASHING**

FAST FASHION BRANDS:
(NON EXHAUSTIVE)

boohoo ARKET COS Bershka

ZARA C&A GAP ESPRIT

H&M FASHION**NOVA** FOREVER 21

MANGO MONKI & other Stories

OYSHO Massimo Dutti NEWLOOK

MISSGUIDED NASTY GAL New Yorker SHEIN

PRIMARK asos PRETTYLITTLETHING

RIVER ISLAND stradivarius TOPSHOP
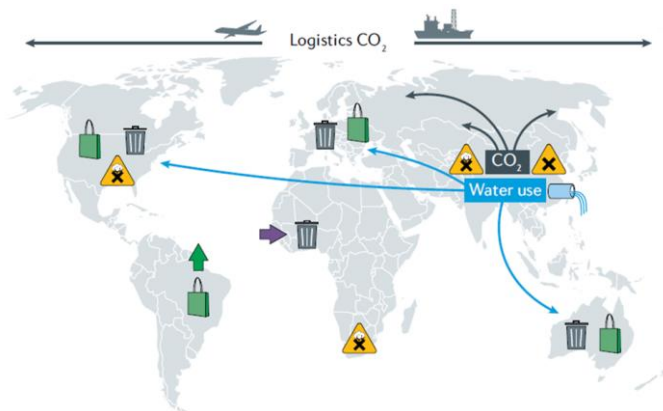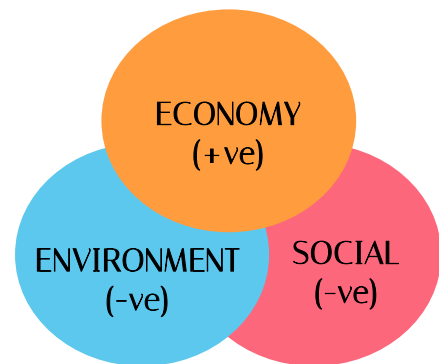
UNIQLO URBAN OUTFITTERS ZAFUL ROMWE

"Guilt free", "Ethical", "Vegan", "Recycled", "Organic", "Eco-friendly"," Sustainable"…

- H&M's collection is *climate -conscious*
- Zara aims for *100% sustainable*
- Prada, Adidas - *reuse plastic* in their backpack
- Balenciaga, Burberry - Claimed to be "*eco-friendly*"
- Coach pledges to *never destroy* unsold products
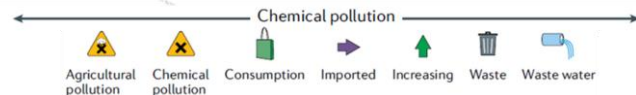- Chanel self-claim to be *climate conscious*

(Multiple sources, WION 2021).

Fashion industries claim they are sustainable **without saying HOW????**

FAST FASHION on **Global network** of garment manufacturing

ECONOMY (+ve)

ENVIRONMENT (-ve)

SOCIAL (-ve)

Logistics CO_2

Source: (Niinimäki et al., 2020).

Chemical pollution

Agricultural pollution | Chemical pollution | Consumption | Imported | Increasing | Waste | Waste water

CO_2

Water use

Source: (Niinimäki et al., 2020).

ENVIRONMENT

Textile dyeing and treatment release 20% of global industrial wastewater (UNECE, 2018).

About 8,000 synthetic chemicals are used in the textile industry, which end up into freshwater (The Guardian, 2012).

5 out of 14 million tonnes of microplastics in the ocean are from textiles (EEA, 2022).

Over 8% of the total global greenhouse gas emissions are produced by the apparel/footwear industry (Quantis, 2018)

ECONOMY

Fashion industry generates USD 1.3 trillion, employing 300 million people (McKinsey, 2019).

SOCIAL

India, Indonesia, Pakistan, the Philippines, Vietnam and Thailand receive less than minimum wages with rates varying from 6.6% to 53.3% (ILO, 2019)

#FastFashion | #UglyTruth1 | #UglyTruth2 | #UglyTruth3 | #UglyTruth4 | #ASEAN
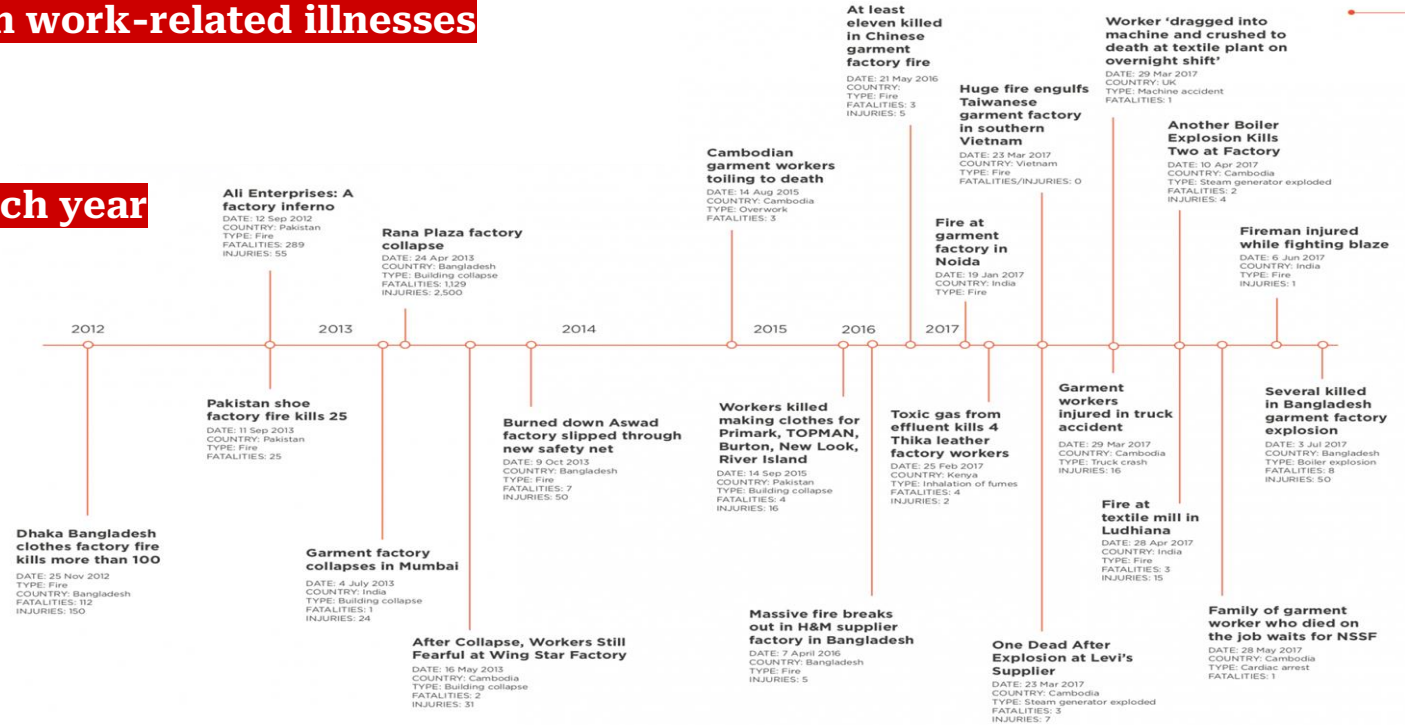
The "**TRUE COST**" of our "**CHEAP**" clothings

Timeline Poor health and safety in Garment & Textile industry from 2012 - 2017 (CO Data, 2018).

20 million people with work-related illnesses

1,600 deaths

1.4 million injuries each year

At least eleven killed in Chinese garment factory fire
DATE: 21 May 2016
COUNTRY:
TYPE: Fire
FATALITIES: 3
INJURIES: 5

Worker 'dragged into machine and crushed to death at textile plant on overnight shift'
DATE: 29 Mar 2017
COUNTRY: UK
TYPE: Machine accident
FATALITIES: 1

Huge fire engulfs Taiwanese garment factory in southern Vietnam
DATE: 23 Mar 2017
COUNTRY: Vietnam
TYPE: Fire
FATALITIES/INJURIES: 0

Another Boiler Explosion Kills Two at Factory
DATE: 10 Apr 2017
COUNTRY: Cambodia
TYPE: Steam generator exploded
FATALITIES: 2
INJURIES: 4

Cambodian garment workers toiling to death
DATE: 14 Aug 2015
COUNTRY: Cambodia
TYPE: Overwork
FATALITIES: 3

Ali Enterprises: A factory inferno
DATE: 12 Sep 2012
COUNTRY: Pakistan
TYPE: Fire
FATALITIES: 289
INJURIES: 55

Rana Plaza factory collapse
DATE: 24 Apr 2013
COUNTRY: Bangladesh
TYPE: Building collapse
FATALITIES: 1,129
INJURIES: 2,500

Fire at garment factory in Noida
DATE: 19 Jan 2017
COUNTRY: India
TYPE: Fire

Fireman injured while fighting blaze
DATE: 6 Jun 2017
COUNTRY: India
TYPE: Fire
INJURIES: 1

2012   2013   2014   2015   2016   2017

Pakistan shoe factory fire kills 25
DATE: 11 Sep 2013
COUNTRY: Pakistan
TYPE: Fire
FATALITIES: 25

Burned down Aswad factory slipped through new safety net
DATE: 9 Oct 2013
COUNTRY: Bangladesh
TYPE: Fire
FATALITIES: 7

Workers killed making clothes for Primark, TOPMAN, Burton, New Look, River Island
DATE: 14 Sep 2015
COUNTRY: Pakistan
TYPE: Building collapse
FATALITIES: 4
INJURIES: 50

Toxic gas from effluent kills 4 Thika leather factory workers
DATE: 25 Feb 2017
COUNTRY: Kenya
TYPE: Inhalation of fumes
FATALITIES: 4
INJURIES: 2

Garment workers injured in truck accident
DATE: 29 Mar 2017
COUNTRY: Cambodia
TYPE: Truck crash
INJURIES: 16

Several killed in Bangladesh garment factory explosion
DATE: 3 Jul 2017
COUNTRY: Bangladesh
TYPE: Boiler explosion
FATALITIES: 9
INJURIES: 50

Dhaka Bangladesh clothes factory fire kills more than 100
DATE: 25 Nov 2012
TYPE: Fire
COUNTRY: Bangladesh
FATALITIES: 112
INJURIES: 150

Garment factory collapses in Mumbai
DATE: 4 July 2013
COUNTRY: India
TYPE: Building collapse
FATALITIES: 1
INJURIES: 24

Fire at textile mill in Ludhiana
DATE: 28 Apr 2017
COUNTRY: India
TYPE: Fire
FATALITIES: 3
INJURIES: 15

After Collapse, Workers Still Fearful at Wing Star Factory
DATE: 16 May 2013
COUNTRY: Cambodia
TYPE: Building collapse
FATALITIES: 2
INJURIES: 31

Massive fire breaks out in H&M supplier factory in Bangladesh
DATE: 7 April 2016
COUNTRY: Bangladesh
TYPE: Fire
INJURIES: 5

One Dead After Explosion at Levi's Supplier
DATE: 23 Mar 2017
COUNTRY: Cambodia
TYPE: Steam generator exploded
INJURIES: 7

Family of garment worker who died on the job waits for NSSF
DATE: 28 May 2017
COUNTRY: Cambodia
TYPE: Cardiac arrest
FATALITIES: 1

#FastFashion   #UglyTruth1   #UglyTruth2   #UglyTruth3   #UglyTruth4   #ASEAN

Alarming accidents in Apparel Industry

Home | Queen Elizabeth II | War in Ukraine | Coronavirus | Climate | Video | World | Asia | UK | Business | Tech   ☰ More

Business | Market Data | New Economy | New Tech Economy | Companies | Entrepreneurship | Technology of Business | Global Education | Economy | CEO Secrets

The Collapse of Rana Plaza with a death toll of 1130 people lives and approximately 2400 people injured.

On 24 April 2013, one of the biggest hazard in garments industry occurred in Savar, Dhaka.

Fatal fires are common in Bangladesh's large garment manufacturing sector. Lax safety standards, poor wiring and overcrowding are blamed for causing several deadly factory fires every year.

"Had there been at least one emergency exit through outside the factory, the casualties would have been lower,"

Dhaka Bangladesh clothes factory fire kills more than 100

Nov 2012, BBC reports said that 120 people had died, with the number of fatalities to be at least 112. While hundreds are believed to be missing.

There are around 4,500 factories in Bangladesh, employing more than two million people. Clothes account for up to 80% Bangladesh's annual exports.

"Workers could not get out within safety time,"
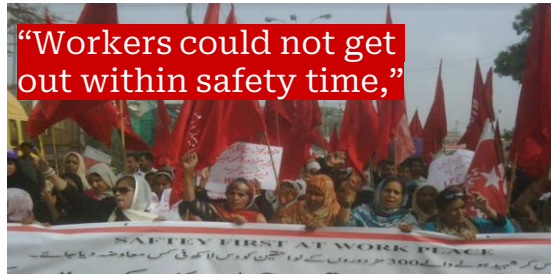
2021-2022: DEATH & INJURY IN GARMENT & TEXTILE INDUSTRY

Workers in many countries around the world are in dire need of safe factories. It is urgent that apparel and textile companies that have not yet signed the International Accord do so immediately to make factories safer in their supply chains and to support a swift expansion of the programme to high-risk countries.

Up to date in the timeline of 56 incidents since January 2021, 131 workers died and 279 were injured in garment and textile factories Pakistan, India, Egypt, Morocco, China, and Cambodia.

Trade unions and labor rights activists call for critically needed fire and building safety renovations and repairs in the textile and garment industry.

Production of textile fiber consumes *water, energy* and emit *CO_2*

Annual fabric production

- Hemp (0.09)
- Wool (1.2)
- Polyamide(6.1)
- Non-cotton cellulosics (7)
- Cotton (27)
- Polyester (54)

95.39 Million tons
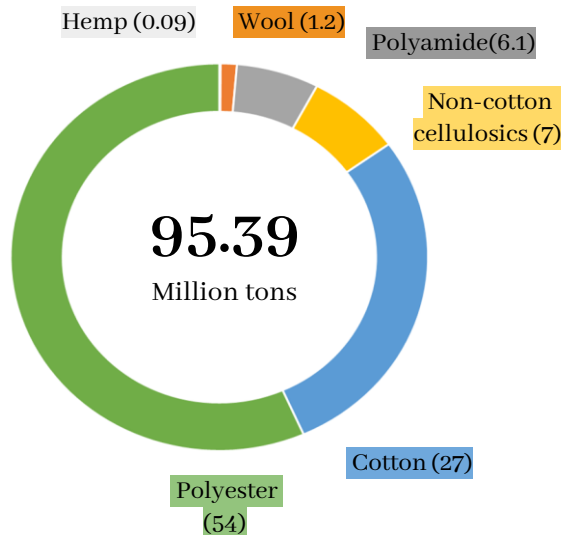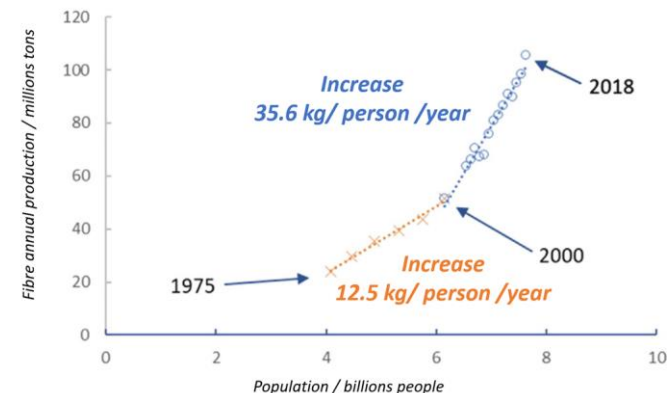
Source: (Niinimäki et al., 2020).

215 Billion liters of freshwater

11.361 Million GWh Energy

3.289 Giga tons CO_2 eq

Source: (Quantis et al., 2018).

The increasing trend of fabric production per capita

Increase 35.6 kg/ person /year — 2018

Increase 12.5 kg/ person /year — 1975 — 2000

Source: (Peters et al., 2021).

The worrying climate impact

2000 → 2015

1 → 1.3 Gt CO_2-e/year

Source: (Peters et al., 2021).

A large fraction of fashion products are.....

... made for nothing,

- Many brands have been accused of destroying their products (Eluxe, 2022).
- H&M leaves $4.3 billion in unsold inventory on the racks (New York Times, 2017)
- Burberry destroyed unwanted items worth £28.6m in 2017 (BBC, 2018).

... under used,

One in three women consider clothes old in <3× of wearing (Bernardo's, 2022).

One in every 8 **owned clothes** is "inactive" (Woodward, 2020).

... and end-up polluting the environment.

Polluting the **environment**

Life-time times of usage

World
EU
China
USA
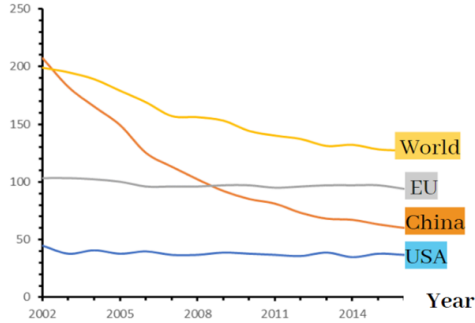
USAGE ↓

Source: (Assoune, 2022).

Enough to fill one and a half

Empire State Buildings

every day

A truck full of clothes either burnt or landfilled **every second**

Textile products in US (thousands tons)
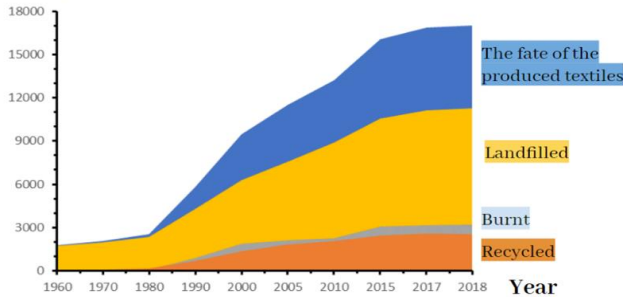
The fate of the produced textiles
Landfilled
Burnt
Recycled

DISPOSAL ↑

Source: (EPA.gov).

92 MILLION

tons of **waste clothes** is discarded annually

Source: (Earth.org).

ASEAN countries *share* consumption and production, and also *shoulder* the environmental burdens

Fashion industry growth in ASEAN over time

⚙ | ⁚ | ↗ Forecast

1M 3M 6M YTD 1Y All

Population search

654 668 685 767 1,030 1,080 1,169

2017 2018 2019 2020 2021 2022 2023

Year
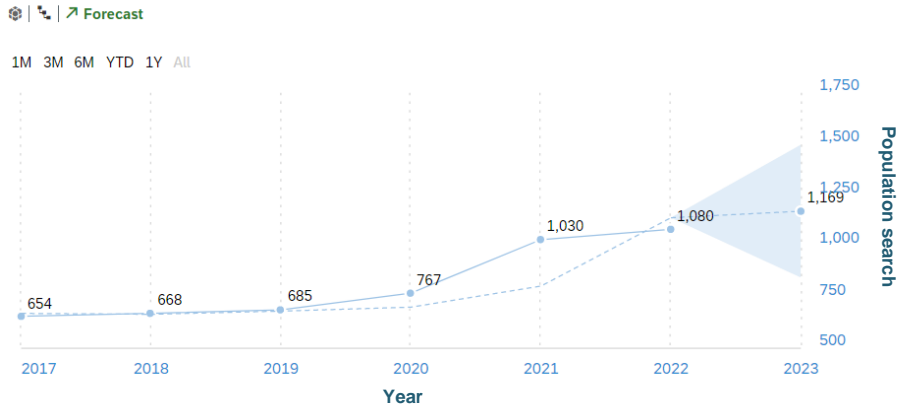
Source: (Google Trend).

Carbon emission per capita ASEAN over time

⚙ | ⁚ | ↗ Forecast

1M 3M 6M YTD 1Y All

CO2 per capita (tons per people)

41.39 42.00 41.90 41.92 42.23 40.33 41.26 42.15 42.14 43.86 43.84

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019

Year

Year

Carbon emission per capita (tons per capita) by ASEAN

⚙ | **Top 10 - All Dimensions**

Country	Value
Brunei Darussalam	149.83
Singapore	74.78
Malaysia	66.21
Thailand	33.42
Vietnam	18.24
Indonesia	17.35
Philippines	9.66
Cambodia	4.45
Myanmar	3.12
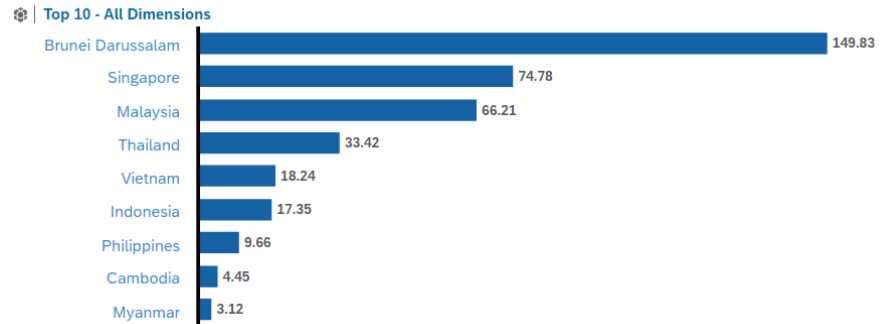
Source: (The World Bank Data).

#FastFashion	#UglyTruth1	#UglyTruth2	#UglyTruth3	#UglyTruth4	#ASEAN

Sustainable fashion **implementation** in ASEAN

Population search

	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam
■ Country	6435.45	717.24	2420.69	163.15	1139.41	2069.96
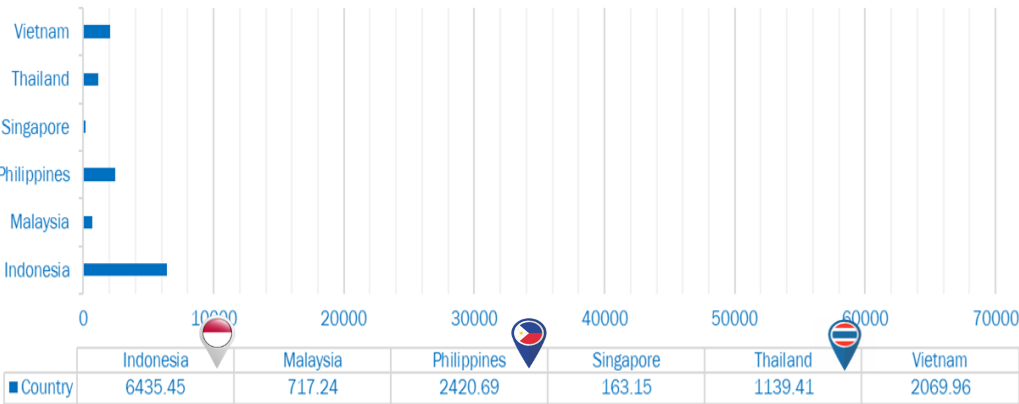
Source: (Google Trend).
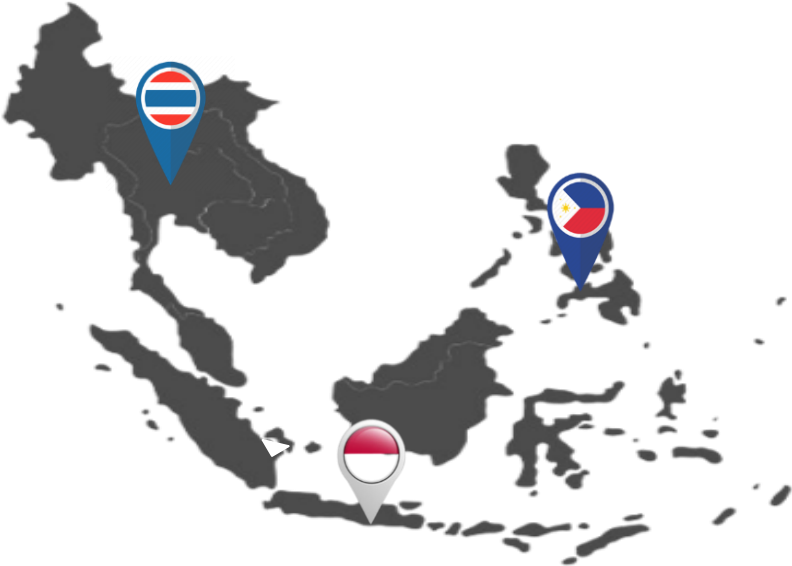
Indonesia

Fashion Chamber cultivate
circular fashion economies 2020 and
FairWear Foundation advocating for
labor rights, fair wages and equity

Philippines

The increase in production of fibers sources
from **pineapple**, **abaca** and **coconut** in
textile

Thailand

The **implementation** of local green design
by **artisan** and **weavers**

#FastFashion	#UglyTruth1	#UglyTruth2	#UglyTruth3	#UglyTruth4	#ASEAN

SDG target, ASCCBP and AECBP

TARGET 8·8
PROTECT LABOUR RIGHTS AND PROMOTE SAFE WORKING ENVIRONMENTS

TARGET 11·A
STRONG NATIONAL AND REGIONAL DEVELOPMENT PLANNING

TARGET 13·3
BUILD KNOWLEDGE AND CAPACITY TO MEET CLIMATE CHANGE

TARGET 12·4
RESPONSIBLE MANAGEMENT OF CHEMICALS AND WASTE

ASCC BLUEPRINT 2025

SECTION B.2	SECTION C.3
Equitable Access for All	Sustainable Climate

SECTION C.4	SECTION E.1
Sustainable Consumption and Production	Towards an Open and Adaptive Asean

AECBP BLUEPRINT 2025

SECTION B.8

Sustainable Economic Development

| SDG, ASCCBP, AECBP | Recommendation | Impact | Stakeholders | Market strategy | Milestone | Demo |

Introducing Pri₵e tag

Uses **data mining** and **image processing technology** to recognize the fabric materials and the clothing size.

Provides **customized estimation** according to user preferences.

What is Pri₵e tag?

Digital → Environment

User
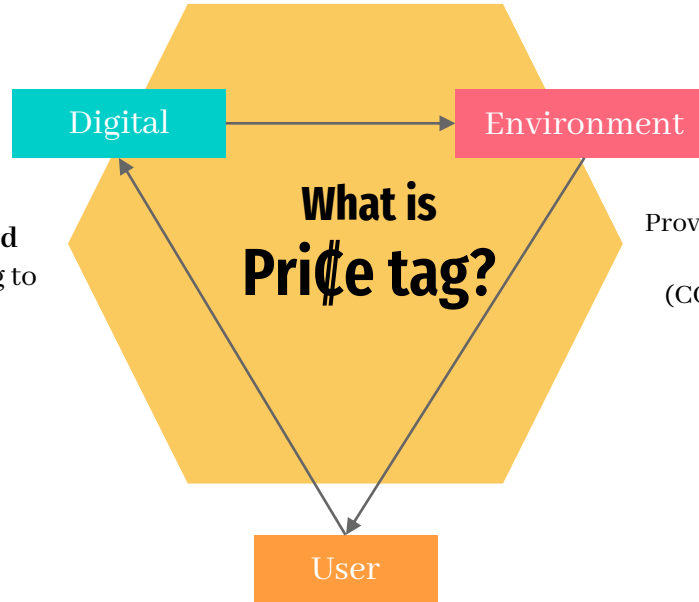
Provides **instant information** about the environment footprint (CO_2, water, energy, fabric waste and wastewater)

Embedded in a smartphone camera

Digital economy in ASEAN

ASEAN has a total of 440 million of internet users

+40M   +40M

360M
2019

400M
2020

440M
2021

2019   2020   2021

As more and more people use the internet to purchase common goods and services, the growth of e-commerce is at the centre of the regional digital economy's renewed expansion.

ASEAN consumer digital activities

% of internet users

Searched online for a product or service to buy | Visited an online retail store | Purchased a product or service online | Made an online purchase via a laptop or desktop computer | Made an online purchase via a mobile device

■ Indonesia   ■ Malaysia   ■ Philippines   ■ Singapore   ■ Thailand   ■ Vietnam

Internet penetration in ASEAN (%)

70%

10%

| Brunei | Singapore | Malaysia | Indonesia | Vietnam | Thailand | Philippines | Cambodia | Laos | Myanmar |
| 95.00% | 90.00% | 84.20% | 73.70% | 70.30% | 69.50% | 67.00% | 52.60% | 48.40% | 43.30% |

Speed network connection in megabits per second (Mbps)

Speed (Mbps)

Singapore | Vietnam | Malaysia | Cambodia | Thailand | Lao PDR | Philippines | Indonesia | Brunei | ASEAN Average | OECD Average

| SDG, ASCCBP, AECBP | Recommendation | Impact | Stakeholders | Market strategy | Milestone | Demo |
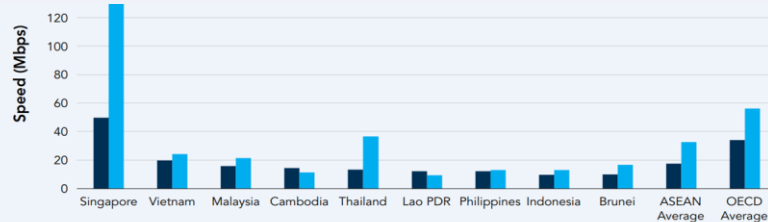
The Impact

The power of **negative** publicity on the consumer behaviour!

GHG emission and pathway to reduce it
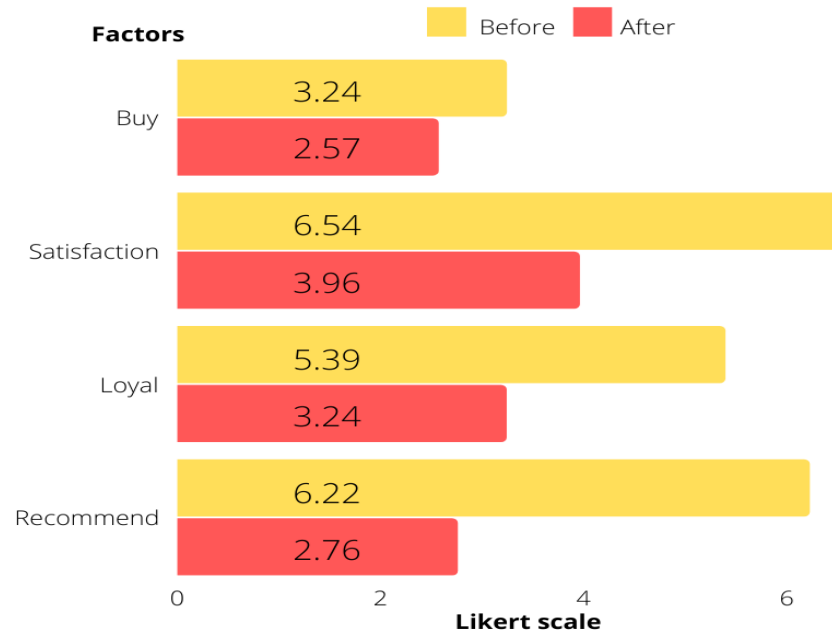
Source: (Roozen and Raedts, 2020).
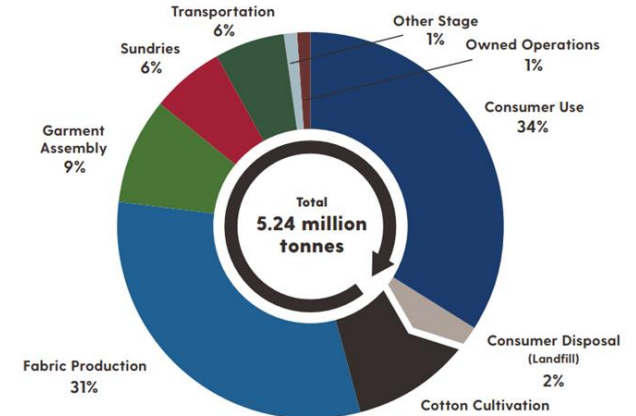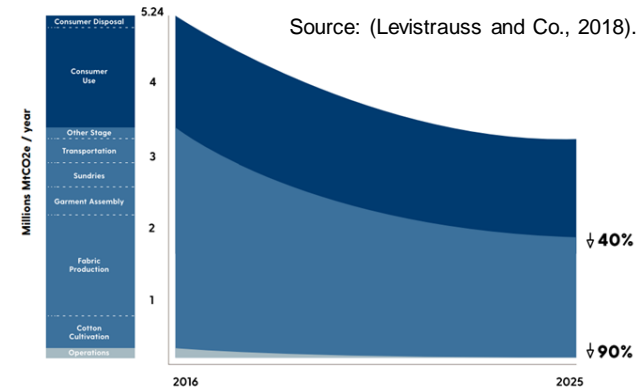
Source: (Levistrauss and Co., 2018).

Source: (Levistrauss and Co., 2018).

Stakeholder Support (in ASEAN)

Influence of stakeholders

Policymaker
✓ Support R&D
✓ Authorize the use of "sustainable fashion" term
✓ Develop standards for sustainable fashion
✓ Establish fashion education ecosystem
✓ Support fashion designer

Consumer
✓ Adhere to standards and regulations
✓ Cultivate awareness on the impacts of fast fashion.
✓ Support sustainability
✓ Develop self-reflection
✓ Sustainable consumption

Government & Institutional
✓ Implement tax on unsustainable clothing
✓ Encourage transparency
✓ Promote sustainable fashion education
✓ Increase accountability
✓ Create public awareness

ASEAN & NGOs
✓ Promote the creative fashion
✓ Increase awareness of sustainable fashion
✓ Impose control
✓ Fund sustainable initiative
✓ Collaborate with global institutions

Interests of stakeholders

| SDG, ASCCBP, AECBP | Recommendation | Impact | Stakeholders | Market strategy | Milestone | Demo |

Desired partnership/investor

QUALGRO

ALPHA JWC VENTURES

INSIGNIA VENTURES PARTNERS

BLOCK71 SINGAPORE
By NUS Enterprise
In partnership with Singtel Innov8

OPENSPACE

500 startups

& etc...

Financial Sustainability

Brand

Seller

User
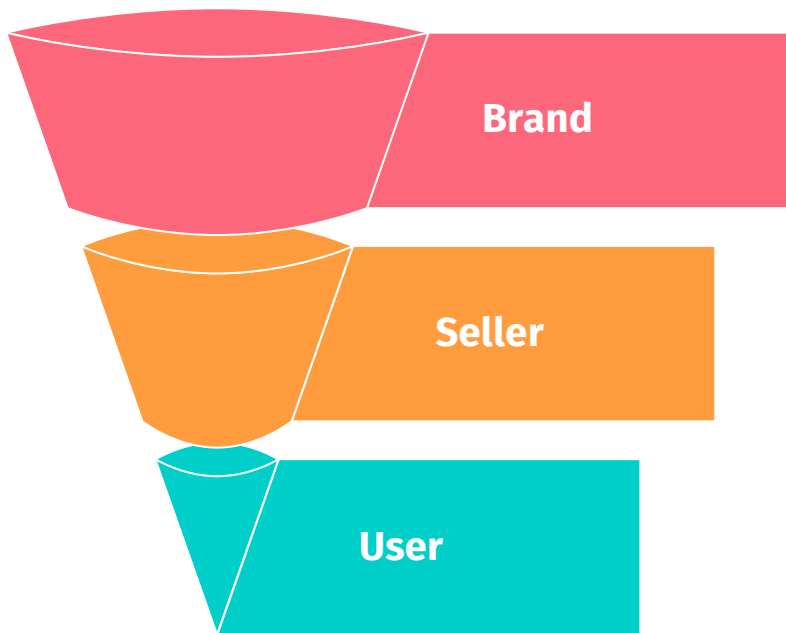
- Subscription of **USD 10k/year**
- To be **acknowledged** on sustainable fashion initiative
- Include product in Apps Database

- Seller will be charged **1 cent** per product to advertise

- **No charges** for the subscribers
- **No charges** for sustainable fashion designer

SDG, ASCCBP, AECBP	Recommendation	Impact	Stakeholders	Market strategy	Milestone	Demo

Market size

TAM
Global
4.5 Billion

SAM
Asia
1.2 Billion

SOM
ASEAN
440 Million

Phase 1
5%
of the target market
22 Million
user

SDG, ASCCBP, AECBP	Recommendation	Impact	Stakeholders	Market strategy	Milestone	Demo
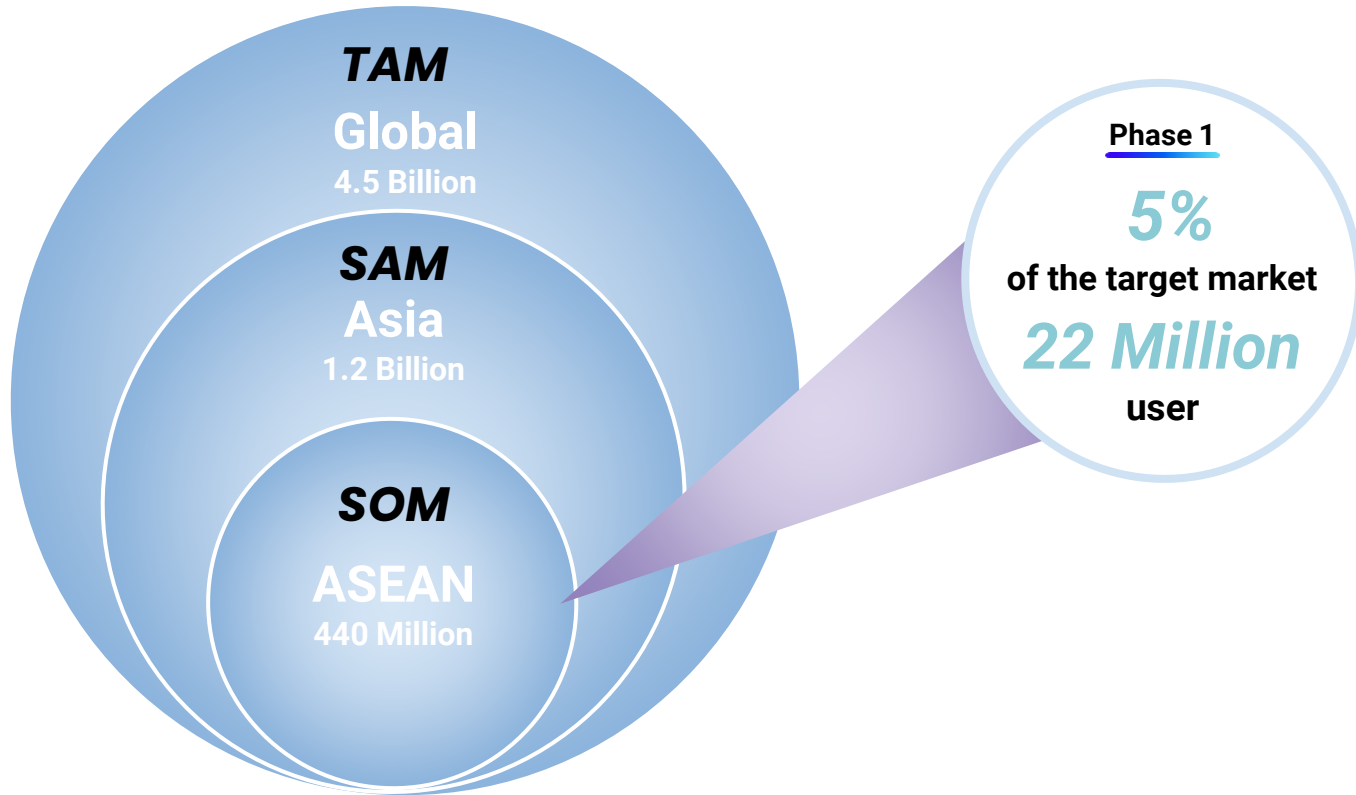
Estimated budget proposal

DIRECT COSTS per month

Cost type	Cost explanation	Amount
Team wages	2 team members, USD$ 25 per hour	$1 000
App development	Hire programmer to develop app	$400
Paid ads	Marketing app to social media platform	$300

INDIRECT COSTS per month

Cost type	Cost explanation	Amount
Utilities	Utilities used for project progression, internet and electricity	$190
Server costs	Server for storing customer's data	$100
	Annual total costs	$23 880

Milestone
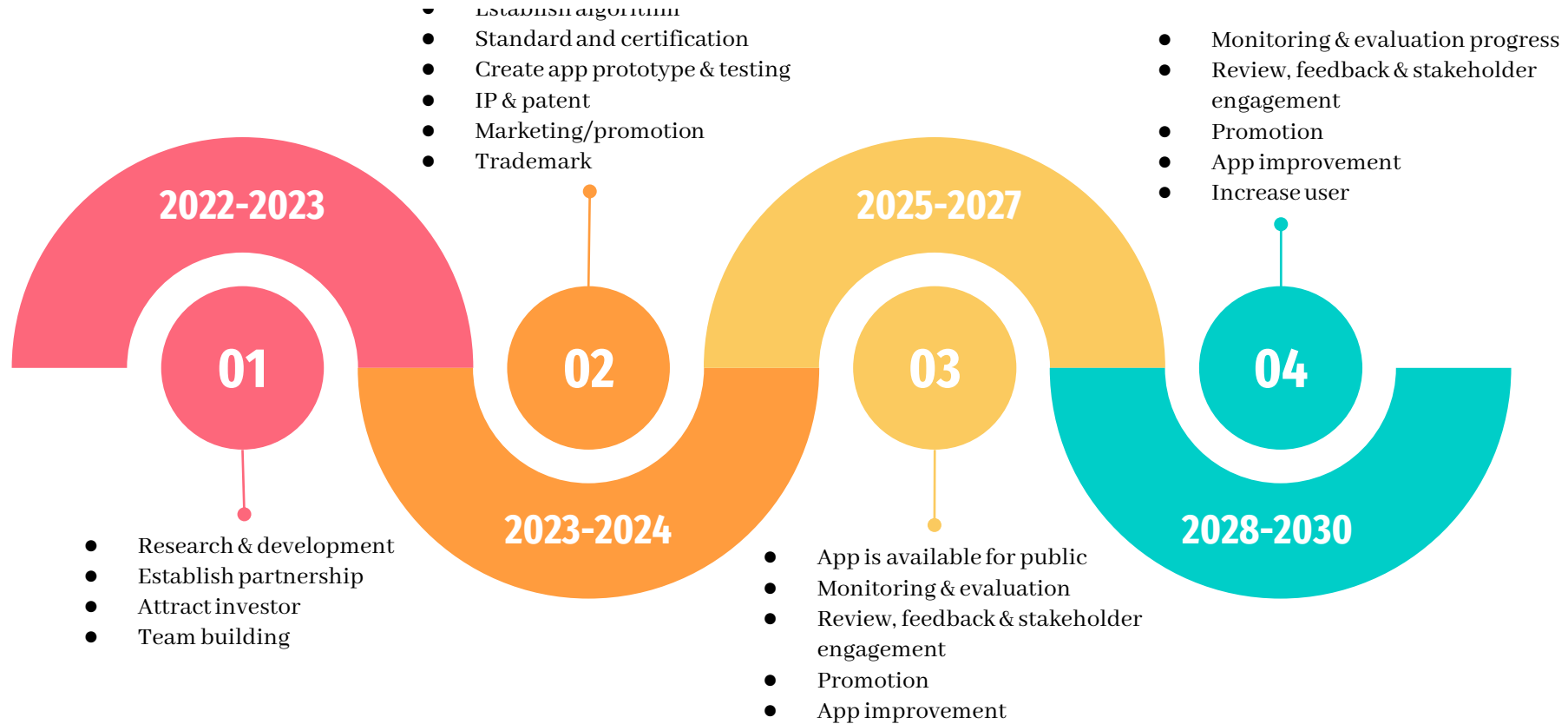
2022-2023

- Establish algorithm
- Standard and certification
- Create app prototype & testing
- IP & patent
- Marketing/promotion
- Trademark

01

- Research & development
- Establish partnership
- Attract investor
- Team building

02

2023-2024

03

2025-2027

- Monitoring & evaluation progress
- Review, feedback & stakeholder engagement
- Promotion
- App improvement
- Increase user

04

2028-2030

- App is available for public
- Monitoring & evaluation
- Review, feedback & stakeholder engagement
- Promotion
- App improvement
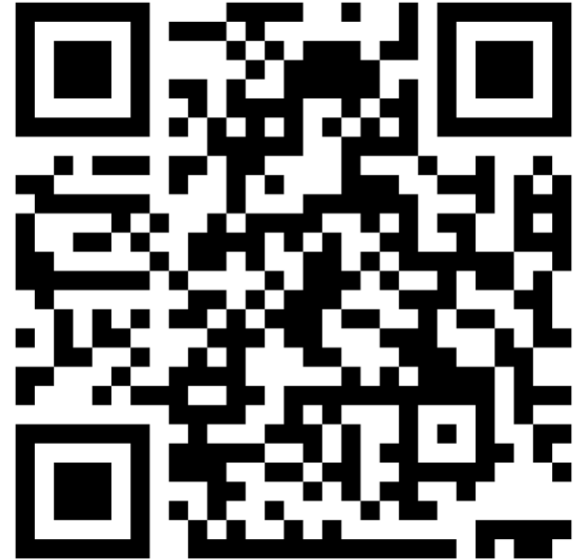
| SDG, ASCCBP, AECBP | Recommendation | Impact | Stakeholders | Market strategy | Milestone | Demo |

DEMO

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Energy consumption per capita (kJ/capita) ASEAN over time

↗ Forecast

1M 3M 6M YTD 1Y All

6,770.84
6,487.74
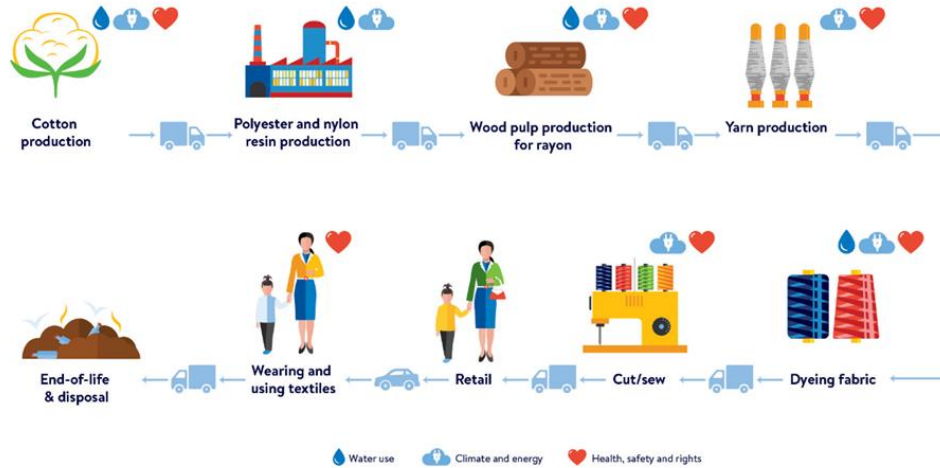6,670.44
6,370.03
5,468.11
4,442.96

1990 1995 2000 2005 2010 2015 2020
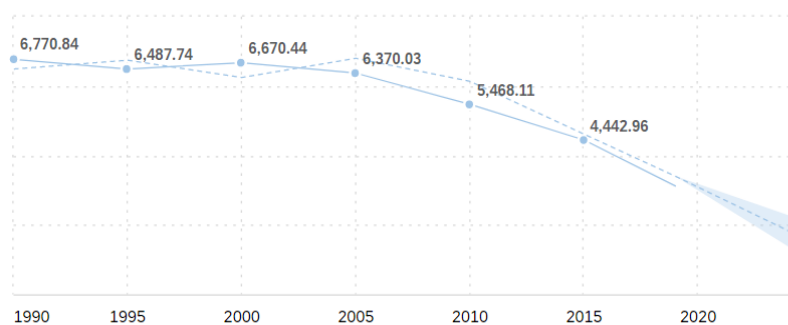
Source: (The World Bank).

Energy consumption per capita (kJ/capita) by ASEAN

Top 10 - All Dimensions

Brunei	39,049.73
Myanmar	58.68
Thailand	41.41
Vietnam	40.53
Cambodia	38.33
Singapore	36.78
Philippines	36.54
Malaysia	26.97

8,000
6,000
4,000
2,000
0

Source: (The World Bank).

Case study: LIFE CYCLE of FASHION INDUSTRY

Source: (Neto et al., 2020)
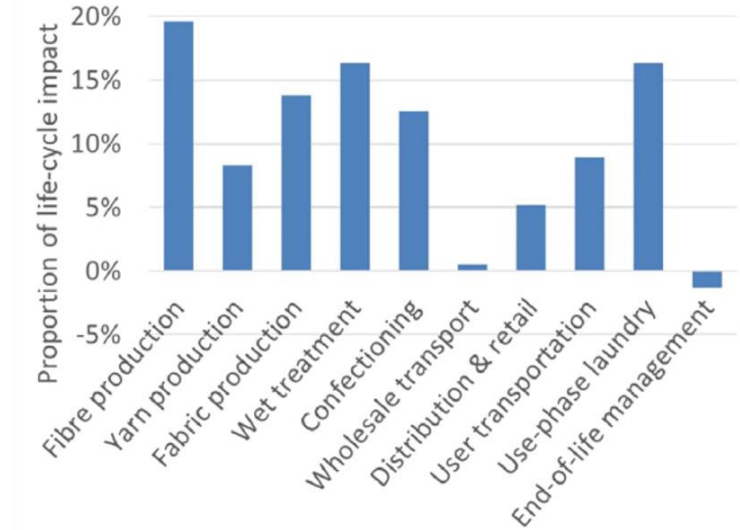
Source: (Sandin et al., 2019).

Case study: LIFE CYCLE of FASHION INDUSTRY

	Stage	
Cotton must be grown, harvested & processed	**Fibre production**	Pesticides lead to health problems for workers + soil degradation
Machinery processing to make fabric	**Textile production**	Health impacts in the air affecting respiratory system
Fabric dyeing & treated with heat & chemicals	**Wet and drying**	Use of chemicals dyes + discharge untreated
Finished products are transported & enter markets	**Commercial**	Emission released with high energy consumption
Detergent + fabric softeners in washing machine	**User**	Dyes + chemicals are released in water system and consume high energy
Clothes takes long years to degrade to landfills	**End of life**	Emission release and chemicals during disposal (dumping or incineration)

Appendix 3

T-shirt emissions:
- 2.6 [KG]
- 12 [M3]
- 54 [MJ]

% of CO₂ production (T-shirt):
- Cotton production: 8%
- Yarn production: 19%
- Garment production: 50%
- Distribution and retailing: 4%
- User phase: 19%

% of CO₂ production (Jeans):
- Cotton production: 9%
- Yarn production: 10%
- Garment production: 57%
- Distribution and retailing: 4%
- User phase: 20%
- End of life: 0.1%

Jeans emissions:
- 11.5 [KG]
- 55 [M3]
- 247 [MJ]

Appendix 4

Source: (Niinimäki et al., 2020).

Additional:

USER

Largely driven by the 'fast fashion' phenomenon (cheap price, high demand with fast production) the growing consumption of clothing doubled over the past 15 years – yet the lifetime of clothing used has been in steady decline.

Calculating emissions from the use phase is challenging, as there is a lack of data on behaviours such as the frequency of washing, washing temperature, detergent types and drying methods, which vary greatly between cultures (Yasin et al. 2016). The use phase would include data on the garment lifetime, use frequency, washing habits, and the energy, water and materials used in washing, drying and ironing.

The UK brand Marks & Spencer (M&S) found that the use phase had the largest consumption of energy across the life cycle, responsible for 81 % , major consumption of energy is washing and drying.

END-OF-LIFE

By 2030, we are expected as a whole to be discarding more than 134 million tonnes of textiles a year. Over 14 million tonnes of microplastics have accumulated on the world's ocean floor, up to 5 million tonnes are from textiles (EEA). The majority of microplastics from textiles are released the first few times textiles are washed, mainly in the textile wastewater.

Business Model Canvas

Key Partners

- Fashion designer brand

- Sustainable fashion designer

- Website/application developer

- Policy maker & government

- Potential investor

- User

Activities

- Software development

- Partnership with **key partners**

- To provide a transparent data

Resources

- Application & web application

- Patent & IP

- Funds & cloud data storage capability

Values

- Increased awareness of the fast-fashion industry and its environmental impacts

- To promote sustainable fashion designer products across ASEAN

- To ensure the sustainable fashion clothing line is not greenwashed by the fashion brand

- To provide a transparency data platform

Relationships

- Maintain an ethical and transparent connection with **key partners**

- Ensure that feedback from **key partners** is tracked throughout the implementation

Channels

- B2C: Application platform for user to purchase sustainable clothing line

- B2B: Application platform for sustainable fashion designer and fashion brand to acknowledge on sustainable fashion initiative

Customers

- Fashion branding that acknowledges and supports sustainable fashion

- Sustainable fashion designer who aims to sell products to buyers (Pricetag is a one stop platform)

- User who supports sustainable fashion and increase awareness about the impacts of the fast-fashion industry

Costs

- Website/application development
- Server maintenance
- Customer acquisition costs (Fashion designer & fashion brand, user)
- Employees

Revenue Stream

- Each product sales (USD 0.01)

- Branding subscription (USD 10k/annum)

Our competitors

Features	Price Tag	Buycott	Good on you
Data image processing on the products	✓	✓	✗
Support sustainable products	✓	✗	✓
Provide the true cost per unit of cheap clothing	✓	✗	✗
Application is free to download	✓	✗	✓