

Sustainable revolution

FROM NATURE TO FASHION



naia™
FROM NATURE TO FASHION

Sustainable revolution



**Research
review**



**Sustainable
divide**



**Materials
matter**



**True
transparency**



Naia™ solution

Research review



Markets

U.S. | China | UK |
Germany | Italy

Sample

5,600 men and women |
ages 13-60

Method

Mixed method | U.S.
research community



Sustainability divide

Sustainability divide



Impact of the global fashion industry

10%

of GHG emissions come from the fashion industry.

36%

decrease in the number of times a garment is worn

60%

growth in apparel consumption by 2030

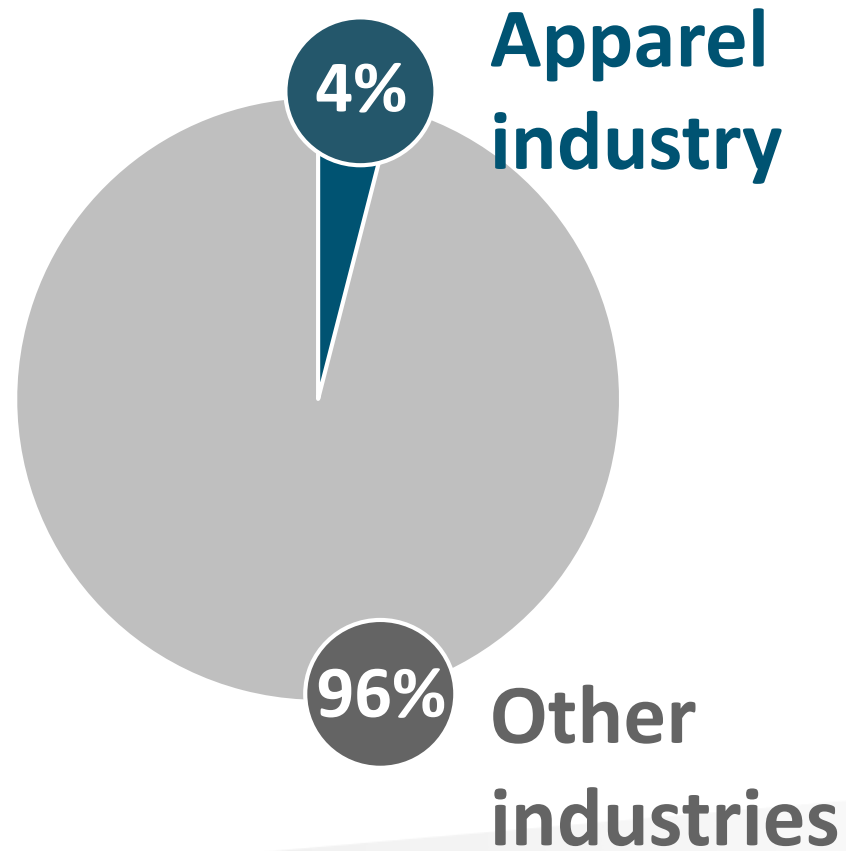
87%

of textiles are landfilled or incinerated.

Sustainability divide

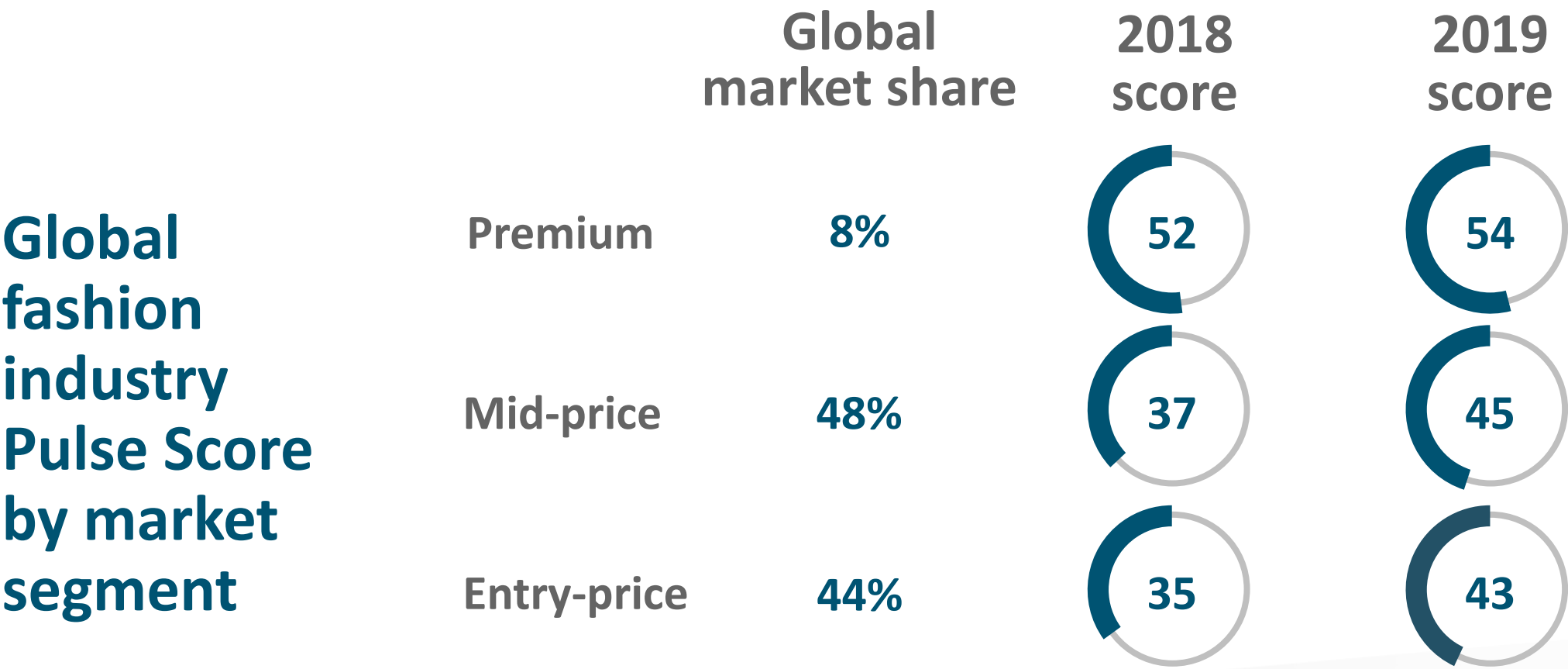


**Apparel's share
of the top 100
most sustainable
global brands**



- 1** Kering
- 2** H&M
- 3** adidas
- 4** Inditex

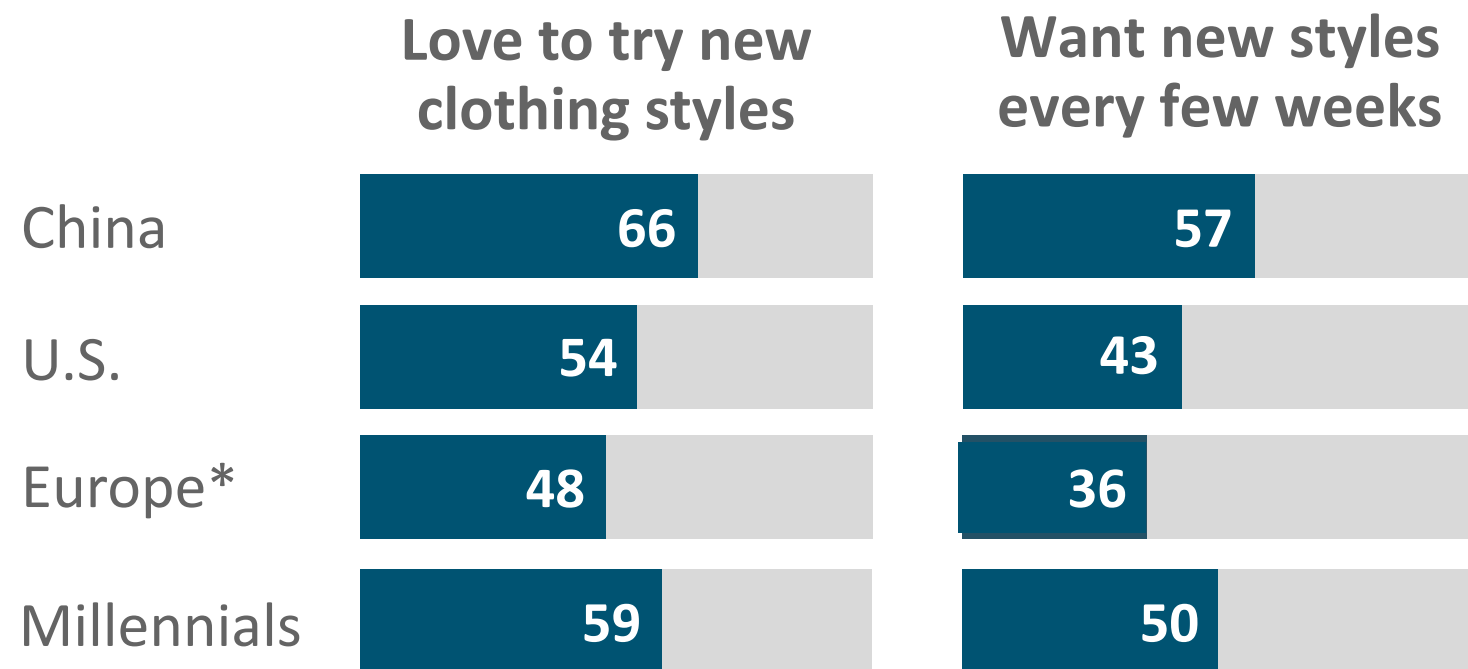
Sustainability divide



Sustainability divide



**Percentage of
consumers
saying they ...**



Sustainability divide



Factors very
important in
global
consumers'
apparel
purchases



Primary

Fit | comfort | quality |
price | style | durability



Secondary

Color | soft | no irritation |
breathability | care |
performance



Other

Fiber content |
sustainability | origin

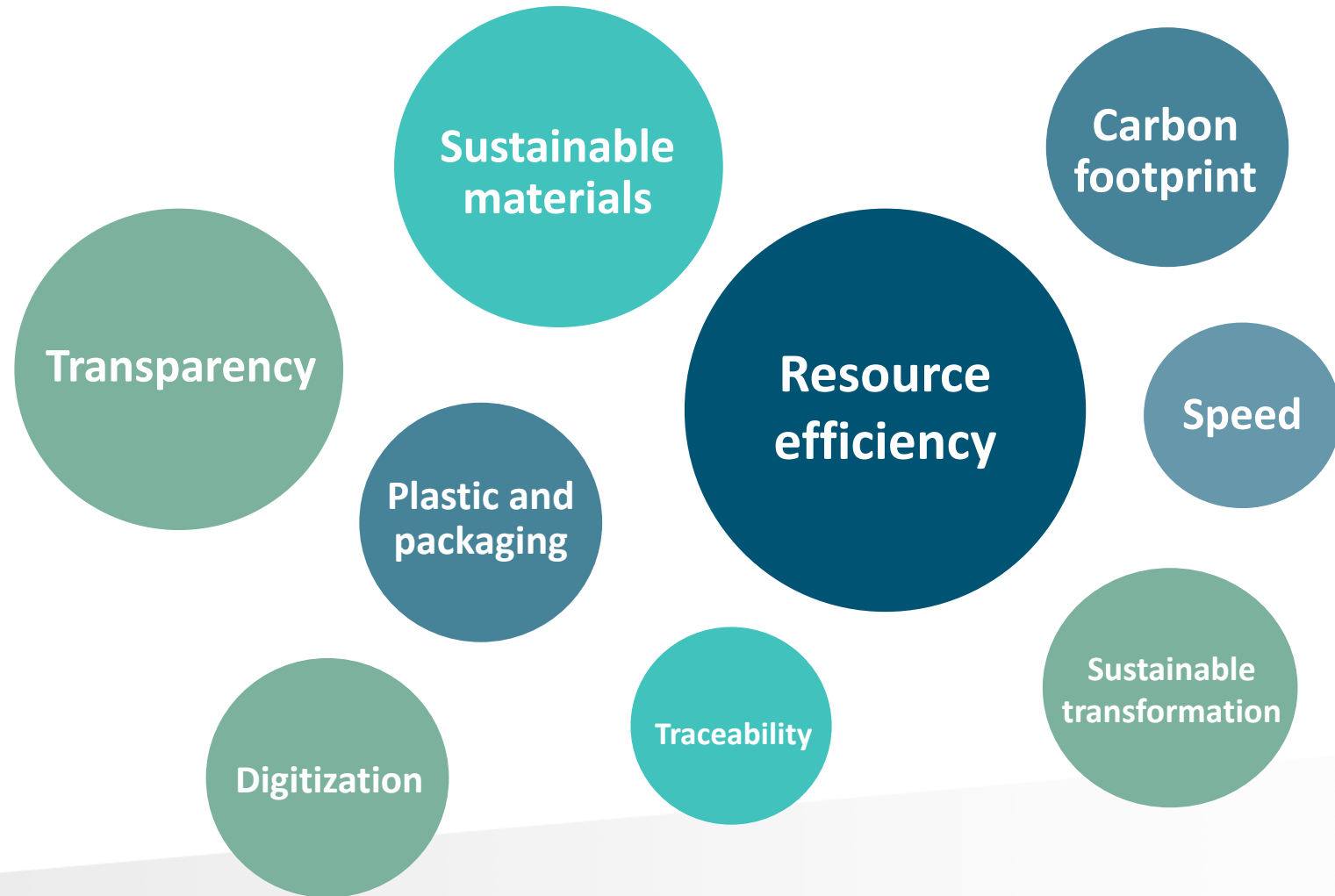
Materials matter



Materials matter



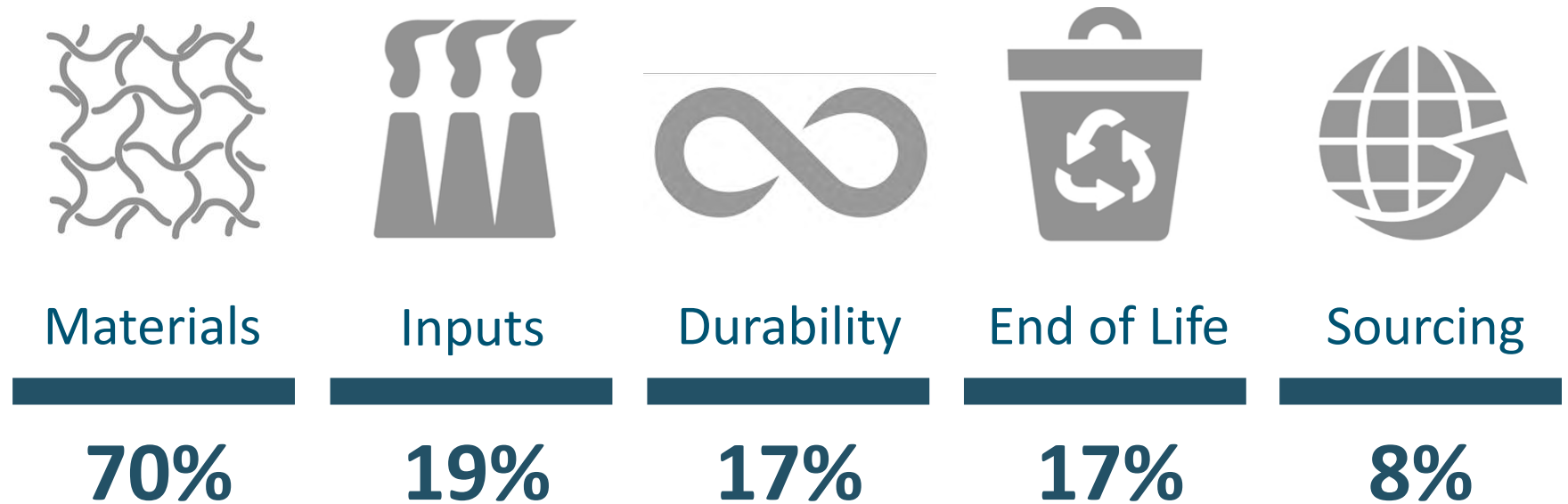
**Important
sustainability
issues to
global brands**



Materials matter



Sustainably-minded U.S. consumers' opinions on what makes a garment sustainable



Materials matter



**Demand
(MMT 2018)**



**Growth
2013-18**



**Market
share**



**Preferred
share**

Synthetics	66.6	+12%	62%	13%
Cotton	26.7	+13%	24%	22%
Cellulosics	6.7	+40%	6%	21%
Other naturals	1.3	-2%	1%	n/a

Materials matter



Microfibers
88%

Increase of microfibers in
the ocean

Deforestation
85%

Deforestation during
production of rayon

Sustainable fiber
84%

Lack of sustainable
fibers in garments

Cotton
83%

Water, pesticides, and land
used to grow cotton

Polyester
80%

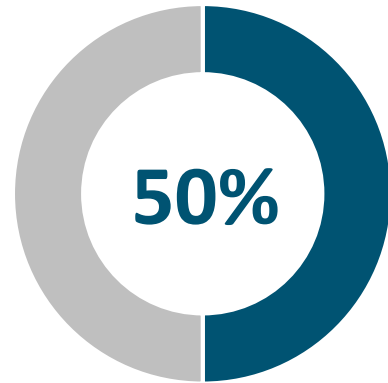
Increasing use of
polyester for clothes

**Sustainably-minded
U.S. consumers say
they are concerned
with these issues**

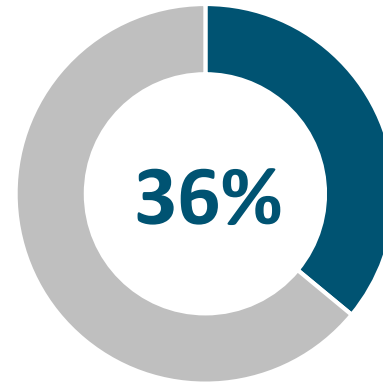
Materials matter



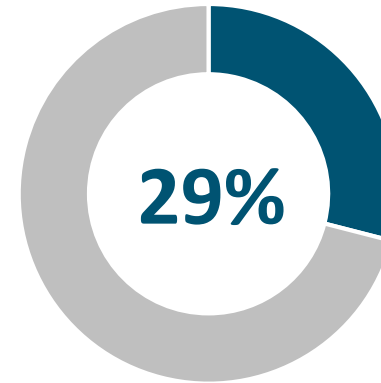
Top 20 global
fashion brand
sustainable
material
commitments



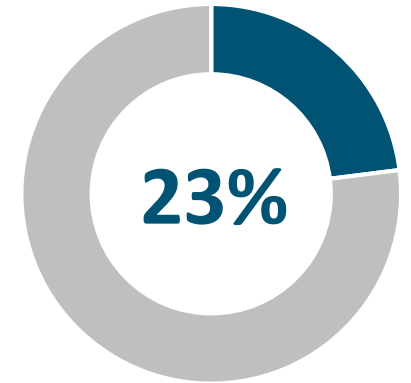
**Better Cotton
Initiative**



**Canopy
Planet**



**Make Fashion
Circular**

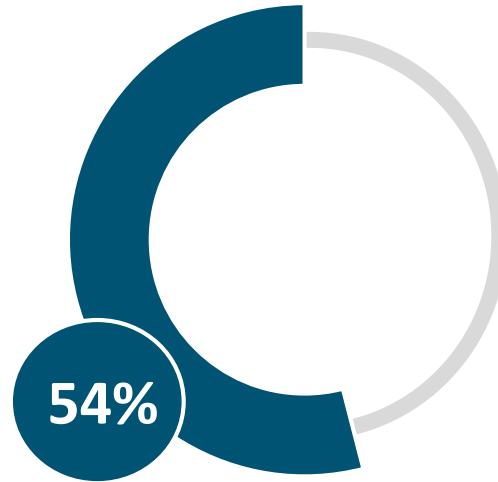


**Recycled Polyester
Commitment**

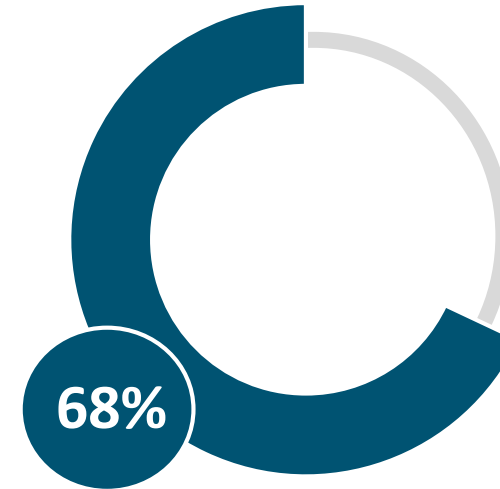
Materials matter



Likelihood that the following industry-wide sustainability disruptions will occur by 2025



Biobased textiles
Replace 20% of current textiles



Recycled fibers
30% or greater in every new garment

Materials matter



Fiber commitments among Naia™ brand partners

- ▶ **H&M**
Drive transparency | 100% circular and climate positive
- ▶ **Derek Lam**
Incorporating sustainable materials
- ▶ **LLP**
50% of garments in Eco Aware made of sustainable materials by 2025
- ▶ **Stella McCartney**
Drive transparency | support sustainably managed forestry materials
- ▶ **Marks and Spencer**
80% of raw material usage will be sustainably sourced by 2025

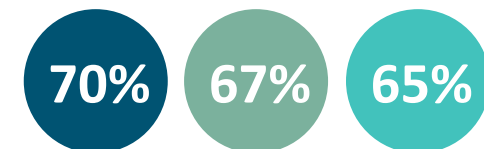
Materials matter



Always read fiber
content labels



Avoid fibers harmful to
the environment



Willing to try new and
different fibers



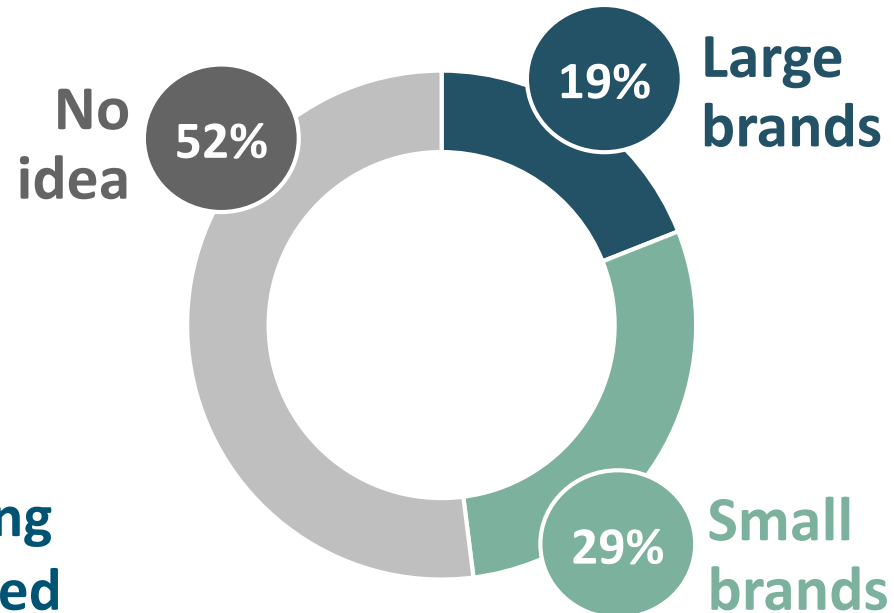


**True
transparency**

True transparency



"I tend to trust small brands. Large corporations tend to greenwash in an attempt to capitalize on the popularity of sustainable products."



Type of brand viewed as most trustworthy among sustainably-minded U.S. consumers

"I trust brands that actually list the ingredients so that I can make informed decisions about my purchase. Ones I trust least are those that provide zero information."

"I trust brands with a strong history of doing the right thing because they have proven their commitment to society."

True transparency



Sources for clothing inspiration among global consumers



Current wardrobe
57%



Retail stores
65%



Word of mouth
55%



Social media
42%



Brand websites
35%



Magazines
32%



TV
29%

True transparency



Likelihood that the following industry-wide sustainability disruptions will occur by 2025



Radical transparency

Greater than 50% of brands will achieve radical transparency.



Supplier relationships

Co-investing with suppliers will be the norm for fashion brands.



In-store education

Information on *fiber-to-store* will be seen at the majority of POSs.

True transparency



Key takeaways



- Although the global fashion industry is stepping up to reduce its impact on the environment, bringing consumers along on the journey is a challenge.
- Consumers define apparel sustainability through materials—making material selection the cornerstone of brand sustainability strategies.
- Opportunities exist to collaborate with suppliers to build transparency throughout the supply chain and better educate consumers.
- Naia™ offers a sustainable material without compromise, helping brands bridge the gap between their sustainability commitments and consumer needs.