Fashion Futures 2025: global scenarios for a sustainable fashion industry

LEVI STRAUSS & CO.
why futures?

- Strengthens long-term strategic planning
- Stimulates product, service and system innovation
- Better prepares organizations for emerging trends
- Helps build future visions - powerful illustrations of overarching goals and sustainable solutions
- Drives organizational change and inspires new ideas through dialogue and convening
why scenarios?

To support:
• Communication of sustainability issues
• Strategy development
• Product, service and process innovation

See our website for useful workshop materials:
www.forumforthefuture.org/projects/fashion-workshop-materials
about fashion futures

- Joint project between Levi Strauss & Co and Forum for the Future
- In consultation with over 40 experts, we constructed four plausible, stretching scenarios for what the global fashion industry could look like in 2025
- Began in October 2008 and launched at London Fashion Week in Feb 2010
  - an engaging online report and printed executive summary
  - four short animations that represent the scenarios
  - workshop materials: exercises, presentation, agenda
objectives of the project

• To communicate a well-researched, lively and engaging series of scenarios and recommendations
• To promote a more sustainable future for the global fashion industry
• To stimulate a debate about the future for global fashion and inspire a more sustainable response to it
fashion futures 2025

global scenarios for a sustainable fashion industry
Some certainties we can expect…

| Impacts of climate change | Severe and unpredictable weather  
|                          | Shifting rainfall patterns  
|                          | Global target: cut CO₂ 50% by 2050  
| Resource costs & shortages | 2025: 1.8 billion people living with water scarcity; food, building materials, energy, cotton: oil @ $130 in 2030  
| Demographic change | 1.3 billion more people by mid-2020s  
|                        | Ageing population in developed world |
...some factors we are less certain about

- How will society respond to resource scarcity and climate change?
- How might legislation shape the fashion industry?
- How much disposable income will we have, and what will we spend it on?
- How will the so-called ‘emerging economies’ develop?
- Technological advancement
- Consumer acceptance of sustainable consumption
- How might demographic changes affect the clothing industry?
two areas of high importance and uncertainty

1. How connected is the world?

*Connected* where economic globalisation has expanded further, trade barriers have lowered, communications are more united and global cultures are more similar.

*Fragmented* where globalisation has gone into reverse, there is more protectionism, long distance trade is declining and regional identities are stronger.
two areas of high importance and uncertainty

2. How fast do society and its fashions change?

Fast where speed of change has accelerated: in media and communications; in flows of financial capital; and in how people express themselves through culture and fashion.

Slow where the rate of consumption has reversed; flows of financial capital are slower; and cultures change more gradually.
Political collaboration and global trade in a world where slow and sustainable is fashionable.
Resource crises constrain consumption in a local community focused world.
High tech systems deliver for a speed-obsessed global shopper

Techno-Chic
Fast consumption in global cultural blocs

Patchwork Planet
Fast consumption in global cultural blocs

Resource crises constrain consumption in a local community focused world

Political collaboration and global trade in a world where slow and sustainable is fashionable

High tech systems deliver for a speed-obsessed global shopper

Slow is Beautiful

Techno-Chic

Community Couture

Patchwork Planet

Fashion Futures Scenario Axis
CAUTION!
TREAT SCENARIOS WITH CARE

- Not predictions, but images of possible futures, tools to imagine what world could look like
- Stimulate new ideas - challenges and opportunities
- Test strategies for robustness
Collaboration in a world where slow and sustainable is fashionable

- This is a moralistic world of low-carbon, sustainable lifestyles
- Strict carbon regulation and sophisticated tracking and labelling mean consumers are more aware of all impacts
- The majority of consumers are willing to pay more for a smaller number of high-quality, sustainable clothing items.
- Fashion styles are gradually becoming more homogenised and reflect a ‘safe’, less innovative world.
- The fashion industry has worked hard to decarbonise, and shift people’s perceptions of the industry – post 20thC consumption
- Although ‘living wages’ are now the norm for factory workers, a ‘grey economy’ of cheaper fashion with poor working conditions still exists.
Materials:
- Natural resources very expensive
- Major growth in sustainable cotton
- Renewable, durable recycled fibres

End of Life:
- Disposal tightly regulated - including personal landfill quotas
- Peer to peer clothes swapping networks
- Widespread re-manufacturing

External Context:
- Low-carbon, low-reserve economy
- Global agreement on climate change
- Draconian regulation
- Awareness and desirability of sustainability is extremely high
- Slow technological development, innovation is stifled

Production:
- Hyper-efficient logistics
- Regional hubs with extreme specialisms
- Handcrafting
- Improved working conditions - including living wages

Use:
- Durability is desirable
- Chemical-free cleaning services, wash far less, wash cold
- Upgrading services for clothing

Retail:
- Sustainability central to buying decisions
- Radical transparency and consumers well informed
- Widespread digital tagging
- Localised shopping facilities
High tech systems deliver for a speed-obsessed global shopper

- This is a prosperous world which has benefitted from an early switch to a low-carbon economy and huge technological investment.
- Smart consumers are flourishing in this high-tech, open world of few trade barriers and fast-paced fashion fads.
- Man-made fabrics rule the fashion markets, providing personalised, high-tech, affordable options across the globe.
- Massive levels of automation and sharp declines in the use of labour create pockets of crippling unemployment across economies previously reliant on clothing manufacture and production.
Materials:
> Few materials are used to make clothing
> All new materials are extremely expensive, including cotton and polyester
> Unwanted clothing is a valuable commodity

External context:
> Huge resource constraints splinter the world - natural resources are scarce and very expensive
> World not coping well with impacts of climate change
> Closed, protectionist world
> Security of food and energy supply is a top priority

Production:
> Clothing manufacture is very expensive
> Cost pressure and lack of accountability results in poor working conditions
> Home and community production of clothing

End of life:
> Nothing is disposed of – it is too valuable
> Door to door collections of clothing
> Community recycling centres linked to local factories
> Thriving black market for clothes

Use:
> Customising, tailoring and repairing are all popular
> Community laundries
> Add one cup of water to washing machines

Retail:
> 'Traditional' retail in decline, 2nd hand retail booming
> Clothing cooperatives are on the rise
> Leasing via clothing libraries is popular
Self-sufficient communities thrive in a world struggling to cope with the strain of **growing populations and resource shortages**.

- **Very high costs of raw materials** and disrupted supply chains have resulted in a dramatic fall in the production and sale of new clothing.

- In its place **vibrant local networks of second-hand clothing** have evolved: community bonds are strong and creative fashion solutions abound.

- That said, many consumers still strongly **desire ‘new’ clothes** – now affordable only to the rich or on the black market.
End of life:
- Sophisticated waste systems
- Closed loop manufacturing
- Design for disassembly and re-use

External context:
- Healthier, wealthier world
- Early switch to a low-carbon economy
- Climate change adaptation technologies shared globally
- Open markets with few trade barriers
- Heavy investments in R&D

Production:
- China & India lead
- High level of automation
- Rapid, interactive and personalised production
- Forecasting and crowd-sourcing

Use:
- Garments have short lifecycle
- Fades last hours/days
- Reduced home washing
- Perspiration control built in to clothing

Retail:
- 24/7
- Fast & furious (hours not seasons)
- High consumerism
- Global brands rule supreme online

Materials:
- Smart, nano-tech fibres and materials
- Non-toxic, spray-on fibres
- Cotton and non-renewable synthetics almost entirely replaced with above materials
Fast consumption in global cultural blocs

- **Years of conflict**, exacerbated by **uneven economic recovery** from recession and a shortage of strategic resources.
- **Global community fragmented**, with deep suspicion between cultural blocs.
- A world of **rapidly changing fashions** – where styles are led by an economically and culturally **powerful Asia**.
- **Supply chains regionalise** to meet consumer demand for fast-changing, regional, patriotic fashion.
- The world is **struggling to cope** with mounting social tensions and environmental constraints.
- Many wonder how long this pace can last.
Materials:
> Resource hoarding and regional variations in materials
> Dramatically decreased cotton production
> Grow-your-own clothing popular

End of life:
> Waste is still a global issue, with no responsible system in place
> Illegal dumping of industry waste continues to exist

External context:
> Fast-paced but fragmented world
> High growth and consumption in Asia
> Slow growth and consumption in the West
> High barriers to trade (tariffs and quotas)
> Countries and companies go to extremes to guard IP

Production:
> Regionalised production lines
> Rapid time to market
> Transportation is expensive
> Waterless textile dying

Use:
> Personalised clothing is desirable
> Clothing with reduced need for washing and ironing is popular
> Updating and renewing clothing is a major trend

Retail:
> Brands tailor to culture-specific trends
> Have strong local presence and identity
> Geared towards ‘fashion services’
> Backlash against ‘American’ fashion
How to use the *Fashion Futures* scenarios

**Use the scenarios to:**
- future-proof your current business models and processes
- develop new strategies
- help form your own vision of the future
- stimulate partnership working
- to innovate
- enable team and personal development
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For more information

visit
www.forumforthefuture.org/projects/fashion-futures

contact us
Vicky Murray | v.murray@forumforthefuture.org
Fiona Bennie | f.bennie@forumforthefuture.org