

# Contents

## SECTION 1

### Retail Landscape ..... 20

#### 1.1 OVERVIEW ..... 22

Indian Fashion Retail Market- 2022

by Amit Gugnani & Tanishka Tandon, Technopak Advisors

#### 1.2 THE BIG PICTURE ..... 34

Nothing is Impossible: Transformative Practices in the Fashion Retail Industry

by Abhishek Sharma Co-Founder & COO, Fashinza

#### 1.3 SUSTAINABILITY PROGRAM ..... 40

Helping Address Fashion's Environmental Impact at The Farm-Level Through Verified Sustainability Data

by Bruce Atherley, Cotton Council International

#### 1.4 COMPARISON ..... 44

Art & The Science of Sustainability

by Swaroop V & Satish B R

#### 1.5 THE ROAD AHEAD ..... 50

Environmental Impact of the Fashion Industry & the Path to Sustainability

by Karun Tyagi, Proklean



### Sustainability Initiatives

Abercrombie & Fitch .....	56
Bestseller .....	60
H&M .....	64
Levis .....	70
Nike .....	74
Patagonia .....	78
Puma .....	80
Ralph Lauren .....	82
Reformation .....	86
Under Armour .....	88
Uniqlo .....	90
Welspun .....	92
Wrangler .....	94

# Contents

## SECTION 2

### Trends: Sustainability & Social Impact ..... 104

#### 2.1 TRENDSPOTTING ..... 106

Environmentally Conscious Fashion: Is Sustainability a Passing Trend or an Inevitability  
by Puneet Dudeja, WGSN

#### 2.2 CIRCULARITY ..... 116

Sustainably Reforming the Fashion Retail Industry: Trends in India & Abroad  
by Dr M M Hundekar, SOFT, Pune

#### 2.3 DIRECT TO CONSUMER ..... 120

The Impact of Sustainability on the Fashion Retail Industry Globally  
by Stefan Krueger & Angie Karsama, ProTecht®

#### 2.4 CONSUMER CENTRIC

#### SUSTAINABILITY ..... 124

Is Sustainability a Marketing Fad or Here to Stay?  
by Shardah Uniyal, Brand Consultant

#### 2.5 CULTURE & DIVERSITY ..... 130

The Indian Handloom Industry: A Major Driver of Sustainable Clothing

By Swikruti Pradhan, Rustic Hue

A comprehensive guide to  
consumer centric  
sustainability  
in the fashion retail industry

### Sustainability Initiatives

Allbirds .....	138
ARKET .....	140
ASKET .....	142
Champion .....	144
Fruit of the Loom .....	148
Greendigo .....	150
Loopify .....	152
Lycra .....	154
ROTHY'S .....	168
Threadsmiths .....	170
UNITED BY BLUE .....	172
Vivobarefoot .....	174
Weekday .....	176

INDIA  
BUSINESS OF  
FASHION  
REPORT  
2023

# Contents

## SECTION 3

### Technology ..... 178

- 3.1 THE FUTURE OF RETAIL ..... 180  
Green Glamour: How Technology is Transforming the Fashion Industry  
*by Ganesh Subramanian, Stylumia*
- 3.2 TRANSFORMING TOMORROW ..... 186  
Archroma: Colouring the Future Green, One Sustainable Innovation at a Time  
*by Christophe Maestripieri, Navneet Krishnan, Archroma*

### Sustainability Initiatives

- Bolt Threads ..... 192  
Canopy ..... 194  
CottonWorks ..... 196  
Cradle to Cradle ..... 198  
Dorlet ..... 200  
Ecologi ..... 202  
Intelligent Label Solutions ..... 204  
Lenzing ..... 206  
LanzaTech ..... 208  
Mireille Steinlage ..... 209  
MycoWorks ..... 210  
N9 World Technology ..... 212  
Pangaia ..... 214  
Polartec ..... 216  
Stony Creek Colors ..... 218  
TENCEL™ ..... 220  
Thermore ..... 222  
TômTexTextiles ..... 223

## SECTION 4

### Case Studies ..... 232

- 4.1 ReEARTH FOR TOMORROW ..... 234  
ABFRL's Sustainability Strategy: Focusing on a Product Life Cycle Approach  
*by Dr Naresh Tyagi, ABFRL*
- 4.2 BEYOND TRADITIONAL MODELS ..... 240  
The 'ESG' Journey of Reliance Retail – Fashion & Lifestyle  
*by Akhilesh Prasad, Reliance Retail*
- 4.3 SOCIAL IMPACT ..... 246  
Socially Conscious: How Being Human Helps Build Sustainable Communities  
*by Sanjeev Rao, Being Human Clothing*

### Sustainability Initiatives

- Eastpak ..... 252  
Frank and Oak ..... 254  
Gabriela Hearst ..... 256  
Ganni ..... 258  
Herschel Supply Co. ..... 260  
Marmara Original® ..... 262  
Nisolo ..... 264  
Officiana39 ..... 266  
Oros ..... 268  
ORTA ANADOLU ..... 270  
Sanuk ..... 272  
Softstar Shoes ..... 274  
Unspun ..... 278

- Contributors ..... 280