

The Status of

**EUROPEAN  
FASHION  
REPORT**



2024

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# Introduction

## by the Chairman of the European Fashion Alliance

As Chairman of the European Fashion Alliance, alongside our esteemed Board and Members, we are both honoured and excited to present this comprehensive exploration of the European fashion industry's current landscape. This report is the result of extensive research, collaboration, and forward-thinking strategies, providing a detailed overview of where our industry stands today and where it is and should be headed. The European fashion sector is at a critical juncture, facing urgent demands for sustainability, technological innovation, and the cultivation of a new generation of skilled professionals. The challenges we face—ranging from the need to align with evolving regulations to embracing the digital transformation—are immense, yet the potential for positive change is equally vast.

The power of the creative fashion sector in the sustainability debate is undeniable. Designers and creatives have led the change in promoting sustainable practices and pushing for positive environmental and social change. However, these efforts need more support to enhance the transformation of the sector. It is vital that we provide the necessary resources, infrastructure, and investment to amplify these creative contributions and help them drive lasting change within the industry.

As we navigate this era of transformation, it is clear that the decisions we make today will shape the future of fashion in Europe and beyond. The responsibility that rests upon our shoulders—as leaders, designers, educators, and innovators—is significant. Together, we have the power to steer the industry towards a more sustainable, inclusive, and transparent future. Fashion weeks, as a vital part of the fashion ecosystem, not only showcase creativity but also play a critical role in communicating and informing the broader industry and the public. These events are platforms through which key messages about sustainability and innovation can be shared with a global audience.

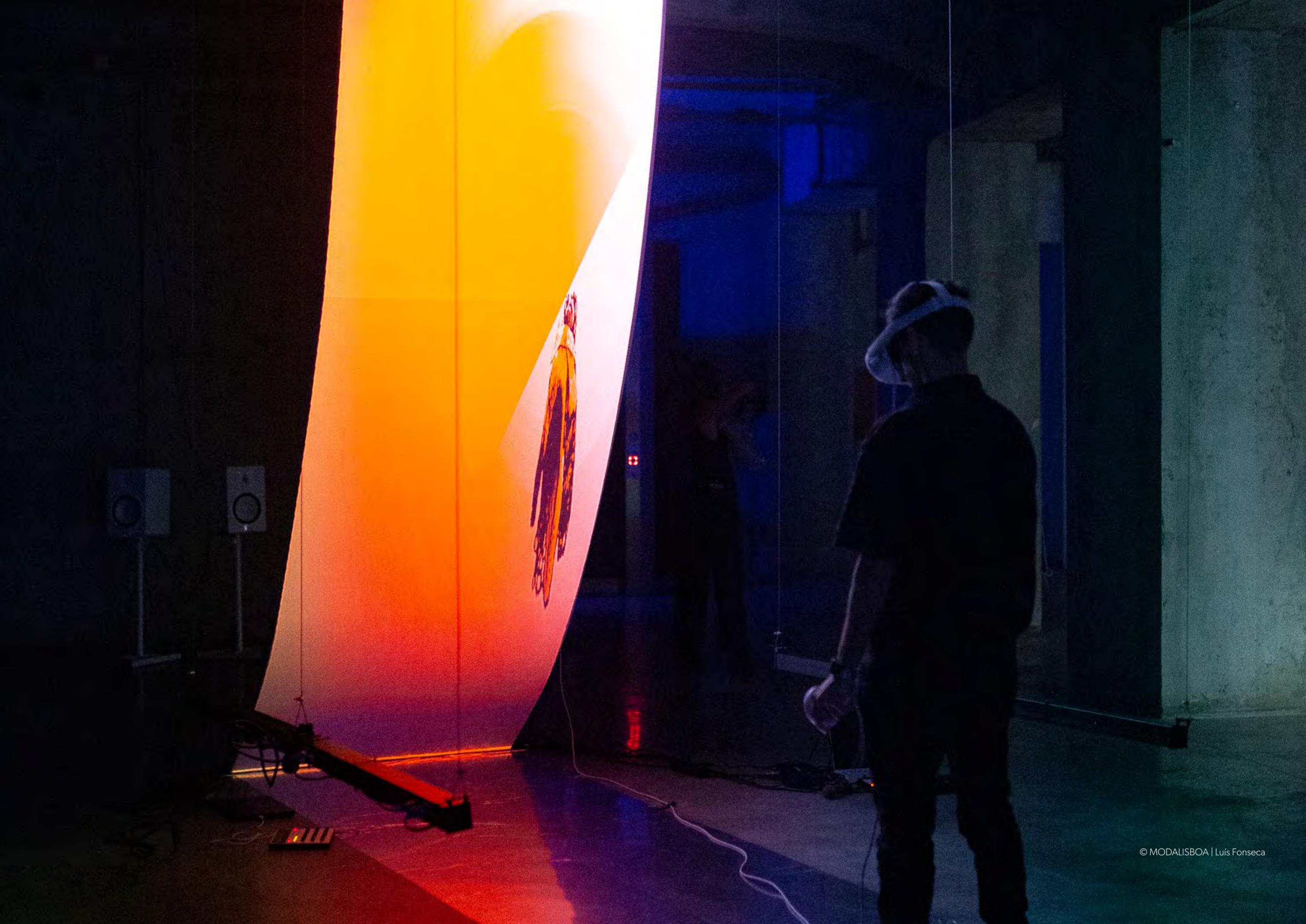
The fashion industry has a powerful and within the fashion & textile industry unique tool in directly communicating with consumers. Brands have the ability to connect with their audience on a personal level, and this power should be harnessed to enhance the transformation process. By using this direct line of communication, the industry can influence consumer behaviour, raise awareness about sustainability, and encourage responsible consumption. This direct relationship gives fashion the potential to lead societal change and shift public perceptions about what is truly valuable in the industry.

This journey cannot be undertaken alone. We strongly encourage every sector within the European fashion industry—whether large or small, established or emerging—to take an active role in this transformation. The challenges we face are not insurmountable, but they require collective action, collaboration, and a shared commitment to change. To achieve meaningful progress, we need all stakeholders around the table—designers, manufacturers, retailers, educators, regulators, and consumers. Collective collaboration: the core spirit of the European Fashion Alliance.

In conclusion, addressing the complexities of the European fashion industry requires a holistic approach—one that encompasses regulatory compliance, technological advancement, and talent development. By embracing genuine sustainability, leveraging emerging technologies, and investing in education and research, we can create a fashion industry that is not only profitable but also ethical, transparent, and sustainable for generations to come.

We invite you to join us on this journey, as we work together to shape the future of European fashion.





# EUROPEAN FASHION ALLIANCE VALUES

Founded in 2022, the European Fashion Alliance (EFA) is the first transnational alliance of European fashion institutions and organizations, uniting creative fashion brands and houses, including both emerging and established designers. EFA aims to empower a prosperous European fashion ecosystem. EFA is a strong common voice advocating for and accelerating the transition of European fashion towards a more sustainable, innovative, inclusive and creative future.

This fashion sector plays a crucial role in preserving cultural heritage, fostering diversity, driving entrepreneurial creativity and encouraging intercultural dialogue. Creativity is a continuous driving force for these brands, reflected in their work. Additionally, the pursuit of sustainability is a fundamental aspect of their motivation. High quality and craftsmanship are hallmarks of their identity.

Creative fashion houses play a significant role in the European fashion industry's manufacturing and employment sectors. Overall, this creativity-driven industry is distinguished by a strong sense of identity, innovation, uniqueness, and awareness of sustainability. With a strong commitment to social and environmental responsibility, designers and industry stakeholders work together to promote positive change and foster a more ethical fashion ecosystem for future generations.

EFA is driven by:

## Our European Identity

### 1. Promoting European values

The entire creative fashion community operates in full alignment with European humanistic values. It builds upon the foundations of Europe's cultural heritage. As a significant creative industry, fashion draws inspiration from various cultural movements, including the aesthetic legacies of the Renaissance, Arts and Crafts, Art Nouveau, and their European counterparts, as well as Bauhaus and modernism in general, and postmodernism. It also builds on the achievements of influential fashion figures from the past. In line with the Enlightenment philosophy, this community is committed to tolerance, freedom, and diversity, while upholding sustainability, ethics, creativity, and innovation as its core values.

## Our Creative Drive

### 2. Creativity as a motto

Creative fashion houses are driven by creativity in all circumstances. Most of these houses and brands are led by designers or artistic directors who have strong artistic and cultural backgrounds, typically acquired through education in art or fashion schools that integrate courses in art and culture. As they evolve, many of these houses transition to being led by a designer-manager duo or team. Creativity is often viewed as a valuable asset that draws from heritage while simultaneously engaging with modernity. This balance helps define a unique style that harmonizes stability with novelty, allowing for the prefiguration of new trends, appearances, emotions, and ways of living. This dynamic is perfectly reflected by designers collections and their surroundings.

03

### 3. Fashion as an anchor for creative communities

Creative fashion designers are central to contemporary artistic communities, which include visual artists, scenographers, architects, musicians, and filmmakers. They consistently collaborate with these talents to create collections, products, and various creative works and communicate about them. Additionally, creative fashion professionals play a crucial role in strengthening the ecosystems of the creative industries through their interdisciplinary approaches and the impact of their initiatives.

04

### 4. Fashion Weeks as cultural events

Fashion shows are essential for fashion designers and artistic directors, similar to how exhibitions serve visual artists and concerts benefit musicians. These shows are not only copyrighted works but works of art in their own right. They strive to embody the concept of a „Total Work of Art.“ Their primary role is cultural, as evidenced by their locations in the heart of Europe’s heritage capitals. These venues are rich in history or reflect contemporary themes, carefully selected to resonate with the spirit of the collection and the overall set design. Fashion Weeks uniquely coordinate and enhance fashion shows, increasingly resembling meaningful festivals, with Europe leading the way and influencing trends globally.

## Our Sustainable Drive

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### 5. Sustainability as an axiom

Creative fashion houses are closely linked to durability and the drive for sustainability. They prioritize local and European production to give greater meaning to their creative work, relying on exclusive skills that need preservation. The identity of their thoughtfully designed and technically complex collections and products is something to be cherished and appreciated over time. Customers and clients are motivated to connect with a creative project and designer, embracing a particular style and the imaginative universe of a collection. Creative designers, especially younger generations, are also engaged in new sustainable models, including the increasing use of deadstock and practices like upcycling and eco-design. The circular economy has naturally become a priority in their work.

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### 6. Fostering environmental-based policies

Creative fashion houses are deeply concerned about the environmental challenges we all need to address. Their prominent status, tied to the high reputation of various brands and the designers themselves, positions them as exemplary role models. The councils representing these houses, and thus EFA, support European initiatives and reforms that facilitate the implementation of environmentally focused policies, promote a circular economy, and enhance consumer information. They advocate for complete alignment between brand and public policies to ensure continuous joint progress.

### 7. Fostering social-based policies

Corporate Social Responsibility (CSR) policies address both social and environmental issues, as these two areas are interconnected. Creative fashion houses are fundamentally human-centered organizations that involve a diverse range of talents. Their presence on the catwalks increases their visibility regarding social awareness. By emphasizing social factors such as local employment opportunities, skill development, improved production conditions, fair wages, diversity, inclusivity, and gender equity, they assert their commitment to social engagement.

## Our Economic Drive

### 8. Cultivating quality rather than quantity

High-quality craftsmanship and technical expertise are essential to Creative Fashion Houses. These brands often produce small volumes and limited series, a trend seen not only in emerging designers and small to medium-sized enterprises (SMEs) but also among established and renowned large brands. Creative Fashion Houses are leading the way in recognizing post-industrial craftsmanship as a model for contemporary production. While it is important to acknowledge the role of the mass market, which allows people to dress as they wish, we must also highlight the significant sustainability challenges posed by high volumes of production. These challenges are exacerbated by the high price elasticity associated with mass-market and fast fashion brands. In contrast, creative brands promote a philosophy centered on valuing what we care about and cherish over time.

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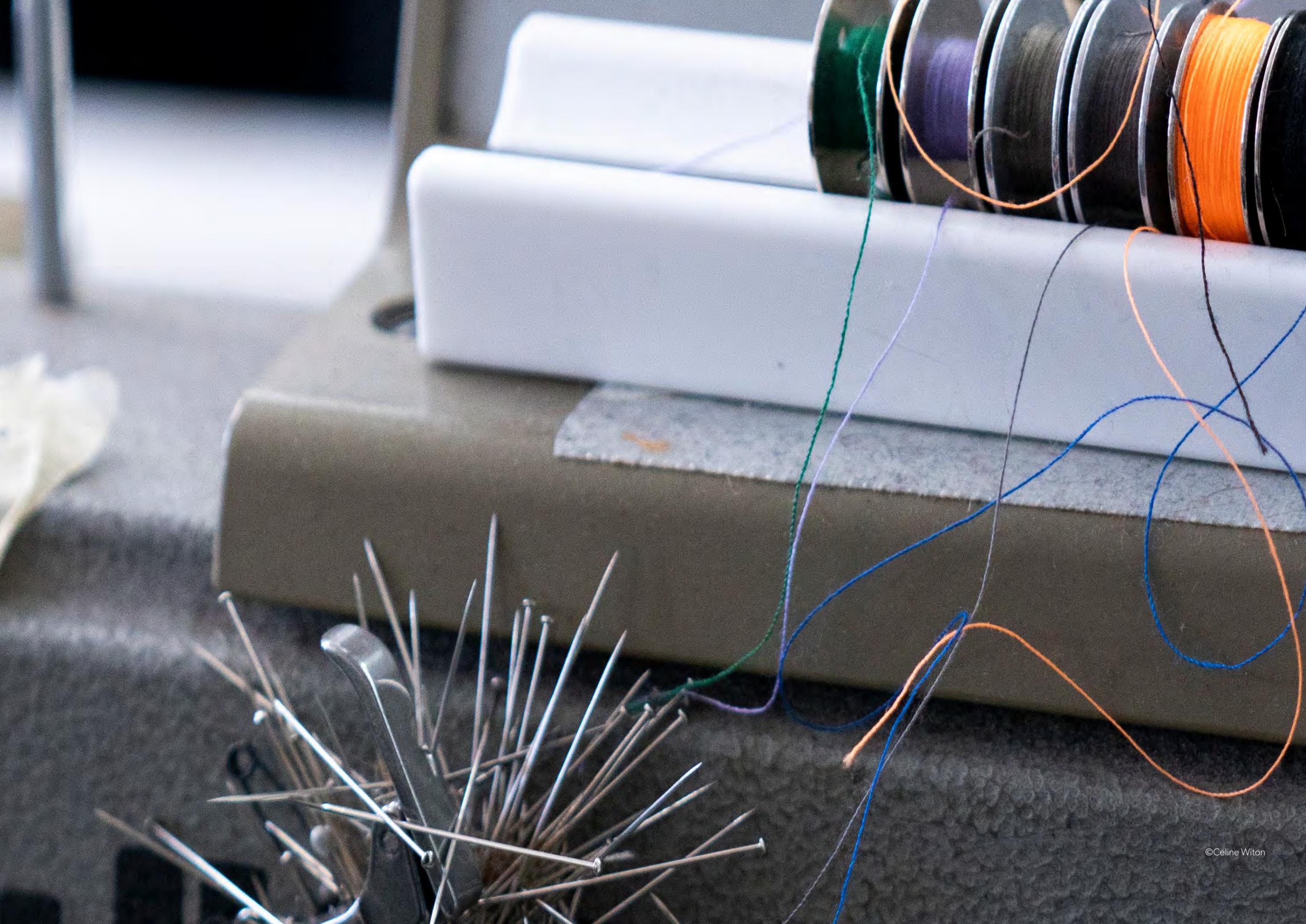
**09****9. Highly supporting manufacturing and employment in Europe**

Creative fashion houses not only embody the highest standards of craftsmanship and creativity but also play a significant cultural role and contribute substantially to fashion manufacturing and employment in Europe. This includes textiles, clothing, and a variety of fashion accessories, such as leather goods. At a time when reindustrialization and industrial sovereignty are priorities for Europe, designer brands and high-end fashion are vital due to their reliance on high technical skills, their industrial costs, and their strong non-price competitiveness. These sectors represent realistic and accomplished areas for European manufacturing and employment. Additionally, it is essential to acknowledge their role in preserving the know-how that is central to European fashion.

**10****10. Innovation and knowledge as key factors for the future**

Creative fashion houses constantly navigate the intersections of Low Tech (handcraft and traditional skills), Mid Tech (classical industrialization and supply chain processes), and High Tech (the implementation of new technologies). Innovation in High Tech, driven by research and development (R&D) and applied research, is crucial across all segments of textile manufacturing. This includes advancements in robotics, recycling technologies, circular processes, information systems, artificial intelligence, and more. Innovation not only signals the emergence of new business models and uses but also exemplifies the significant impact of the digital revolution. This approach is essential not only for maintaining but also for nurturing, updating, and enhancing the collective knowledge of fashion designers, managers, engineers, technicians, workers, and all other talents involved in the realms of fashion creativity, expertise, and sustainability.



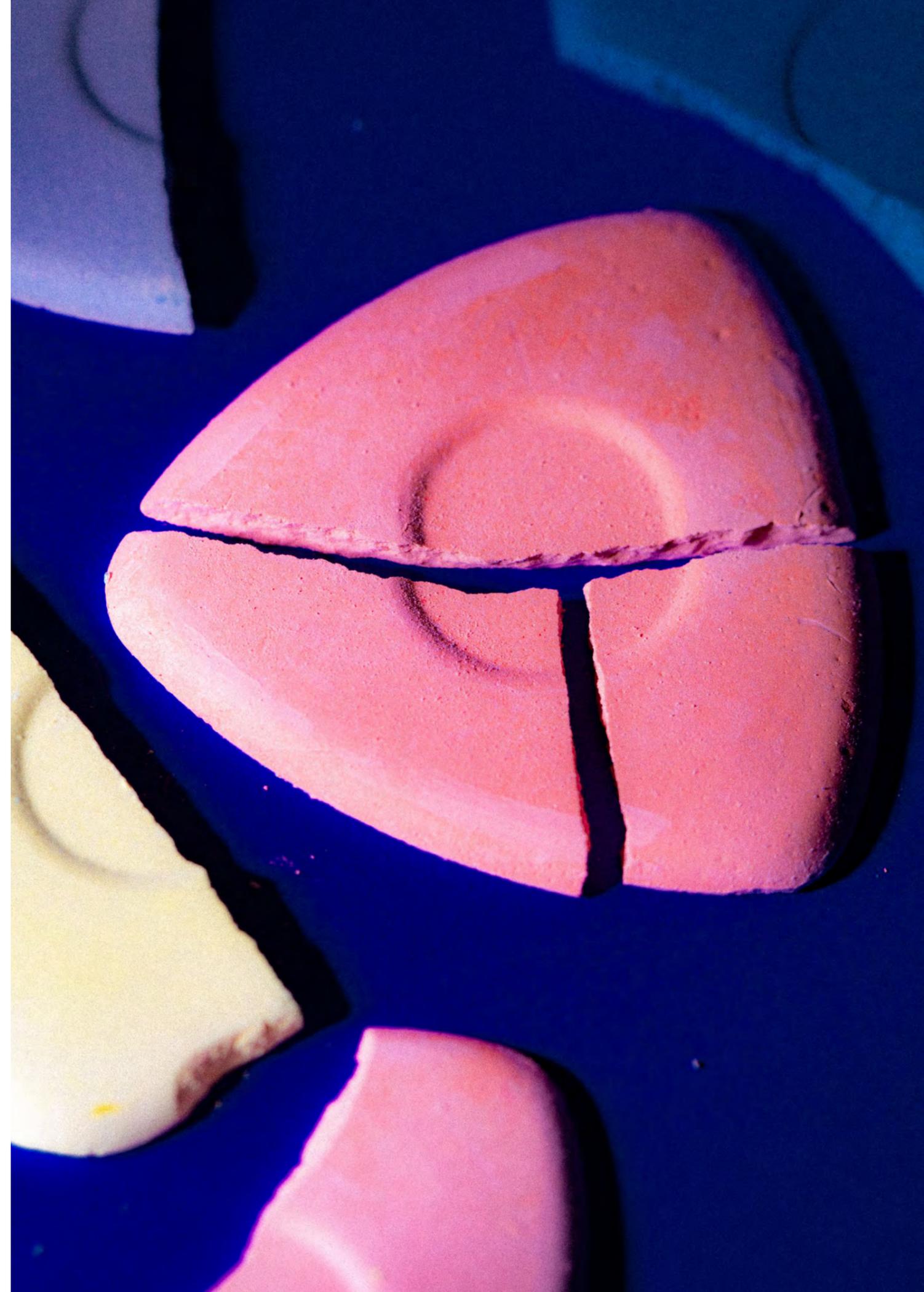


# METHODOLOGY

## Survey methodology

The “Status of European Fashion” report is based on a comprehensive methodology that combines both quantitative and qualitative approaches to provide a robust analysis of the European fashion industry. The quantitative data stems from a survey conducted with 211 industry representatives, carried out in collaboration with EFA’s 27 members. This survey aimed to capture a broad spectrum of insights across various perspectives of the fashion industry, ensuring a representative overview of current trends, challenges, and opportunities.

To deepen and contextualise the survey results, qualitative interviews featuring prominent industry opinion leaders and experts were conducted. These interviews provided nuanced perspectives and rich, detailed insights that complement the quantitative data. Their contributions have been instrumental in refining the analysis and offering a more comprehensive view of the sector’s dynamics.



# Summary

The European fashion industry is undergoing transformative changes, driven by the urgency for sustainability, technological advancements, and educational needs. The sector at large faces increasing regulatory and societal pressure to address environmental impacts, adopt new technologies, and train a workforce equipped to handle future demands. This report explores the landscape of the European creative driven fashion industry, renowned for creativity and innovation, detailing the hurdles, opportunities, and strategies for advancing towards a more sustainable and technologically integrated future.

The report is based on a survey conducted among 211 creative driven industry representatives, supplemented by qualitative interviews with leading opinion leaders. This mixed-methods approach ensures a comprehensive understanding of the trends, challenges, and opportunities in European fashion.

# Chapter 1

## Public Perceptions and Image of the Fashion Industry

There is widespread recognition of the negative public perception of the fashion industry, largely driven by concerns about ethics and sustainability, driven by profitable business models promoting rapid consumption at the expense of quality and value. Restoring trust in Europe's textile industry has become a crucial endeavour now.

### Key Concerns

- Environmental impact
- Overproduction and quality in the fashion industry
- Social aspects

### Solutions

- Improving sustainable business models in the industry
- Educating consumers about the environmental impacts of their purchases and the roles of quality and craftsmanship as critical to sustainability. Brands need to address the public's growing concerns about greenwashing and overproduction.
- Transparency in production practices

# Chapter 2

## Sustainability as a Cornerstone

Sustainability is now an integral part of the conversation in European fashion. A large majority of companies are investing in sustainability practices driven by consumer demand, regulatory pressure, and a general shift in corporate responsibility. However, while 88% of surveyed organizations have invested in sustainability, over 50% still lack the tools or support needed for a full transition to sustainable practices.

### Focus Areas for Sustainability

- Implementing repair, recycling & reuse programs and waste reduction
- Sourcing lower - impact materials
- Improving social durability

### Challenges

- High cost and lack of accessibility of sustainable materials and support
- Lack of proper infrastructure for recycling and repair
- Misaligned regulatory standards across Europe
- Lack of social sustainability impact measurement

### Innovative Materials

- Companies are experimenting with recycled textiles, bio-based fibres, and semi-synthetic materials. However, there are significant challenges in incorporating these materials into high-end fashion items.

# Chapter 3

## Directives and Regulations

The European Union is advocating for stricter regulations to promote sustainability in fashion. The Ecodesign for Sustainable Products Regulation (ESPR) is a key player in this movement, urging companies to design products with sustainability in mind. The ban on the destruction of unsold goods, the reduction of microplastics, and a focus on product longevity are some of the key initiatives.

### Challenges

- Limited awareness and understanding of the ESPR among fashion companies
- A cross-sector regulation needing to properly encompass the specificities of different segments of the fashion industry

### Key Issues

A cross-sector regulation needing to properly encompass the specificities of different segments of the fashion industry

- Complexity and cost of technical assessments of durability
- Complexity and feasibility of reusability
- Technological and logistic obstacles of recycling
- Distinction between recyclable and non-recyclable materials
- Lack of labor and financial resources of reparability
- Technological limitations and cost-effectiveness of recycling processes
- Good understanding of microplastics

# Chapter 4

## Digitization of the Fashion Industry

Digital transformation is reshaping how fashion operates, with technologies such as artificial intelligence (AI), blockchain, and the Digital Product Passport (DPP) offering significant advantages in transparency, efficiency, and sustainability. Despite this, only a portion of the industry has fully adopted these tools, with many companies citing high costs and a lack of technical expertise as barriers.

### Challenges

- Data collection and endless regulation concerns on DPP
- Cost reduction & efficiency interest for the use of emerging technologies

### Key Technologies

- AI and machine learning to optimize the design and sales process
- Blockchain for supply chain transparency
- Metaverse and virtual technologies for digital fashion experiences

# Chapter 5

## Education & Research

There is a clear need for skill development and collaboration between fashion companies and educational institutions. Companies are seeking employees with expertise in sustainability, digital technologies, and creative design. However, 39% of companies surveyed do not provide adequate training programs for these skills.

### Key Areas for Education

- Sustainability and circular fashion practices
- Business and technical skills
- Innovation in design and production processes

### Collaborations

- 41% of companies have already partnered with educational institutions, while 69% plan or desire to engage in such collaborations. These partnerships are essential for developing the next generation of fashion professionals.

## Conclusion

The European fashion industry is at a pivotal moment where sustainability, technological innovation, and talent development must converge to secure its future. The industry can transition towards a more ethical, transparent, and sustainable business model by embracing new regulations, adopting cutting-edge technologies, and investing in workforce education.

Despite the strong will and desire to transform the industry from the inside and adopt sustainable practices, significant barriers hinder many brands from making substantial changes. A significant lack of knowledge, financial resources and human capacity are pressing as brands face increasingly stringent environmental and social regulations. Clear and standardized guidelines, as well as financial support and incentives to bridge the financial gap and invest in dedicated personnel to enable companies to adopt greener practices.

Industry-specific roadmaps that simplify compliance processes would help businesses align with sustainability goals more easily and avoid missteps.

Additionally, collaboration among policymakers, industry leaders, and educators is key to navigating these complex changes.

This report underscores the urgency of change within the European fashion industry and provides a roadmap for how industry stakeholders can collaborate to build a more sustainable, innovative, and inclusive future.



Katie O’Riordan

Co-founder, CEO

Kinset, Ireland

**“Everyone should play a role. Consumers play a crucial role in driving change through their purchasing decisions and demand for sustainable, ethically produced clothing. Fashion and textile companies are also responsible for prioritizing ethical and environmentally friendly practices in their operations. Policy plays a vital role in setting standards, regulations, and incentives that encourage responsible practices and hold companies accountable for their environmental and social impact.”**



# Chapter 1

## PUBLIC PERCEPTIONS

### Restoring Trust in Europe's Textile Industry

**66%**

**believe** the general public image of **the fashion industry** is „rather negative“ or „negative“.

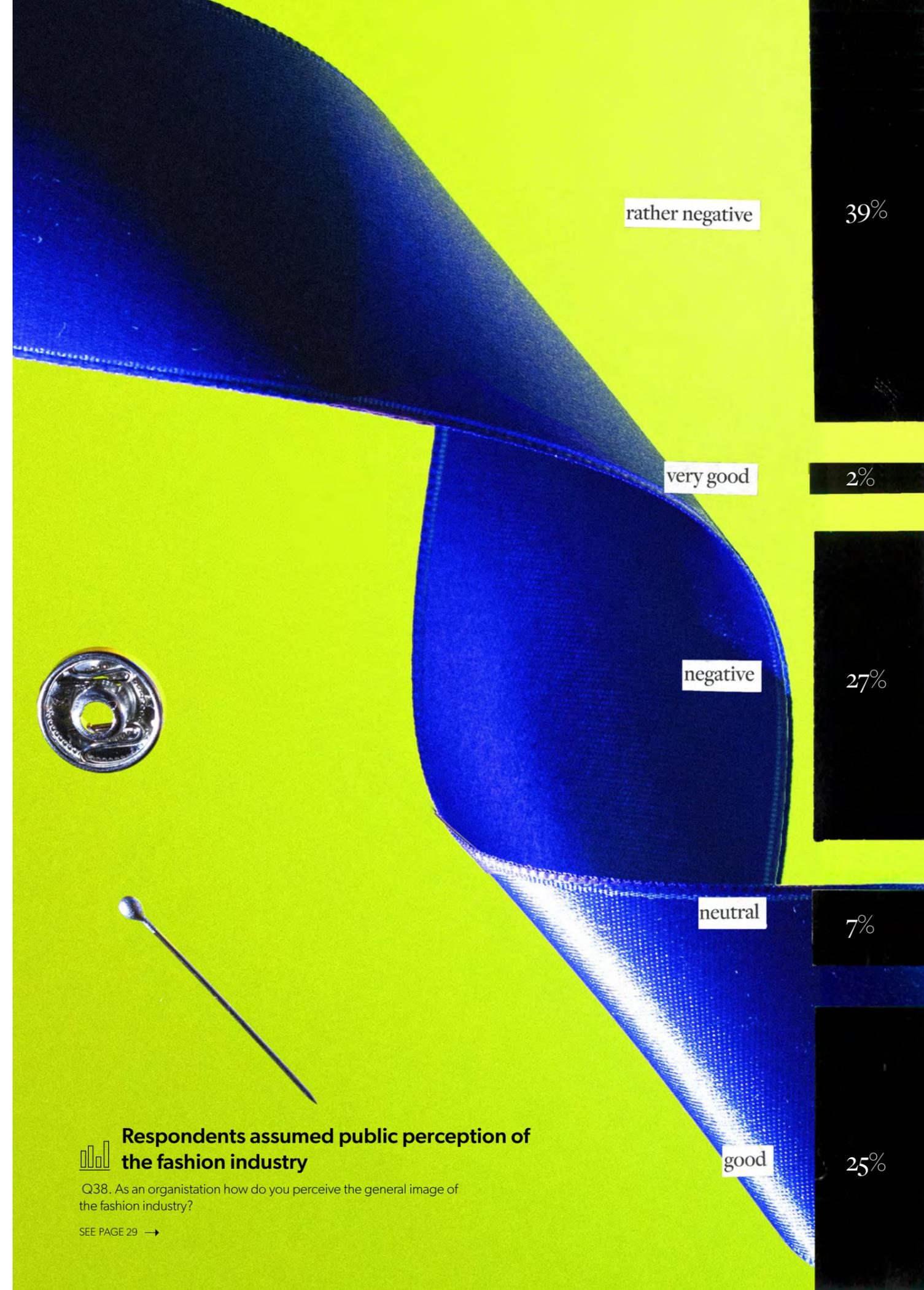
There is no getting around it: the fashion industry grapples with an image problem. This dilemma is primarily rooted in issues of ethics and sustainability, with an industry exacerbating the situation by fostering rapid consumption that often comes at the expense of environmental and ethical standards. This perceived erosion of consumer trust is evident: 66% of respondents believe the general public image of the fashion industry is “rather negative” or “negative.” We asked brands and experts what the issues are and what can be done to improve this image problem.

### Why Such Negative Views?

When asked to elaborate on why they believe the public views the fashion industry negatively, a considerable proportion of respondents pointed to environmental and ethical concerns. Respondents to our surveys frequently cite the massive scale of pollution and carbon emissions resulting from fashion industry practices, alongside the industry's general disregard for sustainability in favour of low prices.

### Image Solutions: How to Improve Public Opinion

Three significant points seem to dominate the discussion on improving public opinion on European fashion. Firstly, there are the underlying sustainability issues relating to textile production. Secondly, it is essential to educate consumers on adopting lower-impact buying behaviours and the role of quality and craftsmanship as critical to sustainability. Brands need to address the public's growing concerns about greenwashing and overproduction. Thirdly, the industry is confronted to a lack of reliable information, data, and communication on the actual impact of fashion.



**Respondents assumed public perception of the fashion industry**

Q38. As an organisation how do you perceive the general image of the fashion industry?

SEE PAGE 29 →



**Andre Lhamas**  
Head of Business Development  
Platform E, Portugal

“The current fashion model and its underlying approach need significant improvement. Overproduction, in particular, stands out as one of the most critical issues. It’s understandable why the public often views fashion critically, given the frequent news about surplus collections ending up as waste or being shipped abroad. Responsibility spans the entire value chain, and raising awareness is one of the most impactful ways to address this. Fortunately, awareness is growing, especially among younger generations, who are becoming more conscious, responsible, and discerning in their choices of brands.”

**Andrée-Anne Lemieux**  
Sustainability Director,  
Institut Français de la Mode, France

“There is a real need to raise awareness of fast fashion’s impact. Most consumers do not know about their consumption impact. From the fashion and textile companies and policymakers’ sides, there is a need for assessment and development of new tools to share this information in order to create decision-making facilitators for consumers.”

**Van de Velde Group**  
Belgium

“The brands themselves have a clear task, but the government also carries a great responsibility. Remember the campaigns against smoking? General awareness campaigns mainly work from a higher level.”

**Michele Casucci**  
GM & Founder, Certilogo, Italy

“The industry’s reputation suffers from accusations of pervasive greenwashing and the dissemination of misleading information regarding its sustainability efforts. This requires decisive action by launching tangible initiatives that drive meaningful change. This includes overhauling production methods, adopting Ecodesign regulations, and implementing technologies for enhanced traceability and compliance monitoring.”

**Pablo Erroz**

**CEO**

**Pablo Erroz, Spain**

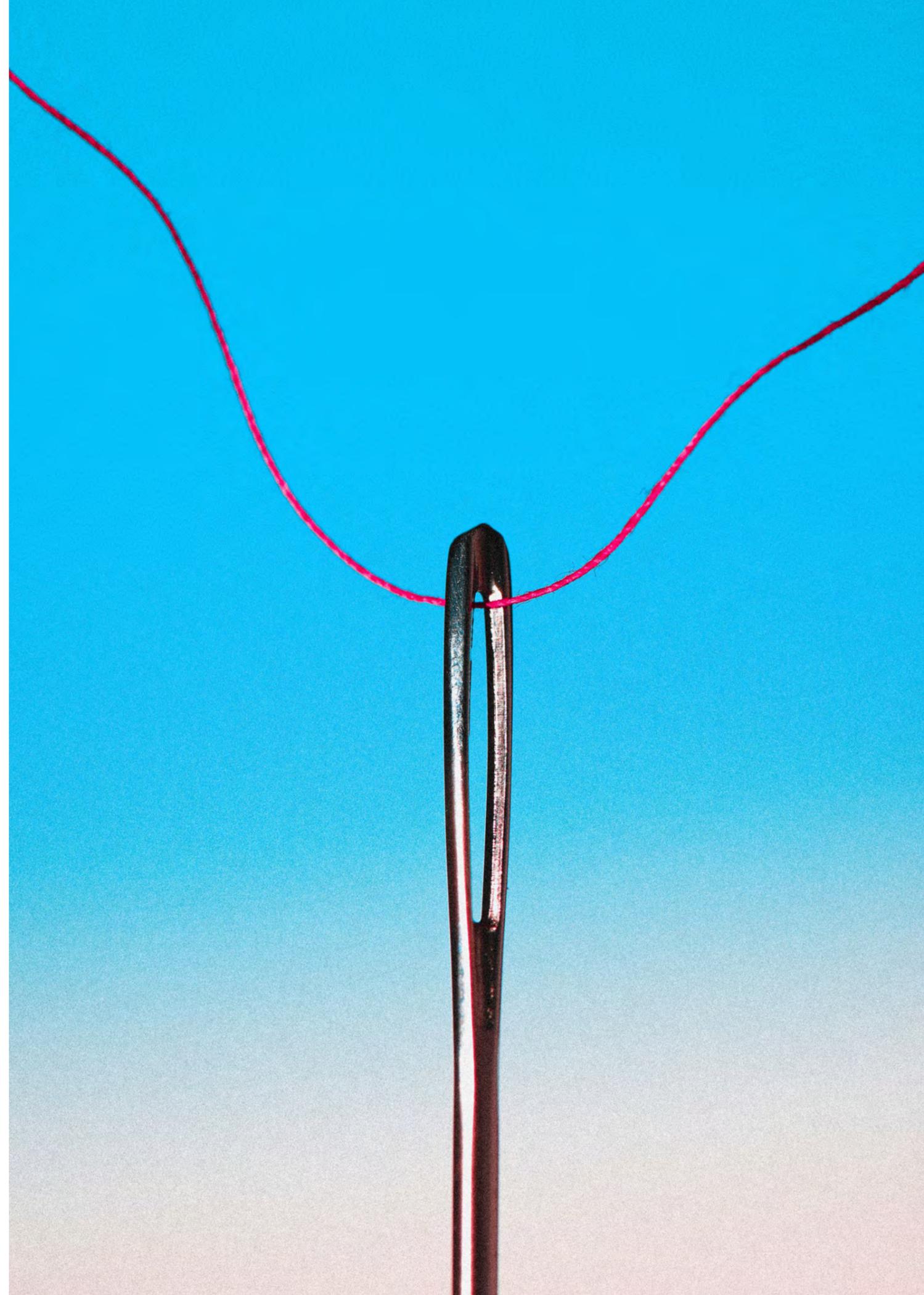
**“We have to ensure that the purchasing decision is not dictated by the lowest price.”**

### Made in Europe?

The „Made in Europe“ label has been proposed as a potential solution to help. With 64% of respondents believe it could help reduce the fashion industry's carbon footprint. Michele Casucci, GM of Certilogo argues that legislation supporting Made in Europe products should be adaptable to the financial constraints faced by SMEs, ensuring they are not unduly burdened.

# 64%

of respondents **believe a**  
**“Made in Europe” label could**  
help **reduce the fashion industry's**  
**carbon footprint.**





# Chapter 2

## SUSTAINABILITY

### Sustainability as a Cornerstone of Modern Fashion

One thing that is clear from our study is that today, no one can talk about European fashion without mentioning sustainability. Today, sustainability is increasingly becoming an integral part of the fashion conversation. This reflects a growing awareness and consumer demand for ethical practices. The shift in values on the consumer side is primarily driven by Millennials and Gen Z, along with upcoming European regulatory pressure on traceability, production responsibility, and eco-design. The current climate of corporate responsibility and thought leadership also play a role in challenging the industry to transform and invest more in sustainable practices and innovation.

A large majority of respondents report investing in one or more sustainability practices—either financially or in human capital. Expanding the product’s lifespan should become one of the key priorities for the fashion industry.

# 88%

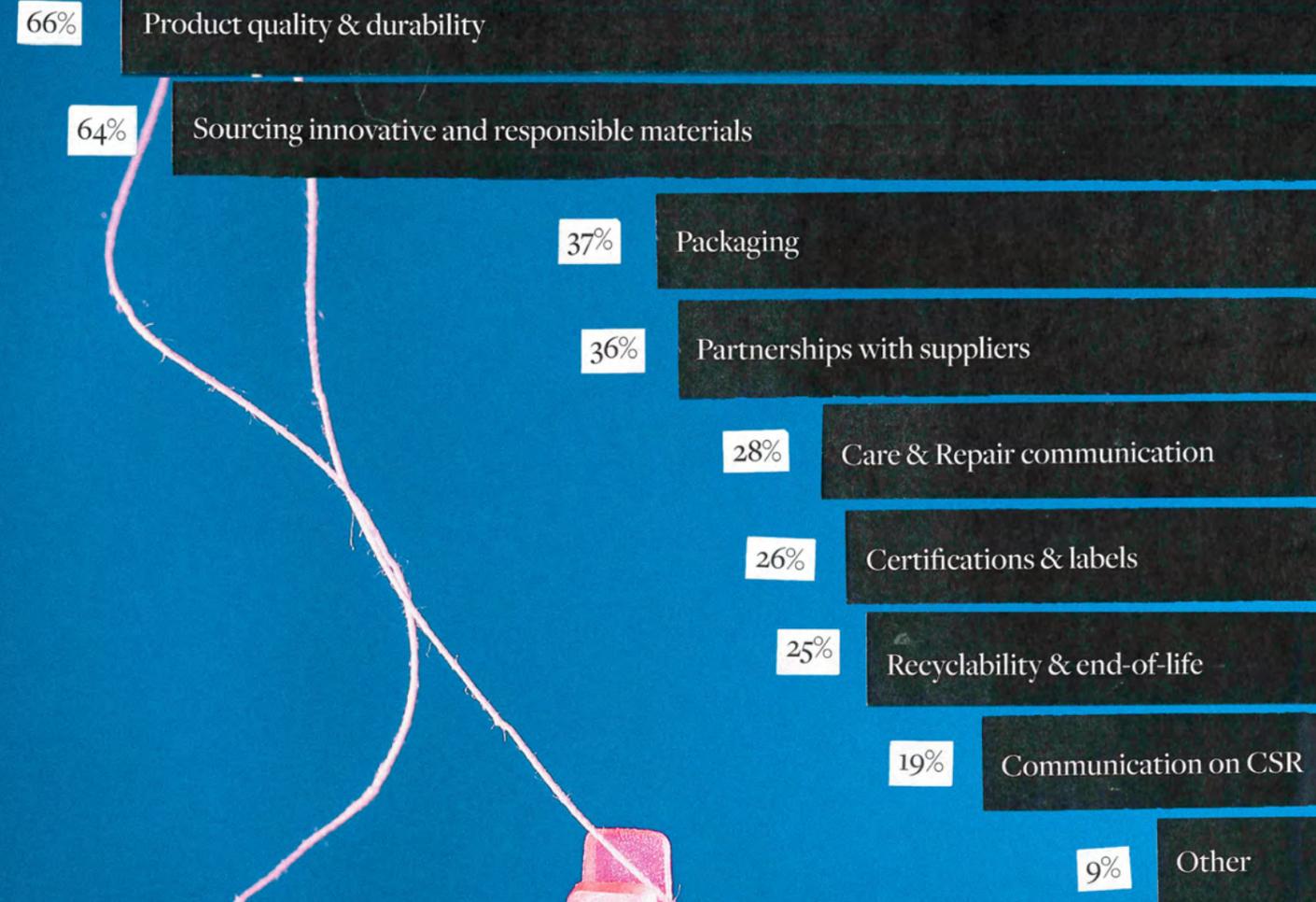
of responding organizations say they **invested financial or human resources to commit to sustainability.**

This is evident from our survey, 88% of responding organizations say they invested financial or human resources into sustainability-related activities. Primary focus areas include sourcing responsible materials (64%) and improving product quality and durability (66%).

### Investment areas

Q13. Has your organisation invested financially and/or human resources to commit to sustainability? If yes, please indicate the top 3 fields you have invested in the most?

→ SEE PAGE 37



## Tools for the transition to sustainability

Q16. Are you already equipped with a tool or support to make your organisation ready for a transition to a more sustainable business with/on?

→ SEE PAGE 39

# 59%

of companies say they **still lack the tools or support** for high-quality practices needed **to transition to a more sustainable business.**

**“When companies dedicate a person to the role of sustainability manager, they call attention to the subject every day. It’s not about an unwillingness but about making sustainability top-of-mind.”**

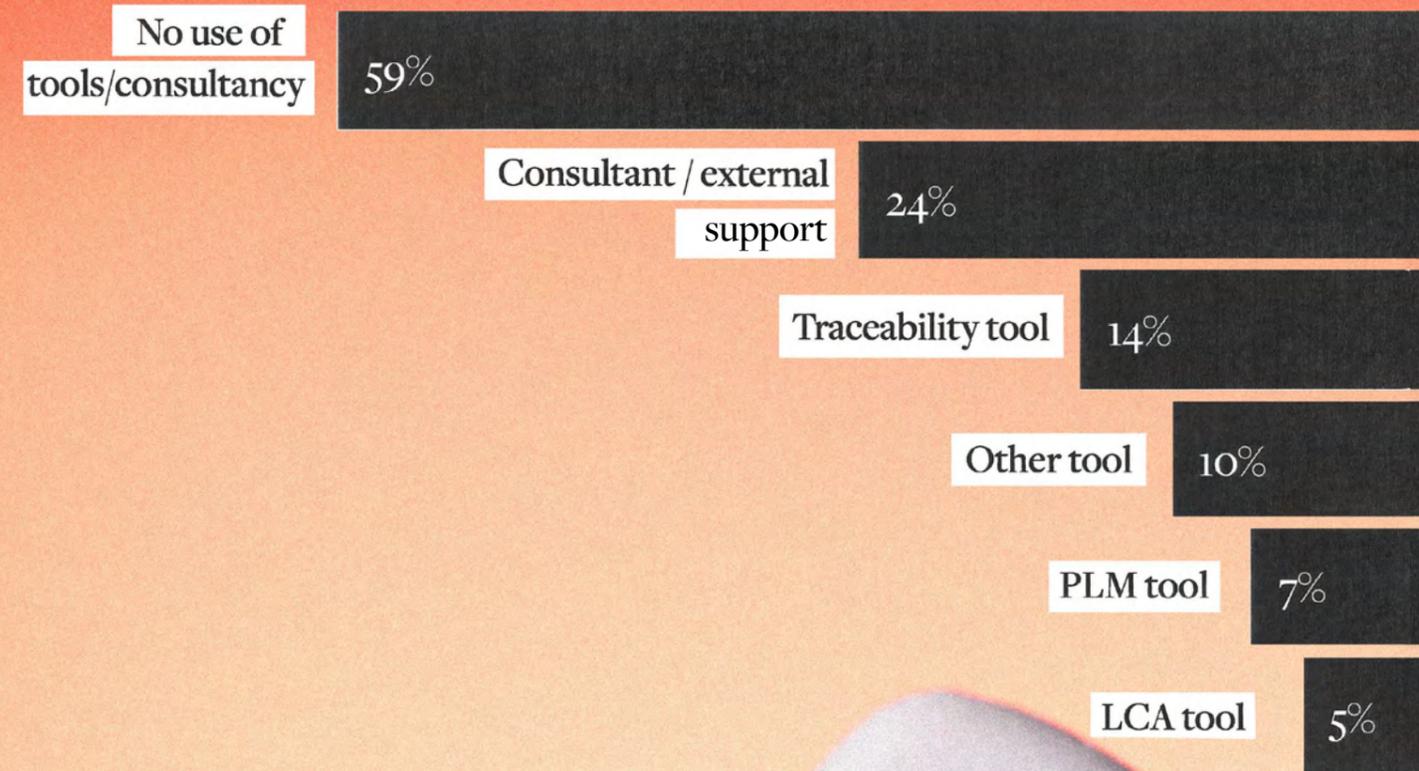
**Van de Velde Group**

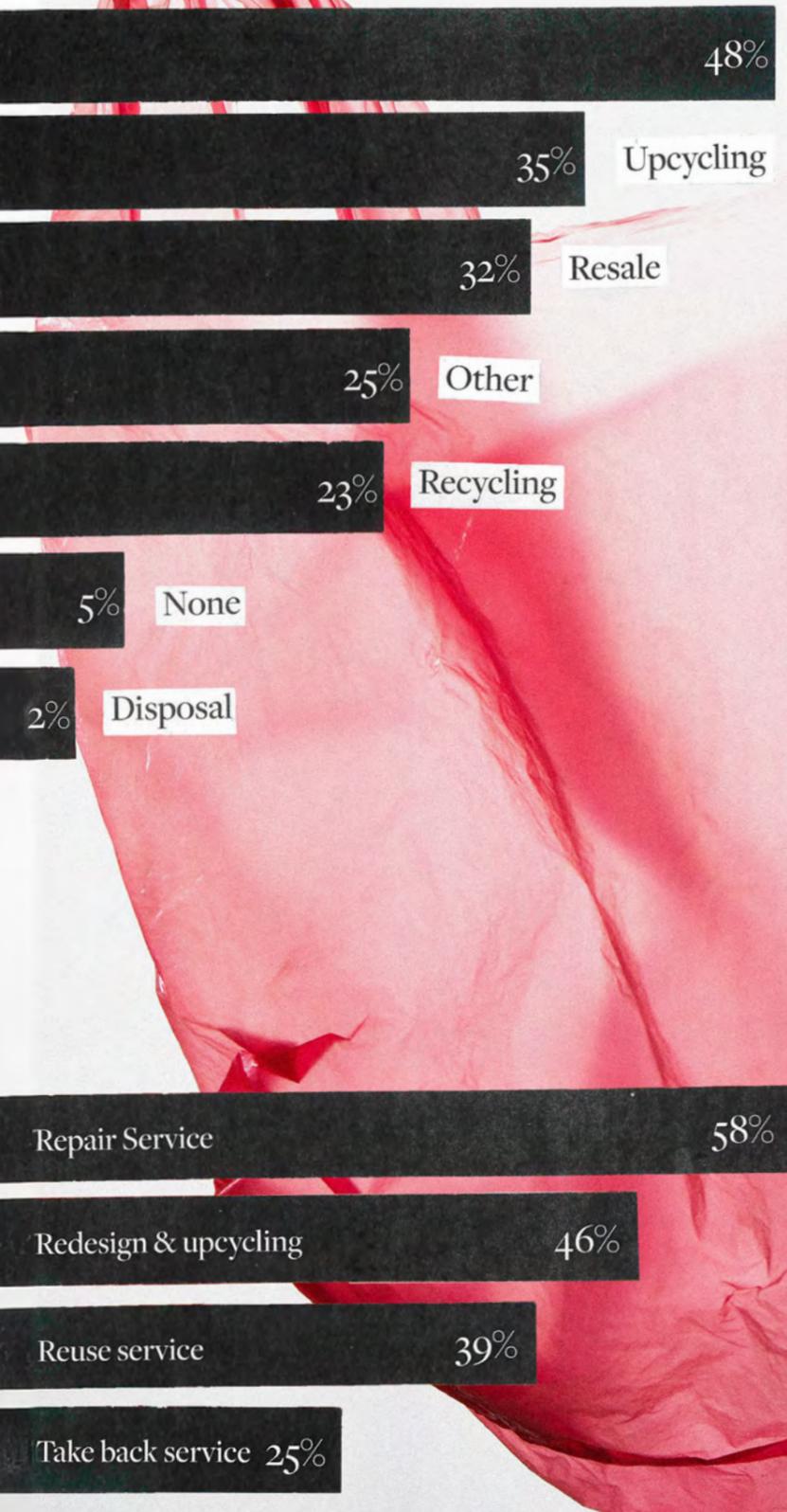
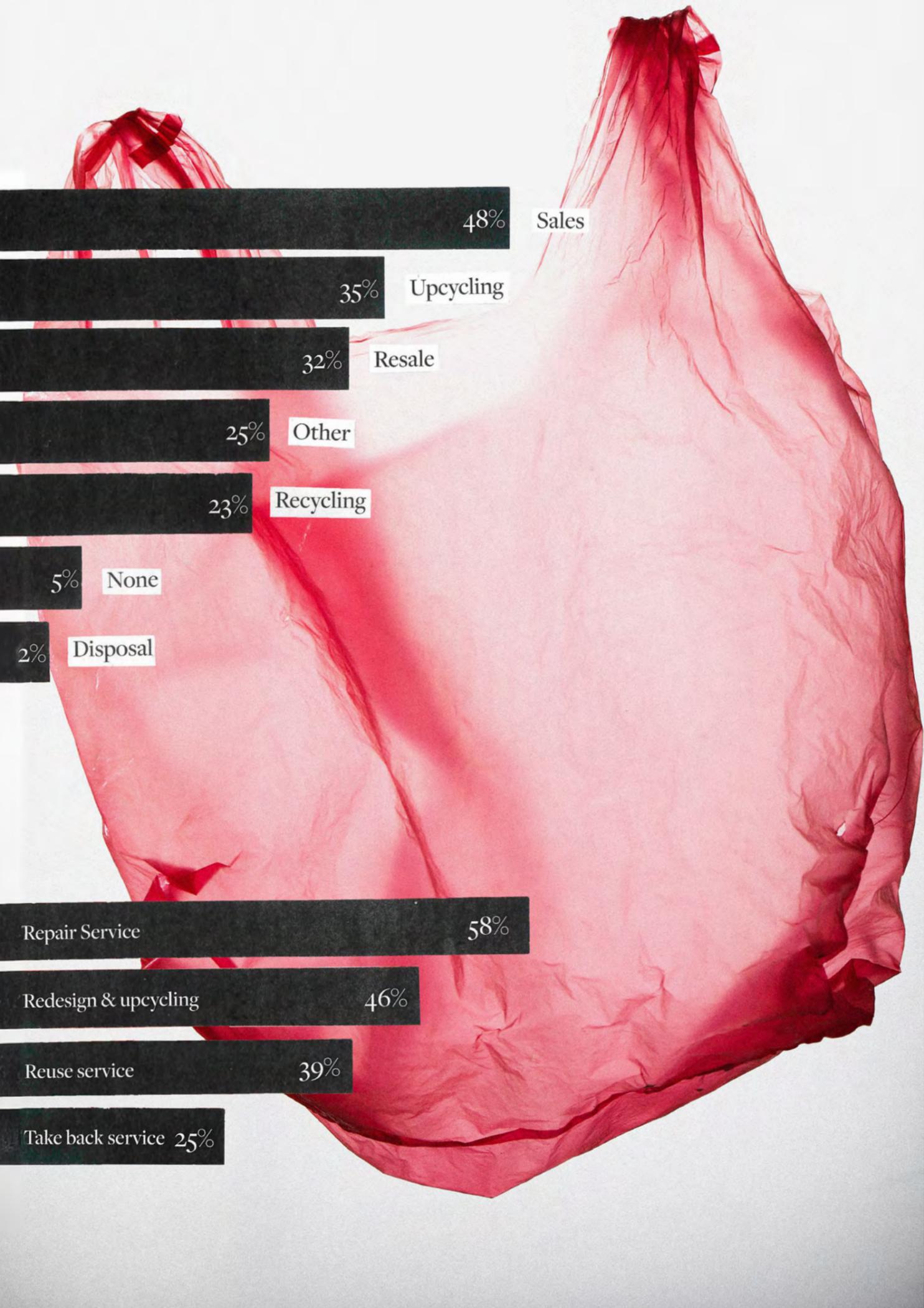
**Belgium**

# 75%

report that they **don’t use innovative solutions** to ensure product traceability.

Despite the commitment to sustainability, 59% of companies say they still lack the tools or support for high-quality practices needed to transition to a more sustainable business.





### Management of unsold goods

Q19. How do you deal with the management of your unsold goods?

SEE PAGE 40 ←



**Reet Aus**  
 Head Designer & Senior  
 Researcher  
 Estonian Academy of Arts,  
 Estonia

“Currently, nothing supports good quality practices. If you want to support local craftsmanship and high-quality clothes, we must rethink how our market works. It’s quite complicated because we can’t just wait for the customer to get rich or for them to change their mindset, so it has to be regulated somehow.”

### Focus Areas for Sustainable Practices

The push towards sustainability spans across various facets of the fashion industry. Many organizations have implemented recycling and reuse programs to reduce waste. Notably, 56% of participating organizations have implemented recycling or reuse programs to reduce the waste generated from their value chain. The most common strategies for keeping products in circulation or extending their lifespan include repair services (58%), redesign, and upcycling (46%).

Our survey on unsold goods management among respondents reveals that the majority of unsold goods are primarily handled through sales (48%), upcycling (35%) and reselling (32%), while the respondents, mainly represented by SME brands, claim their unsold goods for a very small percentage (2%) resort to disposal.

### Activities to expand product lifespan

Q18. What measures is your organisation applying for the extension of the life span of your products?

SEE PAGE 40 ←

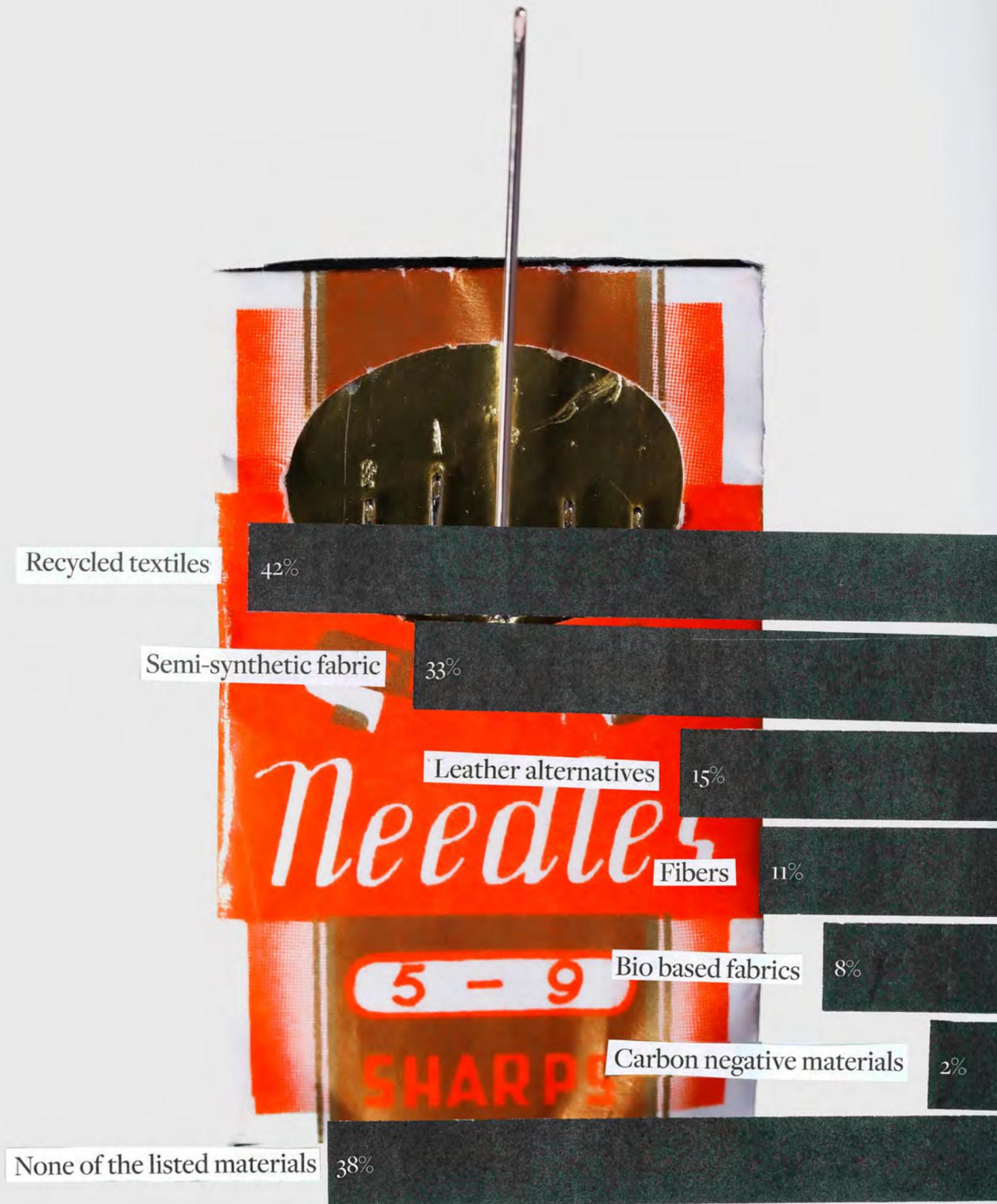
### Innovative Materials and Their Impact

The use of innovative, lower-impact materials is another primary focus. 62% of companies use innovative lower-impact materials such as recycled textiles or bio-based fibres. Recycled textiles are the most commonly used (42%), followed by semi-synthetic fabrics (33%), leather alternatives (15%), and other innovative fibres (11%). However, experts like Dace Akule from Green Liberty (Latvia) suggest that closed-loop recycling should be prioritized over less effective practices such as PET bottles being recycled into synthetic fibers.

#### Use of innovative low impact materials

Q33. Are you currently using any innovative materials?

→ SEE PAGE 43





**HUGO BOSS AG**  
Germany

“As a premium brand and a global player, we recognize the complexities of incorporating recycled fibers into high-quality and creative fashion items. Challenges such as material characteristics, technology limitations, and availability of high-quality recycled materials can complicate this process. Despite these hurdles, we are committed to innovation and continually improving our use of sustainable and recycled materials across our collections.”

**Andre Lhamas**  
Head of Business Development,  
Platform E, Portugal

“We no longer use fashion products to the extent that we should. Fast and affordable fashion has clearly changed consumption patterns, making buying a new item easier than fixing the old one. With this upcoming regulation and change in consumer demand, I think we’ll see plenty of initiatives in terms of repurposing and repairing products.”

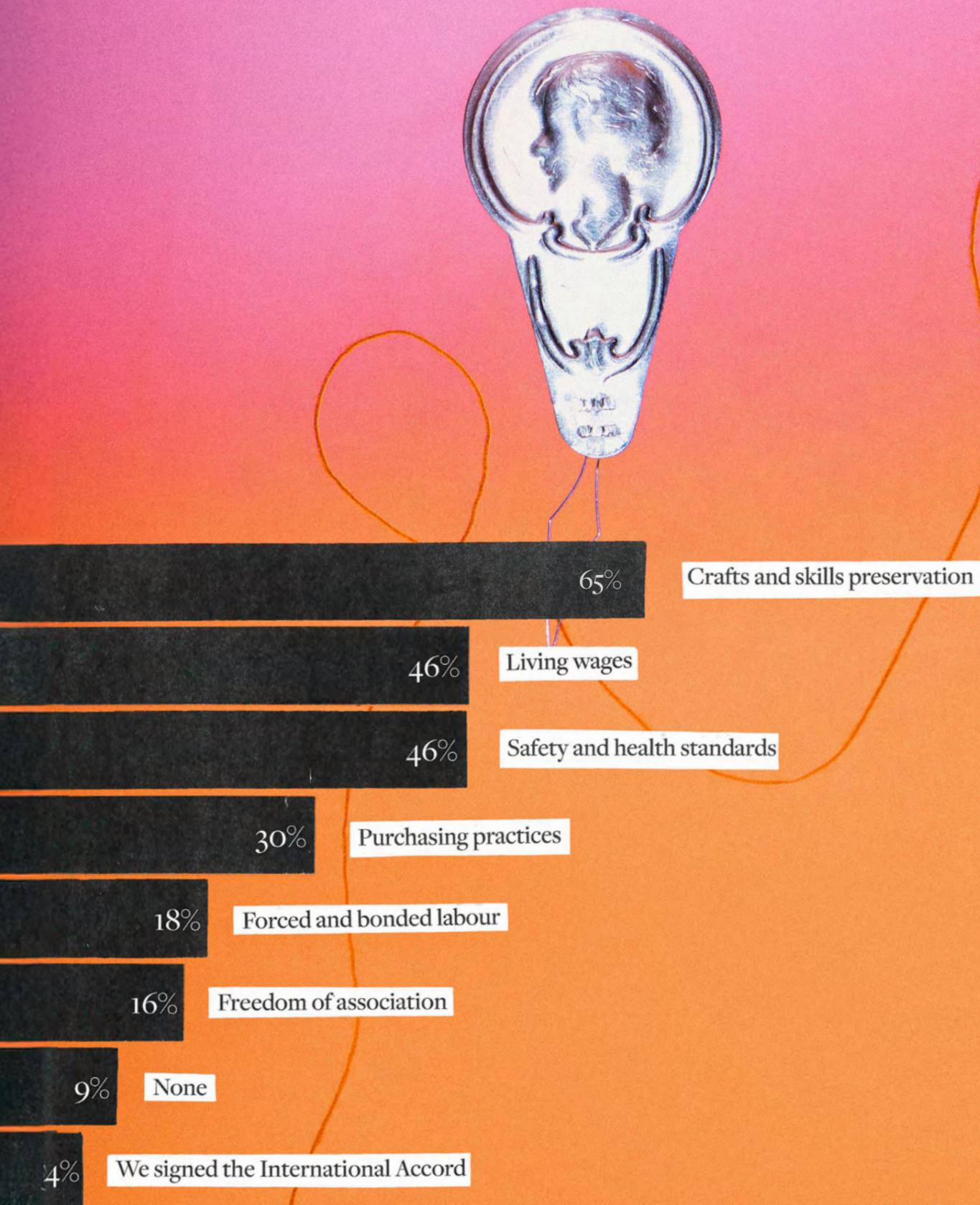
**Reet Aus**  
Head Designer &  
Senior Researcher,  
Estonian Academy of Arts, Estonia

“The next step is industrial upcycling and making new products out of existing materials. Anything left should be recycled, which is possible for anyone to handle. Waste-free production really is technically there are just few good examples out there.”

**Katie O’Riordan**  
Co-founder & CEO,  
Kinset, Ireland

“Incorporating recycled fibers into creative fashion items faces challenges due to availability and compatibility with design aesthetics. While ecodesign requirements and EPR policies push for more recycled content, overcoming these obstacles requires innovation and collaboration across the supply chain. Investment in R&D, technology, and policy incentives are necessary to drive changes across the entire supply chain, including enhancing the availability of recycled fibers in textiles.”





91%

of companies **address one or more of the social sustainability aspects** surveyed, especially the preservation of Crafts and Skills, Living wages, and Safety and Health standards.

### The Growing Importance of Social Design

Social design is increasingly recognized as a vital component of sustainability in the fashion industry. 91% of companies address one or more of the social sustainability aspects surveyed, with a particular focus on preserving crafts and skills, ensuring living wages, and maintaining safety and health standards. However, despite this widespread commitment, only 27% of companies actually measure their own organization’s social sustainability impact.

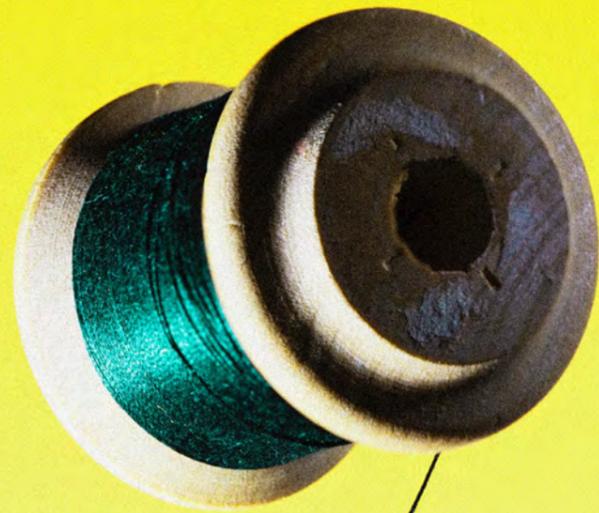
This gap highlights the need for more comprehensive and systematic approaches to assessing and enhancing the social contributions of fashion brands. By integrating social design into its core practices and improving impact measurement, the industry can better support communities, safeguard workers’ rights, and contribute to a more equitable and responsible fashion ecosystem.

27%

only 27% **measures their own social sustainability impact.**

### Focus areas addressed for social sustainability

Q22. What are the most important social sustainability aspects addressed by your organisation?



Irina Tosheva | Owner and fashion designer | Atelier Irina Tosheva, North Macedonia

**“It’s challenging for my brand to source fabrics with verifiable sustainability credentials. Even locally sourced materials often lack credentials, making it difficult to confirm their origins and sustainability standards.”**

### What’s the holdup?



European fashion brands cite regulatory challenges as well as cost and accessibility issues as the main barriers to increasing their investment in sustainability practices. The challenges mentioned are encountered by companies of all sizes, ranging from small businesses to global brands.

Natalia Särmäkari  
Postdoctoral researcher,  
Aalto University, Finland

“The prices and minimums have to come down because SMEs can’t afford the materials provided by textile recycling companies at the moment.”

Anonymous survey  
respondent  
Belgium

“Certifications and regulations cost money and time.”

Anonymous survey  
respondent  
Spain

“The overhead of endless regulation.”

25% Too early to publish in this stage

15% There are no sustainability commitments at the moment

10% We want to keep these commitments internally

6% We annually report our GHG emissions

17% Via (a) press release(s)

20% We regularly publish data on our sustainability commitments

23% Via a manifesto

### Communicating Sustainability Efforts

In line with consumers' growing awareness of sustainability, it has become commonplace among European fashion brands to communicate their sustainability efforts and perspectives to the public.

In our survey, one in two, 50%, confirmed having made public commitments to sustainability practices through various media, using platforms like manifestos, data publications, or press releases. However, some brands choose not to disclose their commitments, citing reasons such as being too early in their sustainability transition to publicize them (25%) or a desire to keep them internal (10%).

# 50%

**confirmed having made public commitments to sustainability practices** through various media, using platforms like manifestos, data publications, or press releases.

### Why some brands choose not to communicate their commitments

Q14. Has your organisation made its commitments on environmental sustainability public?

SEE PAGE 50 ←

### How brands communicate sustainability commitments

Q14. Has your organisation made its commitments on environmental sustainability public?

→ SEE PAGE 51



# Chapter 3

## DIRECTIVES AND REGULATIONS

### The Influence of EU Directives on Fashion

The European Union’s regulatory framework is evolving rapidly, with significant implications for the fashion industry. At the forefront is the upcoming Ecodesign for Sustainable Products Regulation (ESPR), a key component of the European Green Deal and the Circular Economy Action Plan. This regulation will push companies to innovate and redesign their products to meet the new sustainability standards.

### About ESPR

The Ecodesign for Sustainable Products Regulation (ESPR) was proposed in March 2022 and approved and entered into force on July 18, 2024 by the European Commission. Its overarching goal is to reduce the environmental impact of products throughout their lifecycle, to extend their lifespan and to encourage resources efficiently. By emphasizing circular economy principles, the ESPR aims to encourage the creation of products that are more durable and easier to repair, reuse, and recycle. It’s expected to impact the fashion industry’s environmental footprint, which is responsible for nearly 10% of all human-made carbon emissions.

**52%**

**of our surveyed organisations are familiar with the ESPR.**

While the ESPR represents a significant step towards sustainable practices, only 52% of our surveyed organisations are currently familiar with it, revealing a gap in awareness that could hinder its implementation.



### Challenges and Concerns with ESPR

To gain a comprehensive understanding of how the upcoming ESPR regulation may impact European fashion brands, we questioned the respondents about their concerns and challenges in seven different areas: durability, reusability, recycling, reparability, fibre-to-fibre recycling, the ban on the destruction of unsold/returned goods, and microplastics.

#### Durability

Challenge : Durability is viewed as a critical issue, but it is also challenging to measure due to the complexity and cost of technical assessments.

**“Durability is about understanding the relationship between the user, the product, and the brand. Seasonal repairs, for instance, can add value and deepen that connection.” (quote, edited)**

**Borre Akkersdijk Founder**

**Namesake by Borre, The Netherlands**

**Anonymous survey respondent Sweden**

“Implementing standards is key, but they must consider specificities such as delicate garments.”

#### Reusability

Challenge : The feasibility of reusability hinges on developing new business models and assessing materials based on product type amidst legislative inconsistencies.

**Anonymous survey respondent Latvia**

“Reusability of the materials should be evaluated based on the product type and material.”

Anonymous survey respondent  
Bulgaria

„Recycling infrastructures differ a lot from one country to another.“

### Recycling

Challenge: Recycling faces technological and logistic obstacles, with the need for improved infrastructure and clear definitions to distinguish between recyclable and non-recyclable materials.

“While ESPR policies push for more recycled content, overcoming these obstacles requires innovation and collaboration across the supply chain. Investment in R&D, technology, and policy incentives are necessary to drive changes.”

Katie O’Riordan CEO & Co-founder Kinset, Ireland

Anonymous survey respondent  
Finland

“There are just not enough people who know how to repair.”

### Reparability

Challenge: Reparability is impacted by the cost and availability of skilled labour and the need for manufacturers to take responsibility within warranty periods.

Anonymous survey respondent  
France

“Fiber-to-fiber recovery is not easy and has poor results in terms of quality and effectiveness.”

### Fibre-to-Fibre

Challenge : Fibre-to-fibre recycling is challenging due to current recycling technology, decreasing material quality, technological limitations, and the cost-effectiveness of recycling processes.



Andre Lhamas



Head of Business Development

Platform E, Portugal

“With this upcoming regulation and changing consumer demands, I think we’ll see plenty of initiatives in terms of repurposing and repairing material.”

Anonymous survey  
respondent  
Iceland

### Ban on Destruction of Unsold or Returned Goods

Challenge: ban on destruction of unsold or returned goods. Respondents generally showed strong support for prohibiting the destruction of goods. Few concerns were raised about upholding the ban.

"No concerns. Love it!"

Anonymous survey  
respondent  
Austria

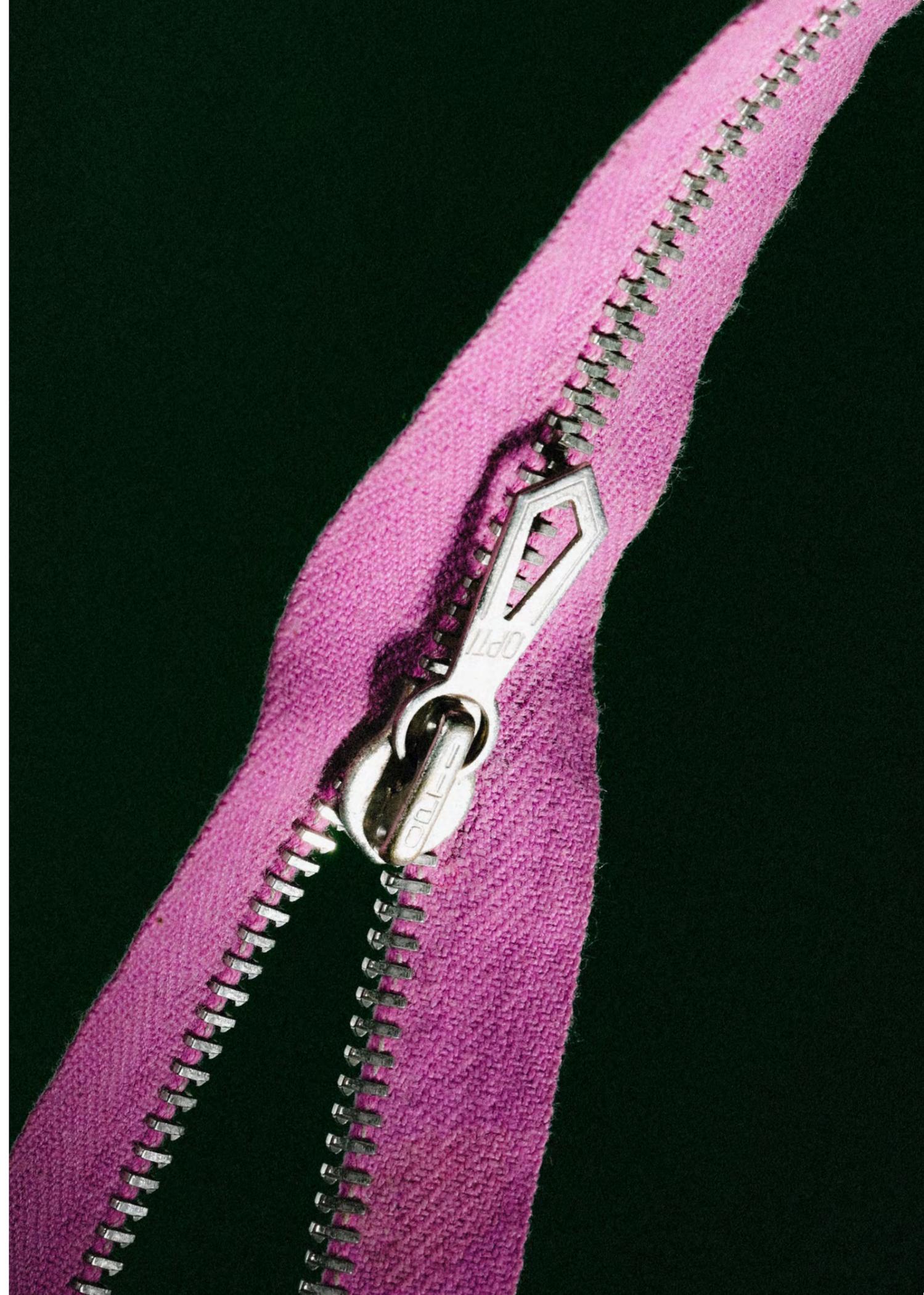
"(We are concerned about the)  
extended reporting obligation."

Anonymous survey  
respondent  
Denmark

### Addressing Microplastics

Challenge: One significant focus of the ESPR is the reduction of microplastics, which pose a severe environmental threat. Understanding the sources and impacts of microplastics is crucial for developing effective mitigation strategies. The fashion industry must invest in research and innovation to minimize the release of microplastics from textiles, including advancements in fiber technology and waste management practices. Addressing this issue requires a coordinated approach involving industry stakeholders, policymakers, and researchers.

"There need to be clear guidelines. Reusing poly materials still sheds microplastics, so how do we deal with them? Even if synthetics were banned today, we have enough poly materials to last generations, so while I am in favour of the strategy, I wonder how this will be dealt with."



Anonymous Danish Fashion Brand

**“We strongly believe that there is a need for legislation that brings direct financial incentives to reduce fashion’s footprint. If we are to achieve change on a large scale, we need a level playing field where businesses are affected more directly than now.”**

## Regulatory Support and Industry Adaptation



For the ESPR to drive meaningful change, regulatory support must incentivise companies to adopt sustainable practices and invest in research and development. Clear, actionable guidelines and support mechanisms are essential to help the fashion industry meet new regulatory standards and foster a culture of sustainability. Ensuring that regulations are flexible and supportive will enable companies of all sizes to adapt and thrive in a more sustainable future.

The effectiveness of the ESPR will crucially depend on clear guidelines and practical support for companies, as well as on the commitment and effort of industry representatives in the process of setting the delegated acts. Effective implementation requires a proactive dialogue and partnership between the European Commission and industry stakeholders. This dialogue is crucial for ensuring that regulations are aligned with the industry’s realities and challenges, and will be translated in clear guidelines and manuals.

**HUGO BOSS AG**  
Germany

“To ensure effective adoption, any EU legislation promoting sustainable practices should include clear guidance and a phased implementation, as well as technical and financial assistance for the industry... As a global player, we also advocate for harmonization across regions and would wish for more international standards that go beyond the EU.”

**Katie O’Riordan**  
Co-founder & CEO,  
Kinset, Ireland

“I believe that EFA’s advocacy for a holistic approach to sustainability in fashion, considering the emotional value of products and promoting business models that reduce volumes, is crucial for fostering a more sustainable industry. Preserving creativity and craftsmanship while ensuring competitiveness is essential for the fashion sector’s long-term viability.”

**Dace Akule**  
Expert in sustainability  
and textiles, Green Liberty,  
Latvia

“EU policymakers should take into account the local-global nature of production and consumption of textile products. Because products circulate across borders, waste management systems are often national or regional, and many post-consumption textile products from the EU are exported to third world countries.”



**Federico Brugnoli**  
CEO, Spin360, Italy

“The role of associations should also involve accompanying companies in implementing action and ensuring compliance.”

**Irina Tosheva**  
Owner & Fashion Designer, Atelier Irina Tosheva, North Macedonia

“To combat overproduction, the EU could offer tax incentives or subsidies to business that adopt made to order models. To support small artisans and preserve cultural heritage, the EU could provide grants or tax breaks to small fashion houses and artisan cooperatives.”

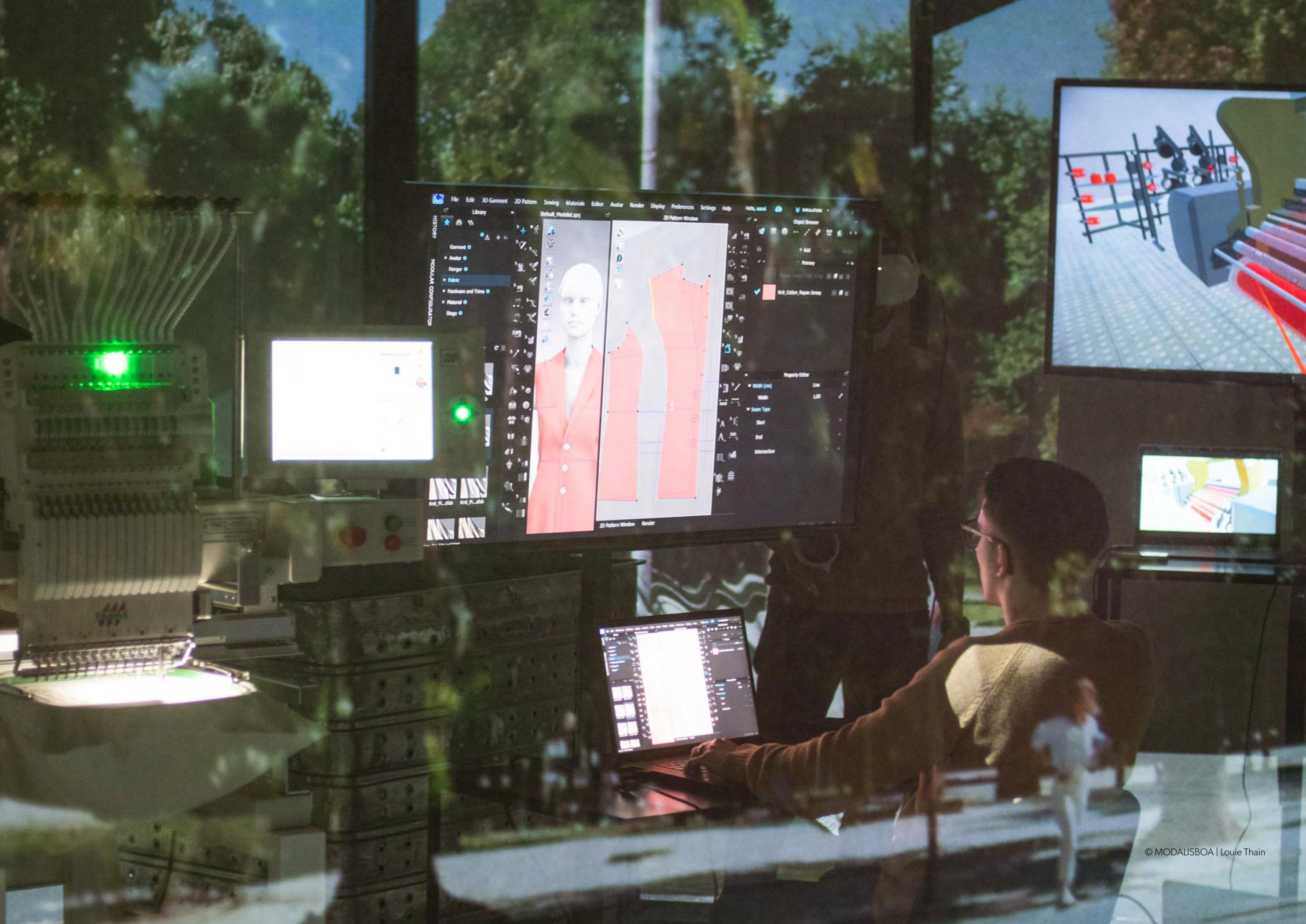
**Réka Szentesi**  
Fashion expert and researcher, Hungary

“A sustainable transition for Hungarian brands is very difficult without financial and professional support. Interpreting and implementing EU legislation requires huge resources. For this reason, I do not believe that small brands will or should be the change agents.”  
(edited for clarity and brevity)



Van de Velde group, Belgium

**“Complexity is the challenge. With a simple manual for large and small companies alike, and a simple scenario or roadmap explaining step-by-step how to comply with different laws, Europe can make a big difference. Right now, we spend a lot of time deciphering exactly what to do.”**



# Chapter 4

## DIGITIZATION

# 46%

of organizations **say that technology and innovation are key drivers** for their business.

### From Sketch to Screen: Digitization Transforms the Fashion Industry

Digitization is reshaping the fashion industry, offering new opportunities for efficiency, sustainability, and innovation. Technologies such as artificial intelligence (AI), blockchain, and the metaverse are transforming various aspects of fashion, from design and production to marketing and sales. However, some technologies still need to be more widespread across industry players, and the majority of our surveyed organizations report a lack of tech knowledge.

46% of organizations say that technology and innovation are key drivers for their fashion-related business.

**Michele Casucci**  
GM & Founder,  
Certilogo, Italy



“The fashion industry can adapt to digitalization while ensuring creativity and sustainability by collaborating with expert partners who possess the skills to effectively translate the tactile experience of physical products into the digital realm. The focus should be on applying intelligence and expertise to the technology used rather than simply relying on the technology itself.”

**Natalia Särmäkari**  
Postdoctoral researcher,  
Aalto University, Finland

“Digitalization is good when it improves the quality of life or the operations of companies as well as the working conditions of the employees. But I believe creativity, ethical and aesthetic assessment, and responsibility must all remain human.”

### Reasons for tech adoption & investment

Q44. What is the key driver to test/implement/invest in technology?

→ SEE PAGE 67

Sustainability

63%

Efficiency

56%

Cost reduction

42%

Pioneering image positioning

26%

Speed

22%

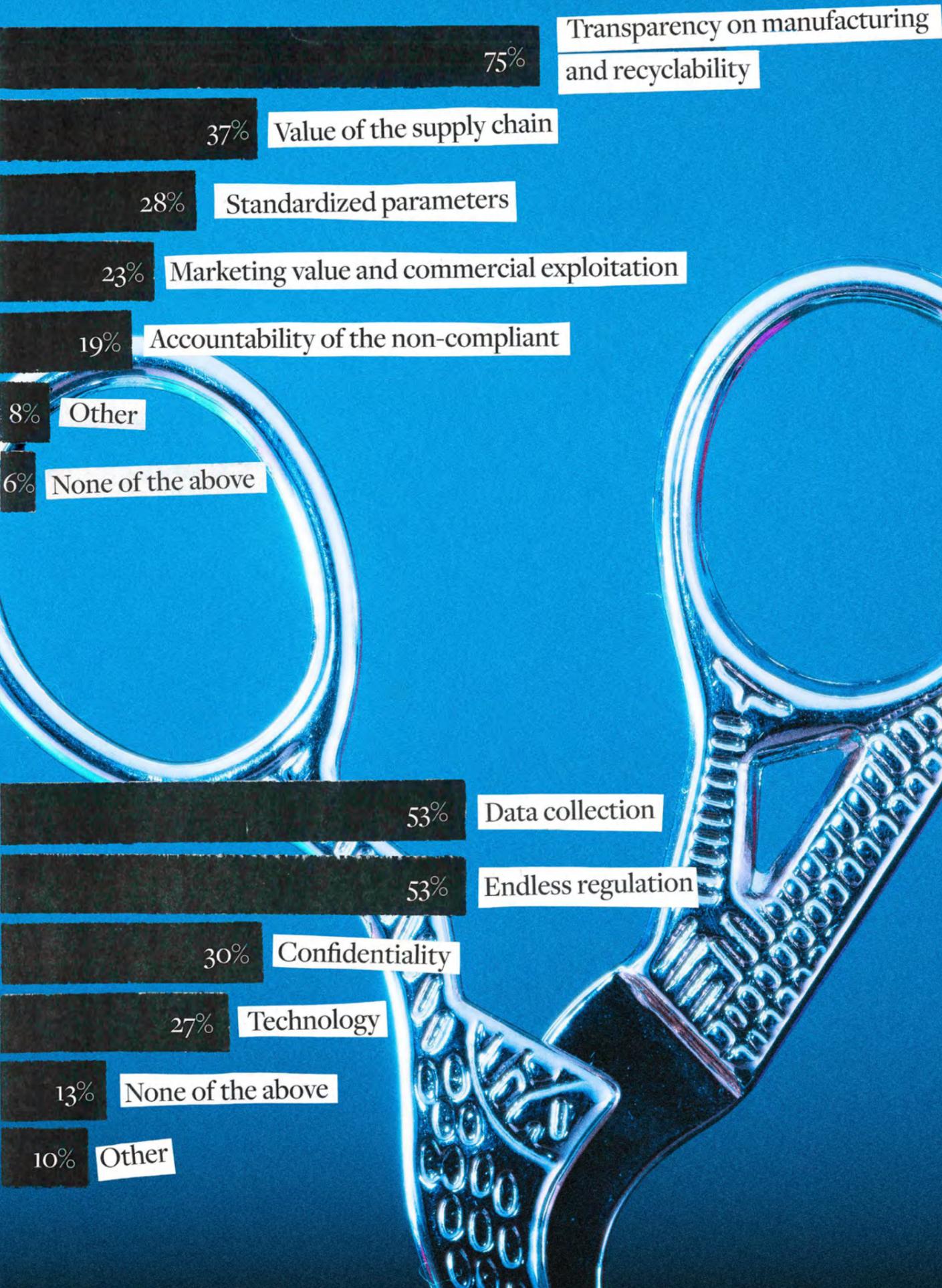
None of the above

8%

Other

6%





### Relevant DPP Aspects for Organizations

Q29. What is the most relevant aspect of the DPP (digital product passport) for your business?

44%

of respondents **are familiar with the Digital Product Passport.**

### The Role of the Digital Product Passport

A notable technological advancement is the Digital Product Passport (DPP), which aims to enhance transparency and recyclability in product manufacturing. 44% of respondents are familiar or very familiar with the upcoming Digital Product Passport, which is expected to support sustainable production and consumption by providing detailed information about a product's lifecycle.

While 76% believe transparency in manufacturing and recyclability is the most relevant aspect of the Digital Product Passport, 53% are still concerned with data collection and the prospects of endless regulation in connection with the DPP. Therefore it is highly important to focus on improving buyer-supplier relationships within the supply chain.

Dace Akule of Green Liberty sees the DPP as having the potential to promote sustainable production and consumption of textile products and facilitate a smoother transition towards a circular economy. This would provide greater visibility not only in terms of product origins but also environmental impacts.

76%

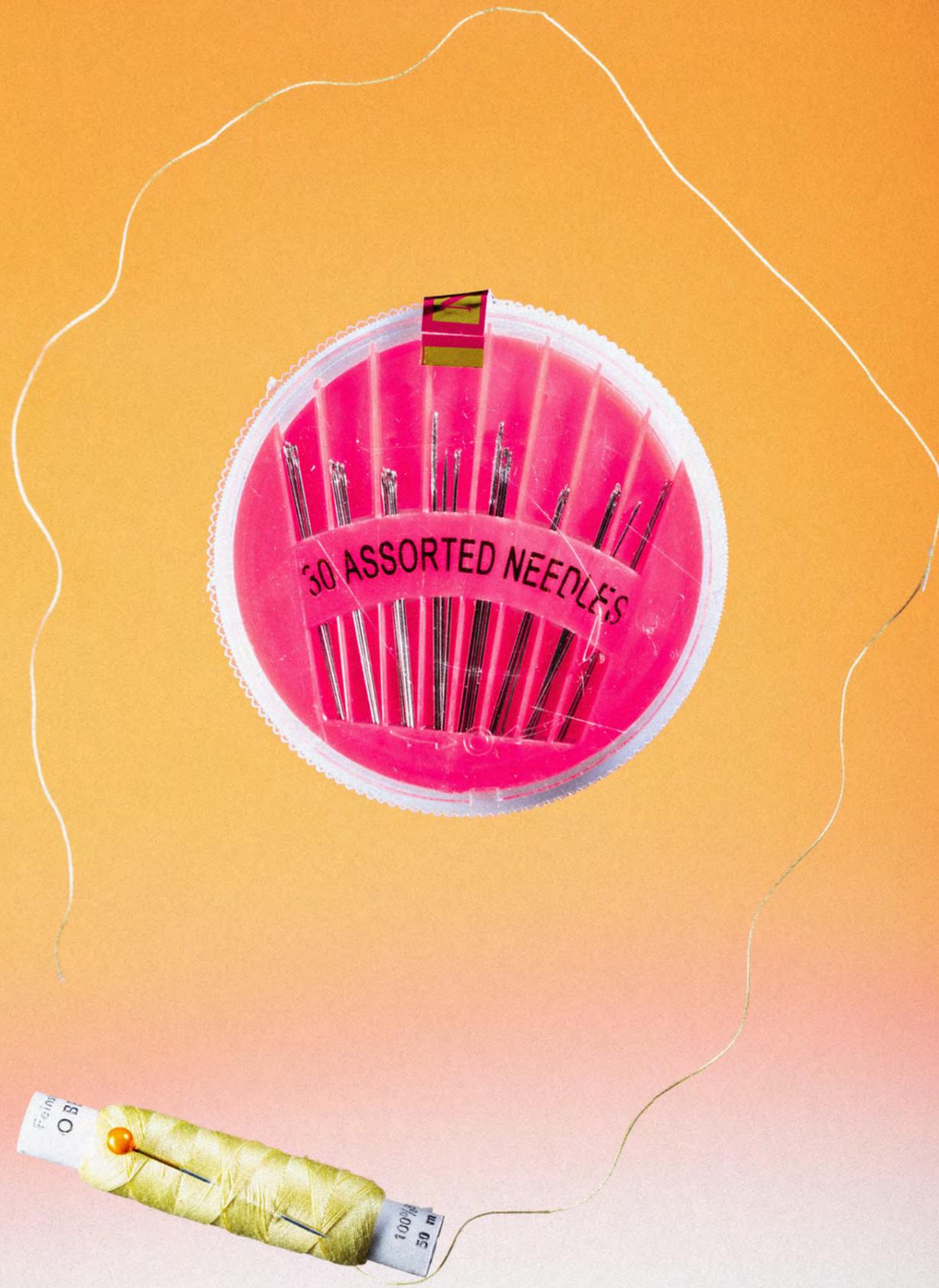
**believe transparency in manufacturing and recyclability** is the most relevant aspect of the Digital Product Passport.

53%

**are still concerned** about data collection and the prospects of **endless regulation in connection with the DPP.**

### Concerns regarding DPP

Q18. What measures is your organisation applying for the extension of the life span of your products?



**Reet Aus**  
Senior Researcher  
Estonian Academy of Arts,  
Estonia

“There are several problems with the DPP because brands are not willing or capable of providing production information. Many aren’t even familiar with LCA and don’t have a transparent understanding of their supply chain.”

**Van de Velde Group**  
Belgium

“DDP has for sure added value. We are not solving the problem by entering all transparency steps in a digital product passport. Those who want to circumvent it, will do so anyway. Moreover, the complexity doesn’t make it evident to implement.”

**Michele Casucci**  
GM and Founder,  
Certilogo, Italy

“DPPs can be a catalyst for positive change in the industry and generate long term value for brands. We believe the Digital Product Passport represents an important opportunity to unlock the next generation of business services and a new wave of economic value.”



### Adopting Emerging Technologies

With new technologies come new opportunities—also for fashion businesses. Our comprehensive pool of industry respondents points to attractive benefits across several areas, including efficiency, sustainability, and cost reductions. Artificial Intelligence (AI) solutions or automatic learning are being used by 18% of organizations in the design process or client experience, while 10% make use of the metaverse.

**Andre Lhamas**  
Head of Business Development,  
Platform E, Portugal

“AI will fully disrupt the industry, so being able to make all of these processes efficient, like connecting POS data and knowing exactly what is being purchased where and by whom and having this information available in real-time for manufacturers will be a game-changer.”

**HUGO BOSS AG**  
Germany

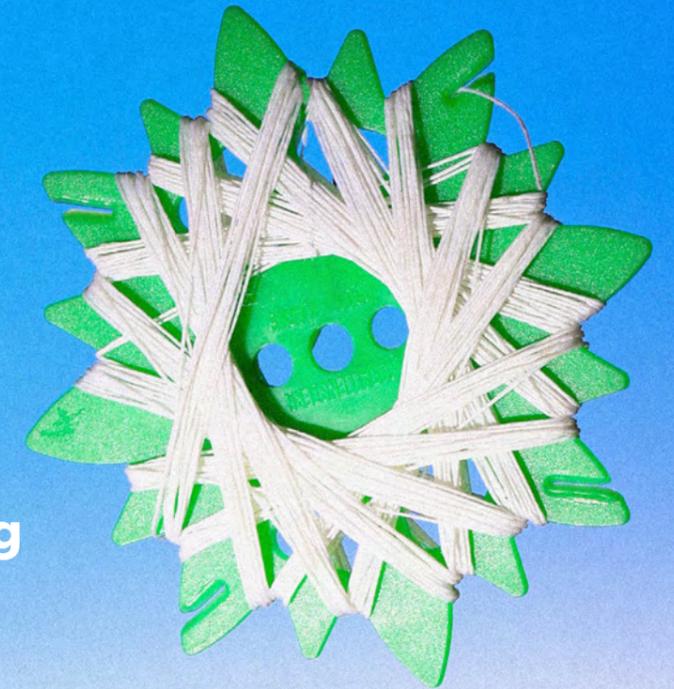
“We fully acknowledge the pivotal role that new technologies like AI, the metaverse, blockchain, NFTs, and Web3 play in advancing the fashion industry. However, we also recognize the uncertainty in the EU regarding how policies will shape up, which makes it challenging for companies to adapt in an unclear legislative environment. We hope to see the development of agile processes and competitive conditions that foster innovation while maintaining flexibility and creativity”

**Irina Tosheva**  
Owner & Fashion Designer,  
Atelier Irina Tosheva,  
North Macedonia

“The fashion industry must prioritize comprehensive education and training to effectively embrace digitalization, including programs that demystify these technologies and demonstrate their potential to enhance both creative outcomes and sustainability. For example, training sessions on using AI to optimize sustainable material usage or blockchain to increase supply chain transparency could be highly beneficial.”

61%

are interested in learning more about Blockchain, Web3, and NFTs.





## Overcoming Barriers to Tech Adoption

Despite the potential of new technologies, the fashion industry faces barriers to widespread adoption. Significant challenges include high technology costs, lack of technical expertise, and uncertainty about ROI. Addressing these barriers requires a collaborative approach, with industry stakeholders sharing knowledge, resources, and best practices. Industry associations, technology providers, and educational institutions can play a crucial role in facilitating the adoption of new technologies and driving innovation in the sector.

## The tech that makes a better fashion business

New technologies are already making a positive impact on European fashion companies. We asked our survey respondents to list the innovations they have adopted to boost their business.

### Technology Highlights

#### E-Commerce

Responses highlighted the importance of digital platforms and e-commerce solutions in reaching customers, managing operations online, and capitalizing on the digital marketplace's growth. A strategic balance between wholesale, bricks-and-mortar retail and e-commerce is a hallmark of fashion brands thriving in the current climate.

#### Innovative Materials & Processes

Several innovative materials and processes have entered the market recently, increasing competition among textile companies.

Responses focused on technologies that enable sustainable practices, including recycling innovations, the development of eco-friendly materials, and processes that reduce environmental impact.

#### Social Media

Several respondents to the Status of European Fashion survey emphasized the importance of using digital marketing and social media to enhance brand visibility, customer engagement, and marketing strategies in the digital era.

#### Digital design and production tech

These technologies streamline the design and production process, such as 3D modelling and digital pattern making, and are accelerators for efficiency and innovation.

#### Emerging technologies

A number of respondents also mentioned how emerging technologies like AI, blockchain, AR, and VR offer new capabilities.





# Chapter 5

## EDUCATION & RESEARCH

### Educate to Innovate: Shaping the Next Generation of European Fashion

The European fashion industry- a hub of creativity and innovation, faces a pressing challenge in talent development. Most industry respondents report a shortage of in-house skills, highlighting the need for enhanced educational frameworks and collaborations. Many have engaged with academic or research institutions to spearhead product development. Moreover, there is an increasing demand for expertise in sustainability and circularity, as these skills are highly valued among employees.

**72%**

of respondents **see a lack of certain skills** that could be solved through training programs

#### Skills and Training Needs

72% of respondents see a lack of specific skills that could be resolved through training programs. When asked to list three desired skills or knowledge attributes future employees should be taught, nearly 400 open-ended responses resulted across six main categories.

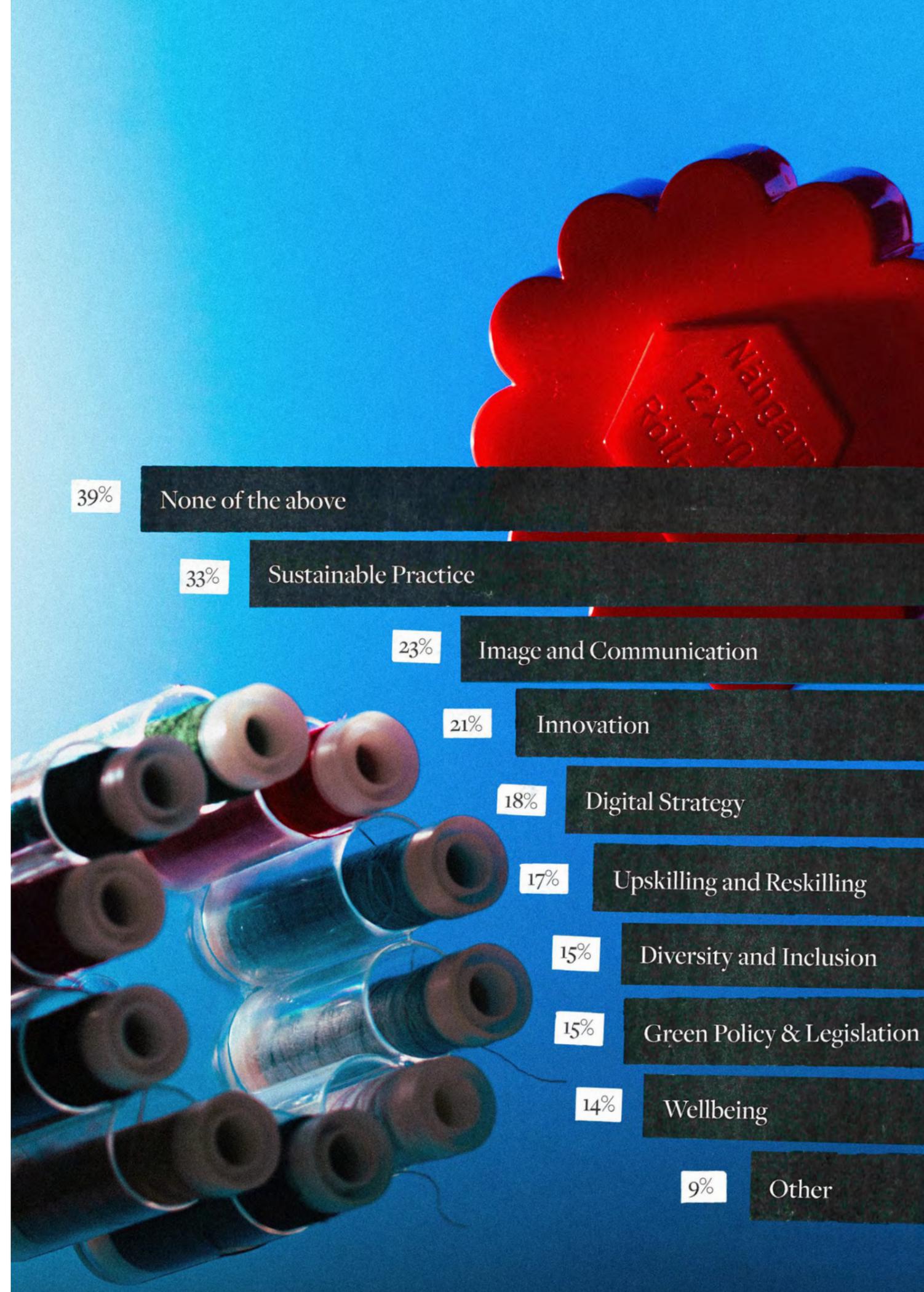
**39%**

**do not offer in-house training** for employees in the listed areas.

The most sought-after skills included expertise in sustainability and circularity, design and creativity, digital and marketing skills, business management, personal development, and technical skills. Despite the high demand, 39% of companies do not provide in-house training in these areas for their employees. Among those who do, Sustainable Practice is the most-offered training topic, followed by Image and Communication, and Digital Strategy. To address this issue, companies must invest in training programs and partnerships with educational institutions to ensure their workforce is equipped with the necessary skills and knowledge.

#### Current focus areas of trainings

Q54. Do you currently offer inhouse training to employees in the following areas?



41%

of companies have **previously worked with educational or research institutes** to develop products or services



with

69%

**planning or hoping to work with educational or research institutes on their business development.**



**Andrée-Anne Lemieux**  
Sustainability Director,  
Institut Français de la  
Mode, France

**Collaborations with Educational Institutions**

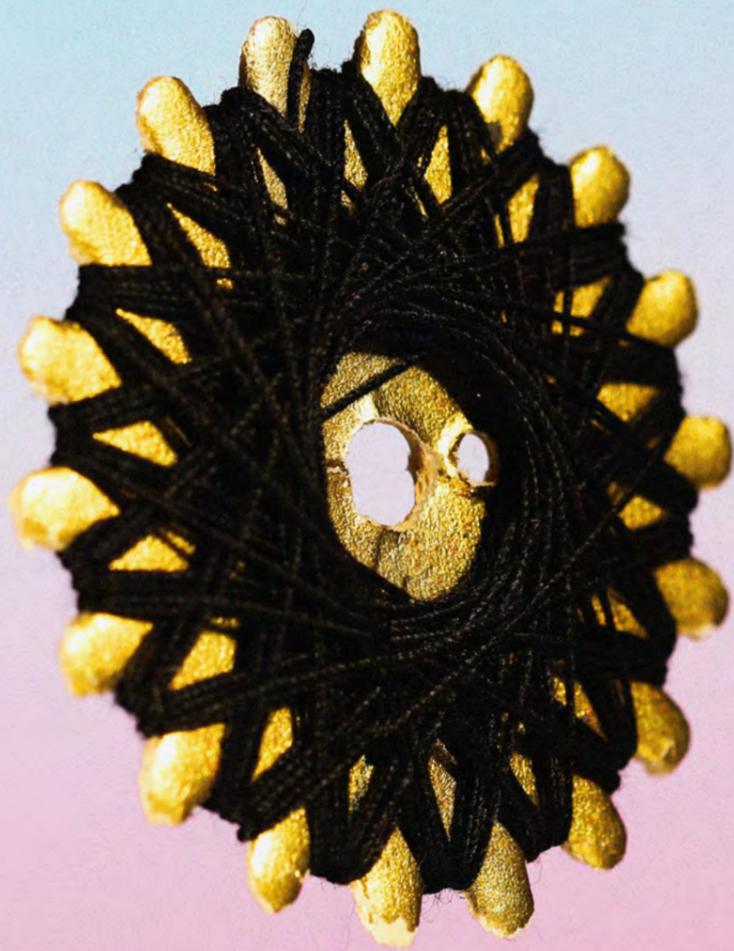
Collaborations between industry and educational institutions are essential for driving innovation and advancing sustainable practices. Approximately 41% of companies have previously worked with educational or research institutes to develop products or services, with 69% planning or hoping to work with educational or research institutes on their business development.

Industry experts stress the need for accessible and flexible training programs to meet the evolving needs of the fashion industry.

“Education is a question of change management where policymakers can support in providing open-source training. The content must be adapted to different types of companies in terms of size, supply chain organization, commercialization, etc., in order to create a real impact.”

**Natalia Särmäkari**  
Postdoctoral researcher,  
Aalto University, Finland

“Somehow, free training should be provided for companies. Certainly, the new legislation has to be taught to the companies in ways that are accessible and applicable.”



Andre Lhamas

Head of Business Development

Platform E, Portugal

**“We struggle to find the right profiles. From an educational standpoint, universities are probably a lot slower to react than the market evolves. This just underlines the necessity of life-long learning.”**

## Addressing the Talent Gap

Addressing the talent gap in the fashion industry is a critical challenge, especially as the industry evolves rapidly due to technological advancements, changing consumer behaviours, and increased emphasis on sustainability. The shortage of skilled workers is a growing concern, with universities often striving to keep pace with market demands.

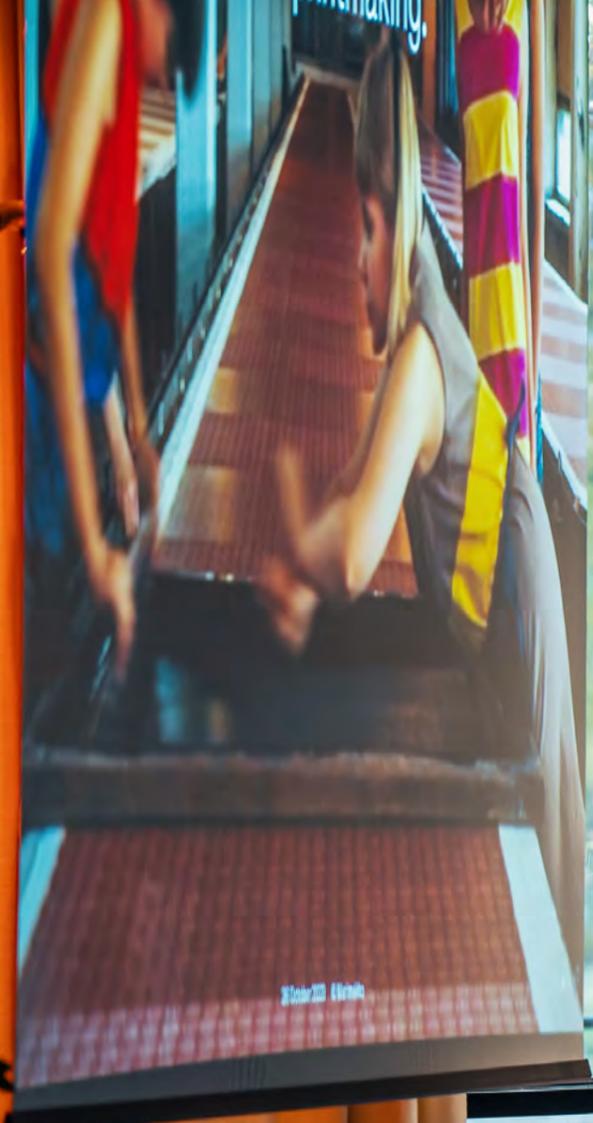
**Jarkko Kallio**  
CEO & Co-founder,  
Frenn Helsinki Oy, Finland



“Company representatives should be involved in preparing all new legislation so that its implementation does not become too difficult or expensive. Training with practical examples is really needed. Otherwise, we risk the implementation will either not be done or underutilized. Too many reforms and demands at the same time pose a real challenge.”

**Linda Raituma**  
Creative Director  
and Founder,  
Member of The Board,  
Paade Mode, Latvia

“There is a lack of knowledge (in our industry), and no centralized source to find it. You can learn and grow on your own, but industry seminars and systematic support would be very useful.”



# EFA MANIFESTO OF RECOMMENDATIONS

As the voice of creative-driven designers and brands, SMEs and large companies, European Fashion Alliance aims to empower a prosperous European fashion ecosystem. We aim to have a strong common voice advocating for and accelerating the transition of European fashion towards a more sustainable, innovative, inclusive and creative future.

Our industry is driven by creative excellence and delivering high quality, useful and aesthetic products, respectfully produced for nature and humanity. The European creative driven fashion industry is a substantial part of the entire European fashion ecosystem experimenting with and developing new designs, new business models and eco-friendly solutions.

On the occasion of the 2023 European Fashion Alliance conference and the release of the first results from the 2024 Status of the European Fashion Industry survey, we will focus on the needs and challenges faced by industry stakeholders. We aim to deliver a set of recommendations addressing the research, work, and regulatory frameworks currently being developed at the European level.

We firmly believe in the collaborative power of industry stakeholders to ensure a sustainable future for the fashion sector both within and beyond European borders. By representing more than 10,000 SMEs and large companies, we amplify the collective voice of the industry.

**This document contains a set of recommendations, translating the needs of the creative-driven part of the European fashion industry towards European decision-makers.**

## A) VALUE EUROPEAN CREATIVITY AND POWER

### 1. Support the European design and manufacturing ecosystem

As a worldwide leader, European creative fashion represents a crucial European strength, asset and potential. It is embodied by the most emblematic and influential global brands, alongside successful midsize brands and highly talented emerging talents and brands. This sector forms the backbone of European manufacturing employment across textiles, clothing, leather goods, footwear, and other accessories industries. The European Fashion Weeks are also worldwide leaders and vehicles of a high economic and cultural attractiveness.

In this perspective, the Creative Fashion sector aims at small and controlled volumes of products consumers praise and value.

It lays at the opposite of the excessive and uncontrolled volumes occurring in the fashion industry, which poses significant ecological risks.

It is essential to raise awareness among all stakeholders, including fashion brands, manufacturers, policymakers and consumers, about the huge negative consequences of overproduction and the importance of adopting more sustainable and responsible consumption practices.

**EFA calls the strong, engaged and structural role of creativity-driven fashion to be fully recognized by European public authorities. EFA also emphasizes the role that Creative Fashion can reinforce and contribute to in the perspective of the New European Bauhaus.**

## 2. Promote sustainability and circularity as a component of creativity rather than at its expense

Sustainability underpins all aspects of creative fashion, from the creative process to the commercial policies of its actors, which are not tailored to encourage over-consumption but prioritize thoughtful production and long-lasting products. Most creative-driven fashion products are designed to last through emotional and sensorial factors, and also with possibilities of reuse, repair or remanufacturing. It is within the nature of Creative fashion brands and houses to combine creativity and innovation, to promote the circularity of their products, whether developing upcycling techniques, high-quality recycling, innovative materials, or responsible management of unsold goods to preserve as much material as possible, without waste.

**EFA calls on the European commission to consider, and even draw inspiration from these specificities of the creativity-driven segment of the fashion industry when considering horizontal measures for the textile industry at large. Implementing sustainability or circularity requirements in a simplistic, one-size-fits-all way could lead to the detriment of the creativity and virtuous practices that define the sector. Tailored approaches are essential to support both innovation and sustainability in creative fashion.**

## B) MEASURING SUSTAINABILITY IN A FAIR WAY

### 3. Establishing a truthful footprint data base for environmental impacts

Despite the efforts of dedicated fashion companies and brands, the European Textile Footprint Database remains unsatisfactory and far from meeting its intended goals. Beyond the imperious necessary to extend granularity, numerous ambiguities subsist among which:

- Insufficient granularity: The weak degree of granularity of the database, which obscures diversity of the industry and unfairly penalizes high-quality products.
- Biased comparisons : The fact that the comparative impacts of natural and synthetic fibers are generally at the benefit of the latter, which can be obviously challenged.
- Data inconsistencies: Frequent and major differences with regards to the impact, for instance, of a given fabric between two databases.
- High standard deviations: The high degree of constant standard deviations, which questions the current evaluation of average values.
- The insufficient consideration of textile innovations.

There cannot be a viable environmental policy in such a harmful framework. Endorsing any private company , whatever its competences are, is far from being enough.

**EFA calls upon the European Public Authorities to address these crucial topics and challenge public policy. This effort should involve mobilizing all stakeholders in the fashion sector—brands, manufacturers, and innovators—alongside academia and scientific institutions, ensuring that the expertise and resources needed to reform the database are fully leveraged.**

## 04

## 4. Address durability with a holistic approach

Current Life Cycle Analysis (LCA) focuses on measuring physical durability, strictly concentrating on the functional aspects of Fashion, where fashion by its nature relies on non-functional factors. This creates a clear contradiction between the current LCA durability approach and the practices of designer brands and environmentally committed entrepreneurs who are prioritizing physical and emotional durability. The European Parliament and the European Commission have emphasized the value of emotional durability and more generally, extrinsic durability.

**Beyond the attempts and efforts deployed within the Product Environmental Footprint (PEF) context and without denying the importance of physical durability, EFA calls upon the European Public Authorities to set up a strong initiative, mobilizing in particular academic/scientific communities, for reaching a fair measuring of the multifactorial fundamental factors of extrinsic durability.**

## 05

## 5. Include social aspects in textile digital labelling

EFA fully supports the objectives underpinning environmental labelling, designed to help consumers make more sustainable purchasing decisions and, indirectly, to help increase industry transparency and reduce the environmental impact of products.

However, social considerations are equally significant and should be addressed with the same rigor as environmental aspects. By highlighting aspects such as improved production conditions, fair remuneration, diversity, and inclusivity alongside environmental considerations, the creative fashion industry can demonstrate its commitment to ethical and sustainable practices and contribute to steering the global industry towards them.

**EFA advocates for the inclusion of information on social aspects in textile and fashion environmental labelling.**

## C) GIVING ACCURATE AND FAIR INFORMATION TO CONSUMERS

06

### 6. Establishing a fair labelling

EFA recognizes the importance of providing consumers with accurate, meaningful, and well-structured information about the sustainability of fashion products. An intense collective work has been achieved in this field. Still, comparative visual labelling systems do not make any sense under current circumstances, since it is equivalent to make announcements standing on the top of a sandcastle. Comparison in this context is not reasonable. Labels should provide absolute values, clearly explaining how these were calculated, and not the relative values leading to potentially biased consumer decisions. Besides, social performance is inseparable from environmental performance for a necessary two-fold understanding of sustainability.

It is also important to inform consumers about the dangers of overconsumption and to empower them to make informed, responsible purchasing decisions.

**EFA calls on a global, pedagogical and well-founded labelling to be given to consumers for each product and to avoid artificial comparisons.**

07

### 7. Implementing the Digital Passport Product in a right way

The Digital Passport Product (DPP) will play a crucial role for consumers. Its success is conditioned by three key factors:

The first factor is linked to the necessity to standardize the constitution of rough data, which will be incorporated and countable by billions, and their structuration on platforms to be therefore set up. It is also a question to be in position to ensure the veracity of these data and the legal framework of the information ecosystem.

The second factor deals with the establishment and standardization of adequate KPI's, which will be necessary a challenge in the context of diversified and international complex value chains.

Finally, this information and KPIs will be converted into a consumer-friendly visible layout, for which a degree of standardization will also need to be determined.

**While praising the deployment of the DPP, EFA emphasizes the need to consolidate the project and its implementation in a legitimate, scientific and technical framework.**

## D) SUPPORTING THE CREATIVE FASHION ECOSYSTEM

08

### 8. Support ecodesign and circularity by developing innovation and R&D policies

Eco-design is essential to advancing sustainability in the fashion industry, but its implementation must be nuanced to avoid unintended consequences. Current practices, particularly the push for incorporating recycled materials, risk favouring synthetic fibers over natural ones, which challenges the environmental goals they aim to achieve.

At the current state of technology, most of the available fibres with recycled content come from open-loop recycling, involving synthetic fibres like polyester coming from recycled plastic bottles, which are not biodegradable and likely to release microplastics in the ocean, while most high-end fashion products prefer natural fibres that are more durable and better suited for circularity. Regulating thresholds of recycled content will admittedly have a driving force on the recycling industry but it will come with a risk of promoting mixed materials with synthetic fibres, which complicate recycling processes and hinder true circularity.

While circularity is a central factor in sustainability, further efforts should be made to overcome the current limits on the recyclability of textile products, in particular by investing in fiber-to-fiber recycling and promoting local solutions, addressing each product specificities and technical challenges as well as, more generally, the current crisis of the recycling sector.

**EFA calls on R&D and innovation initiatives promoting eco-design and respecting the freedom of creation as a central value for our sector and supporting more renewable materials, reducing waste, optimizing production processes and building better circular systems.**

09

### 9. Support the development and adaptation of creative fashion companies

The European creative-driven fashion industry is represented by a vast majority of SMEs alongside major and historic brands.

It is important that public authorities and regulations support European production and European brands, valuing the work of historic brands and at the same time issuing specific rules for SMEs and new brands. They should ensure viable conditions for their business models to thrive, including a level playing field with third-country players by ensuring effective compliance with European regulations by products imported into the EU market and an adequate protection of intellectual property rights in an offensive market, helping brands defend their creativity and innovation.

Besides, while our survey has shown unequivocal commitment to sustainability from the sector, the amount and diversity of EU regulations in this regard represent a challenge for stakeholders and SMEs in particular. Understanding and implementing these new regulatory standards requires substantial human and financial resources, whether for collecting the data needed to properly inform consumers on a variety of elements, including through the DPP, setting up reliable traceability along complex value chains, implementing internal systems for the management of and the reporting on unsold goods, managing the collection of data and their reliability, confidentiality and security, will be a heavy task and can appear as a burden. The challenges are numerous and substantial.

Finally, creative fashion brands and houses must integrate the effects and tools of the digital revolution, particularly artificial intelligence. They will be concerned by generative AI and its potential innovative and creative potential, role and the tools to be used by fashion designers and creative communities around them. They will also need to take care of the integration of digital, environmental and social policies. All this will happen at the same time. All this will happen at the same time.

**EFA calls for clear and actionable guidelines, financial support for the implementation, sufficient time for proper implementation as well as strong innovation and digital policies to enable creative fashion companies to realize this global ambitious transition, without undermining their competitiveness, economic and cultural value.**

## 10. Educate and train talents of all generations and prepare for the big transition

**10**

The fashion industry is only at the beginning of its transformation towards a more virtuous future. The natural commitment of creative fashion stakeholders in this regard, supported by public regulations, can only achieve its full potential if supported by relying on sufficient skills and expertise amongst the workforce. It is essential to address the current talent gap and skills shortage in the fashion industry, as well as anticipating a growing need for skilled professionals in these areas, especially for future generations of fashion stakeholders.

In this regard, existing or future investments in training by companies, as well as collaborations with educational institutions must be supported and developed via incentive policies and promotion programs enhancing the attractiveness of the sector.

It is also necessary to support schools dedicated to Fashion in any field, to incorporate all the features coming from the digital revolution as well as the ecological revolution, to prepare the next generation.

**EFA strongly advocates for the strengthening of the educational and training ecosystem to reinforce long-term success and the future of Creative Fashion; the success of which being conditioned by the large and diverse array of high-level scientific, technical and managerial skills, alongside creative and innovative talents, that will shape the industry.**

# EFMA EUROPEAN FASHION ALLIANCE



# MEMBERS





# IMPRINT

November 2024

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