About EDITED

The Retail Market Intelligence Platform

Retail buyers, planners and merchandisers use EDITED every day to drive higher margins, increase sales and react faster to market trends.

We track data on over 2.5 billion+ SKUs and add more than half a million per week, giving you a competitive advantage by increasing your speed to market. Our Market Intelligence Platform uses AI to optimize buying and merchandising decisions, ensuring you get your product and pricing right every time.

edited.com/demo
In retail, 2019 was dubbed the Year of Sustainability. More major players started waking up to the fashion industry’s detrimental effects on the planet and responded by prioritizing greener processes and setting goals to reduce their environmental impact.

Despite how COVID-19 has disrupted retail in 2020 and the foreseeable future, sustainability commitments are still critical across business agendas.

According to the US Cotton Trust Protocol and Economist Intelligence Unit (EIU), which surveyed 150 executives from retail businesses across Europe and the US, three in 10 companies stated that the availability of reliable data holds the key to a greater understanding of sustainability over the next decade.

This is where the EDITED Market Intelligence Platform can help. Alone, converting your entire T-shirt range to organic cotton won’t fix fashion’s sustainability issue. Neither will a one-off collaboration with a cult eco brand. Sustainability is a complex, ongoing issue with many factors at play and multiple problems that need to be addressed from both retailers and consumers.
Using real-time global data from 40+ markets, EDITED tracks the number of styles launched, discounted and sold out each day, giving retailers visibility of what products are working well. Retailers then have the power to make more informed decisions and adjust assortments accordingly, investing in only the right products at the right price at the right time. EDITED can help maximize profits and minimize the number of unsold goods adding to this global problem.

*By embracing data and AI, retailers are taking responsibility for the industry’s greener future.*

The EDITED annual Sustainability EDIT puts our data into action. This report includes analytical research on how retailers are shaping their assortment to be more sustainable over time, as well as pricing and performance metrics behind eco-friendly products.

60% of fashion and textile companies ranked sustainability as the second most important strategic objective behind improving customers’ experience.

- US Cotton Trust Protocol and Economist Intelligence Unit (EIU)
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1.0 Sustainability in 2020 and beyond

Retailing in 2020 is far from what anyone could have predicted. Despite the challenges retailers faced, environmental efforts continued to be championed. In this section, we highlight the macro themes that helped shape sustainability this year and will have a lasting impact on the industry in years to come.
According to the United Nations Alliance for Sustainable Fashion, the apparel industry accounts for 8% to 10% of the world’s greenhouse gas emissions. As coronavirus took hold, clear skies started to appear above the regions impacted the most as people were mandated to stay inside. As factories shuttered in China at the start of the year, emissions fell by nearly 25%.

We know fast fashion businesses are characterized by dropping high amounts of new styles frequently, abandoning the seasonal drop models established by more traditional retailers. Arrivals across these sectors dipped in February and March as COVID first broke out in China, where supply chains were compromised and caused retailers to cancel orders. New arrivals hit their lowest point in April when the US passed 1 million confirmed cases.

As the industry returns to some sense of normalcy, there’s signs of recovery with new products entering the market. Yet, fast fashion is still not dropping products at its regular cadence. In the US and UK combined, new product arrivals for Q3 2020 are 11% lower than in 2019.
Sustainability in 2020 and beyond

Will newness return to pre-COVID levels?

It might not. And that’s not necessarily a bad thing. The fast fashion sector is constantly under fire for creating excess items that end up on the discount racks or unsold and added to landfills.

The pandemic has presented an opportunity for retailers to focus on buying into the right products and trends instead of excess quantities, which will end up damaging margins in the long run.
1.2 Rethinking retail processes and the new consumer

COVID-19 was a catalyst for retailers to rethink and reset their traditional trade processes with many businesses calling for realignment of the fashion calendar at the start of the year. Fashion heavyweights including The BFC & CFDA, The Business of Fashion, Dries Van Noten, Tory Burch and Bergdorf Goodman all put their support behind recommending new processes for the industry to work smarter and more sustainably in open letters and manifestos including:

- Resetting the fashion calendar for designers to focus on no more than two main collections a year and shift delivery cadences closer to the intended season.
- Utilizing digital runways, presentations and showrooms to offset the cost of travel during fashion weeks.
- Working to increase sustainability throughout the supply chain and sales calendar with less unnecessary products and waste in fabrics and inventory.
- Breaking fashion’s addiction to discounting by waiting until the end of the season to reduce products.
Sustainability in 2020 and beyond

Top image: Instagram @gucci

Bottom image: rewiringfashion.org

Next slide left image: Instagram @crocs

Next slide right image: Starface

#rewiringfashion

This is a proposal for the global fashion industry, the product of ongoing conversations between a growing group of independent designers, CEOs and retail executives from around the world who have come together in this challenging time to rethink how the fashion industry could — and should — work.

Facilitated by The Business of Fashion
While these directives are spearheaded by luxury players, an industry-wide reboot will be beneficial for all market sectors to align with the values of consumer groups who are becoming more educated and committed to supporting brands that reflect their own personal values.

Fast fashion players have long tailored their products and processes to satisfy the Gen-Z consumer’s appetite for newness. However, defining events in 2020 such as the global pandemic and the spotlight on the Black Lives Matter movement has propelled younger consumers to become more conscious and more educated on social, political and environmental issues.

This has led to the rise of CARLY (Can’t Afford Real Life Yet), the community-driven Gen-Z cohort, which demands transparency from its brands and are championing positive change to prevent the industry from returning to its destructive "normal."

41% of Gen-Z say global warming is the most important issue facing the world.
- Amnesty International: The New Future of Humanity Survey
1.3 The future of runways

Pre-pandemic, Fashion Week continuously came under fire for its lack of eco-credentials as designers, buyers, models, journalists and more industry workers flew across four cities for only two seasons a year.

A recent study from the CFDA and Boston Consulting Group estimated the impact of travel during New York Fashion Week was responsible for between 37,830 and 44,520 metric tons of carbon dioxide each season. Combined with safety and social distancing measures in place, 2020 has forced the industry to reimagine what the future of Fashion Week should look like.

Tokyo, Moscow and Shanghai all made digital transitions, showcasing collections and shows online through live and pre-recorded media with the latter city racking up 2.5 million viewers in the first three hours of streaming.
As COVID-19 sheds more light on climate change and sustainability, an overhaul of Fashion Week has been sparked for the greener good. By September’s presentations of the Spring 2021 collections, digital shows were commonplace. Big names such as Gucci and Saint Laurent opted to sit out, while other designers took to the runway to showcase more eco-friendly elements within their ranges.
Balenciaga introduced its Spring 2021 collection in Paris with every look made from certified sustainable or upcycled materials.

Gabriela Hearst utilized 60% deadstock fabrics for her latest collection. The designer also offset emissions from the show by donating to a Peruvian charity that protects the Amazon rainforest.

Y-Project showcased its Evergreen collection, reworking 16 of its signature pieces in a more sustainable version, including organic cotton and recycled fabrics.

Stella McCartney debuted an A to Z manifesto, which was emulated throughout the collection. Dresses were created using overstock, while footwear featured 50% recycled materials.

Ahluwalia created its full collection using repurposed vintage garments and deadstock fabrics.

Sindiso Khumalo worked with hand weavers in Africa for her collection and used materials such as hemp.

Marni created 25 patchwork coats using outerwear from previous seasons.

Balmain debuted eco-friendly denim, while using recycled Swarovski crystals for embellishment.

Marques’Almeida opted not to create a new collection for SS21. Instead the label launched a sustainability manifesto, pledging to use more sustainable materials.
1.4 Intersectional Environmentalism

As the climate crisis continues to reach critical mass, sustainability has become somewhat of a buzzword within fashion. Yet, while retailers made the switch to organic cotton, many neglected to acknowledge the poor communities of color who experienced injustices from the industry’s processes, including fashion’s enormous contribution to landfills. This is not a new conversation. Unfortunately, it’s one that has taken the urgency of a global pandemic and political unrest to be reignited.

Intersectional Environmentalism identifies how marginalized people of color are often left out of the conversation yet are the most vulnerable to negative environmental impacts. Within the fashion industry, the current systems in place primarily benefit the elite while harming disadvantaged Black and Brown communities who are most at risk to the effects of climate change and pollution.

Climate activist, Leah Thomas (@greengirlleah), describes Intersectional Environmentalism as, “an inclusive version of environmentalism that advocates for both the protection of people and the planet.”
As many fast fashion brands took to social media to show solidarity for Black Lives Matter, people quickly pointed out the failure of these companies to look inwards and address the injustices happening in their own supply chains with predominantly BIPOC workers subjected to dangerous working conditions and low wages.

As previously discussed, COVID-19 has encouraged fast fashion to experience a much-needed slowdown. However, the repercussions of orders canceled and factories closed were felt by marginalized communities, leaving garment workers in tough financial positions.

The Bangladesh Garment Manufacturers and Exporters Association (BGMEA) reported more than $3 billion in canceled or suspended orders, impacting more than 2 million garment workers

- Remake
Initiatives in 2020

Remake launched the #PayUp petition, calling out some of the largest fashion brands to foot their bills. Currently, 20 brands have joined with the latest being Primark, Gap, Levi’s, Nike and ASOS, (image top left).

Gucci launched its Equilibrium platform to generate positive change for people and the planet, including setting up scholarship funds through its Changemakers program, aiming to improve opportunities in fashion for young people from diverse backgrounds, (image top right).

Tommy Hilfiger launched its Make It Possible program, which focuses on becoming more sustainable through a series of 24 targets across pillars including social, diversity and ecological values, (bottom image).
The events of 2020 have made it clear that the fashion industry cannot return to its pre-pandemic processes and levels of mass production. There is an increasing mindset shift around the degrowth movement – working less, buying less and making less. Going beyond the need for minimalism, retailers need to encourage consumers to make slower and more ethical fashion choices, spotlighting the concept of “buy less, buy better.”

Businesses need to rethink their sustainable commitments, ensuring diversity and inclusion are at the core of brand values and sustainable good is being felt throughout the supply chain for both the people and the planet.

The bottom line is the industry has to do better with the future of sustainable fashion and go beyond capsule collections. Transparency and waste management from overproduction needs to be brought to light and labels cannot truly identify as sustainable if they ignore the fight against social justice – regardless of the fabrics listed on the care tag.
2.0 Growth of sustainable fashion and its opportunities

While fast fashion arrivals slow down, products described with sustainable keywords are becoming more commonplace as retailers evolve their assortments in line with shifting priorities and consumer demand.

The EDITED Market Intelligence Platform can identify the materials and terminology used to describe products available online and pinpoint how often a word is promoted within marketing communications. This highlights where the opportunity for investment lies and gives retailers insight into the best times to communicate sustainability efforts and achieve maximum awareness for your campaigns.
Mentions of “sustainability” and iterations of the word are featured weekly in retailers’ communications to consumers. April is the core month for eco communications in line with Earth Day and Fashion Revolution Week. Other events such as Veganuary, June’s World Ocean Day, Plastic-Free July and Second-Hand September also saw high mentions around sustainability across these months.

Image: Vestiaire Collective Email UK - Sep 18, 2020

2.1 Growth of buzzwords and communications:

1,722 mentions of sustainability and iterations of the word in emails sent in April when both Earth Day and Fashion Revolution Week took place.
Growth of sustainable fashion and its opportunities

With the highest number of products arriving between January and September, "conscious" has emerged as the new buzzword.

In the US and UK, there are 444% more products arriving described as "conscious" since 2018 and 22% since 2019.
As sustainable products slowly become more mainstream, YoY growth is starting to stabilize with percentage increases significantly lower between 2019 and 2020 than in 2018. The fashion industry may appear to have taken significant strides over the past few years, but it’s not the full picture. These products combined only account for less than 4% of new arrivals in 2020 across both the US and UK.

<table>
<thead>
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<th>Increase between Jan - Sep 2018</th>
<th>Increase between Jan - Sep 2019</th>
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<tr>
<td>Conscious</td>
<td>+444%</td>
<td>+22%</td>
</tr>
<tr>
<td>Sustainable</td>
<td>+280%</td>
<td>+67%</td>
</tr>
<tr>
<td>Eco</td>
<td>+253%</td>
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<tr>
<td>100% Recycled</td>
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<tr>
<td>Vegan</td>
<td>+185%</td>
<td>+13%</td>
</tr>
</tbody>
</table>
Growth of sustainable fashion and its opportunities

Using EDITED data, we broke it down further by looking into the categories that are changing the face of the industry for a greener future.

Products described with these top-level keywords only make up 3.6% of products in the US and 3.4% of products in the UK arriving between January and September in 2020.
2.2 Activewear

No retail category will emerge from the coronavirus pandemic unscathed. However, activewear and athleisure have fared better than most. Additionally, it’s a category that’s experienced a significant sustainable overhaul with cult labels and sports brands experimenting with material innovations and eco-friendly designs. Sustainable activewear for menswear has increased 65% YoY, while womenswear is up 45%.

Image: Outdoor Voices
Repurposing materials is key as recycled styles accounted for 20% of total activewear arrivals from January to September vs. 10% in 2019. Assortments are dominated by recycled synthetic fabrics such as polyester and nylon, which significantly reduces the environmental impact created in manufacturing when compared to producing virgin materials. Activewear made from recycled polyester has increased by 80% YoY and nylon up 90% YoY. Natural fabrics remain important in this sector too, where investment in organic cotton activewear has grown 18% YoY.
2.3 Sneakers

Sneakers are traditionally made with virgin plastic, making them hard to break down and recycle. The success of activewear and streetwear has emphasized the need for more environmentally-friendly alternatives with less resource-intensive materials and processes. Overall, sustainable sneakers have grown 118% YoY, while those described as recycled are up 244%.

Adidas UltraBoost DNA Loop

Crafted from 100% recyclable single TPU material and no glue, the sneaker is “made to be remade,” which can be returned and reimagined into a new product.

Pangaia sustainable sneaker

The cult brand recently debuted its first sneaker. A zero-waste model crafted using grape leather from the wine industry’s waste and recycled rubber.
Nike Space Hippie 04

Boasting the lowest carbon footprint from the Space Hippie range, this style is made from 25% recycled material by weight with 85% recycled polyester uppers.

Allbirds Tree Dasher

It features a flexible one-piece upper made with FSC® Certified eucalyptus trees, a sugarcane midsole and an outsole from SweetFoam™ - the world’s first carbon-negative green EVA.

Veja Condor

"The first post-petroleum running shoe." It is 53% natural-based and recycled, utilizing materials such as sugar cane, banana oil, wild rubber, recycled EVA and an upper made from plastic bottles.
Hummel HIVE Vegan Capsule

The label reworked five of its most popular models in vegan-friendly leather and recycled materials.

NA-KD apple sneaker

Uses faux leather partly made with waste from apple production and a 70% recycled rubber sole.

Reebok Forever Floatride GROW

Its first USDA certified plant-based sneaker made from castor beans, BLOOM algae, eucalyptus trees and real rubber trees.
2.4 Loungewear

A category that needs no introduction. With consumers spending more time indoors and prioritizing comfort dressing, loungewear has evolved into a hero category for retailers and the undisputed uniform of 2020. Retailers have seen the opportunity to rethink the materials used for tees, hoodies, cardigans and sweats. For the US and UK combined, new arrivals of sustainable loungewear items have grown by 93% since 2018 and COVID-19 has caused demand to skyrocket. Following the initial outbreak in March, the number of new eco-friendly loungewear items selling out for men are up 174% vs. the year prior, while womenswear sell outs have grown 135%.
The sustainable pandemic wardrobe is mainly made up of organic cotton T-shirts. However, the interest surrounding soft and cozy fabrics has encouraged retailers to invest in conscious cashmere, linen and even bamboo - a material that boasts antibacterial properties and is a growing area of interest in the COVID-19 era.

Increase in sustainable loungewear sell outs between March and September

+174% Menswear YoY  
+135% Womenswear YoY
2.5 Denim

The current climate combined with the prowess of loungewear has resulted in a challenging year for denim. Despite this, sustainability still remains a core focus in retailers’ assortments due to the high amount of pollution the production of this material causes the environment. A popular alternative is to use recycled or repurposed fabrics, which effectively reduces the chemicals, water and energy used for creating new products.

Denim arrivals described as recycled have increased by 417% from January to September vs. 2018 and were up 108% YoY. The durability of this fabric makes these products ideal for the growing second-hand market. Recently, Levi’s launched a buyback initiative in the US called SecondHand, allowing customers to trade in old products for a gift card equivalent to a portion of each item’s perceived value. The returned items are then cleaned, restored and made available to be re-purchased. According to the company, buying a pre-loved pair of Levi’s jeans through the initiative saves approximately 80% of the CO2 emissions and 700 grams of waste compared to buying a new pair of Levi’s jeans.
Growth of sustainable fashion and its opportunities

Sustainable denim
Based on the number of new styles arriving online in the US & UK between Jan-Sep

Levi's jacket - made with sustainable Water<Less™ technique
NA-KD Reborn jeans - 100% organic cotton
Similar to the concept of Intersectional Environmentalism, the future of sustainable fashion needs to be inclusive, prioritizing people as well as the planet. Brands can’t rightly call themselves sustainable if they are ignoring marginalized groups, which includes size.

The average American woman wears a size 16-18, while the average British woman is a size 16. Currently, less than 20% of conscious products in both markets cater to above-average sizes meaning retailers are neglecting a key demographic within their ranges. The limited sustainable size-diverse options could derail the slow fashion movement. The majority of fast fashion brands offer shop-by-fit categories, driving customers to purchase disposable, lower-quality goods that are more likely to end up in landfills.

Top left image: Instagram @hara_thelabel
Top right image: Instagram @reformation
Bottom image: Instagram @free.label
As the Gen-Z consumer celebrates diversity combined with the growing body positivity/neutrality communities, these influential groups have become more vocal on social media about inclusivity in fashion, proving this is an area retailers can no longer afford to ignore.
This category heated up post-lockdown with consumers wanting to get out and return to nature, reigniting interest in puffer jackets that are set to accelerate, especially in the UK where most socializing has been restricted to outdoor settings.

This year, sustainability has been the core selling point with retailers highlighting innovation in environmentally-friendly materials over lightweight and warmth properties, which traditionally dominated their communications.

Many mass market players debuted sustainable puffer jackets making the product more accessible. For example, COS, Gap, Topman and Uniqlo all released eco versions.

Increase in sustainable puffer jackets in the US and UK combined arriving between January and September:

+194%  
2018

+49%  
2019

Top image: Instagram @uniqlo
Bottom image: COS Email UK - Sep 27, 2020
Did you know?

Only 24% of face masks arriving in the US & UK between January and September are described as reusable or using sustainable materials.

2.8 Swimwear

Swimwear is built to withstand sun, chlorine and saltwater so the materials don’t break down, which further contributes to landfills. Additionally, its direct contact with the ocean can cause microplastics in the fiber to shed and seep out, harming marine life. Coronavirus has increased the conversation surrounding plastic waste as single-use masks and gloves have been found washed up along shorelines in Asia and Europe, reaffirming the importance of sustainability within this category.

Overall, swimwear has been a dormant category in 2020 as consumers were forced to cancel or postpone many of their vacations. Yet, interest in sustainable swimwear persevered with new arrivals at their highest, making this a prime area of investment when normal travel resumes.

Image: Instagram @indigoluna.store
Stella McCartney’s recently launched Stellawear range consists of swimwear that also transcends lingerie, daywear and yoga apparel, is creating items with more than a single wear purpose. The products are made of fast-drying, chlorine-resistant materials fabricated with Aquafil sustainable yarn, Roica Eco-Smart fibre and Econyl® regenerated nylon made using ocean plastic and textile waste.

Increase in sustainable swimwear in the US and UK combined arriving between January and September:

+185%  
2018

+44%  
2019
The World Health Organization (WHO) states 60% of all human pathogens and 75% of new or emerging infectious diseases originate from animals. With the outbreak of the coronavirus starting from a live trade market, consumers will further question their consumption and purchase of animal products, creating additional demand for vegan and eco-friendly alternatives and an opportunity for the luxury market to rethink their processes.

Pure leather continues to be big business for luxury brands even though product arrivals dipped between January to May. Vegan alternatives only make up 3% of leather arrivals, yet it’s becoming slightly more commonplace in this sector with 4% growth YoY. Cult brands such as Telfar and Nanushka are propelling vegan leather forward in this space, reframing it as an affordable luxury. Meanwhile, animal products are becoming less commonplace, particularly in the UK. Selfridges banned exotic skins in February and the UK is expected to weigh in on the future of wild animal fur exports when Britain leaves the EU in December. In the US, Nordstrom has become the latest major player to ban fur and exotic skin sales.
Despite luxury’s obsession with 100% leather, alternatives are bubbling up from the aforementioned examples, such as Gabriela Hearst’s deadstock leather collections, as well as apple and grape waste in sneakers.

Stella McCartney is casting a spotlight on the use of KOBA, a 37% plant-based material made with a corn byproduct to mimic fur, as well as Mylo™, a mushroom leather made with less water and greenhouse gas emissions than real leather. With investment from Lululemon and adidas, we can expect mushroom leather to be accessible across all market sectors soon.

Image: Instagram @mylo_unleather

Previous slide top left image: Instagram @stellamccartney
Previous slide top right image: Instagram @nanushka
Previous slide bottom image: Instagram @telfarglobal
The beauty industry responded to demand for cruelty-free products long before the boom in veganism we know today, putting this industry ahead of apparel in animal-free products. More brands are pushing “natural,” “green” and “clean” ingredients alongside recyclable and refillable packaging. COVID-19 has also caused businesses to rethink sample and tester products, helping cut back on single-use products. As demand for eco beauty continues to rise, combined with face masks becoming more popular lifestyle accessories, fair trade ingredients and recyclable packaging will be especially paramount within skincare, foundations, mascara, eyeshadows and eyeliner.

Responsible brand Raeburn announced its first foray into beauty in collaboration with skincare brand Aesop. Further details are yet to be released, however, the range is expected to highlight both brands’ shared beliefs, including practicality, functionality and purpose.
Increase in sustainable beauty products arriving between January and September:

+85%
US YoY

+61%
UK YoY
Growth of sustainable fashion and its opportunities

1. Garnier (top left)
Garnier hosted a self-guided virtual press event, called the World of Garnier Green Beauty, to promote its sustainability initiatives and goals. This included creating a circular model to become carbon neutral by 2025 and to source ingredients to improve biodiversity.

2. Armani (top right)
The release of the fragrance, My Way, was Armani’s first step towards achieving carbon neutrality for all beauty products and reducing its carbon footprint by 25% more by 2025. The perfume is designed with fully recyclable bottles and a functional refill system. It also represents a reduction in the use of cardboard, glass use, plastic and metal use.

3. Ulta Beauty (bottom)
Aimed at increasing transparency, Ulta Beauty launched its Conscious Beauty initiative to help shoppers identify more sustainable products by certifying brands under its five pillars, including clean ingredients, cruelty-free, vegan, sustainable packaging and positive impact.
3.0 The evolution of materials

While organic cotton is free from pesticides and chemicals, it still requires vast quantities of water to produce. Even the more sustainable materials aren’t without their pros and cons. However, they shape up to be less harmful to the planet than the oil-based fabrics that still dominate the fashion industry.
Arrivals in organic cotton are up 238% since 2018 and 97% YoY. Econyl® has grown 171% since 2018 and 40% YoY. Combined, bamboo and hemp products are up 2% YoY and 28% since 2018. Tencel™ products such as Lyocell and Modal have dropped 18% YoY but are up 14% since 2018, while linen arrivals have waned.

Christmas is losing its plastic sparkle.

Sequin arrivals between January and September across the US and UK have decreased by 36% YoY.
In contrast, all analyzed non-recycled oil-based materials have experienced a decline compared to one and two years prior.

Polyester arrivals have fallen 18% since 2018 and down 29% YoY. Elastane has declined by 18% since 2018 and 27% YoY. Nylon is also down 23% since 2018 and 30% YoY, while acrylic decreased 24% since 2018 and 34% YoY.

If fast fashion brands continue to trim back their assortments and sustainable alternatives become more mainstream, we can expect these materials to continue to trend down.
Are sustainable products really more expensive than their less environmentally-friendly counterparts? And are consumers willing to pay for it?

There is often a stigma that sustainable products are too expensive. Fabric alternatives, as well as factors such as sustainable packaging and adjustments to supply chains, will play a role in pricing premiums. EDITED records the advertised price points of goods arriving in the market over time to pinpoint the intended price retailers are setting for their garments.
EDITED data revealed the average price for sustainable goods market-wide is increasing. Breaking down the advertised price point across key categories arriving this year across mass market retailers in the US shows eco products are on average priced above core lines with the exception of outerwear for womenswear and swimwear for men.

In the UK, a similar story unfolded with eco-friendly outerwear commanding a lower price point. Despite this, consumers aren’t put off by purchasing eco products. The number of new sustainable products arriving and selling out between January and September has increased by 43% in the US and 54% in the UK.
However, there are some exceptions. With the uptick of mass market brands spinning off eco lines, pricing for sustainable goods has become more accessible with some retailers matching or lowering the price of their eco lines to core.

New jeans arriving between January and September in Zara’s eco collections sit at a lower price point than its core offerings.

In the US, men's core jeans are priced on average 9% higher than eco styles and women’s are 11% higher.

In the UK, H&M’s Selvedge jeans, which are advertised as partly recyclable, were priced the same upon entering the market as its non-recyclable Freefit® technology styles.
Eco vs. core line pricing analysis

Increase in average advertised price point for sustainable apparel stocked between January to September

+8% US YoY

+5% UK YoY
5.0
Year in review

Looking back on some of the many innovations and milestones taken by retailers to help shape the future of the industry.
**October 2020:**

- H&M launched The Loop in its Drottninggatan store - a machine that allows users to remake clothes without using water or chemicals by breaking down old fabrics into fibers, which are then spun into yarn and knitted into new garments.

- Gucci partnered with The RealReal to create an online shop on the platform where the resale site has pledged to plant a tree for every item by the designer sold as part of the One Tree Planted initiative.

**September 2020:**

- Burberry announced plans to issue a sustainability bond to attract investors to fund social and environmental improvements.

- ASOS launched a unisex circular collection.

**July 2020:**

- Uniqlo banned alpaca wool from its ranges.

- Gap partnered with recycling service ThredUp to make it more accessible for consumers to recycle unwanted goods, reducing landfill waste.

**June 2020:**

- Veja opened a sustainability lab in France.

- ThredUp published its latest Resale Report projecting the second-hand market to grow five times in size over the next five years.

**August 2020:**

- Selfridges partnered with HURR Collective for a designer rental collection as part of its Project Earth initiative.

- Levi’s collaborated with Ganni on a range of upcycled pieces only available for rent through Ganni Repeat.
Canada Goose committed to using only reclaimed fur by 2022.

Wrangler outpaced its original goal of saving 5.5 billion liters of water by the end of 2020.

Among the many retailers showing support for the coronavirus pandemic, Sandro announced it would make 10,000 protective masks for non-medical use upcycled from previous collections.

Vestiaire Collective held a charity sale partnering with celebrities to donate pieces from their wardrobes with profits supporting WHO and local French charities.

Paul Smith announced the removal of all exotic skins from future collections.

Prada teamed up with UNESCO’s Intergovernmental Oceanographic Commission to educate secondary school pupils on sustainable practices to preserve the oceans.

April 2020:

- Canada Goose committed to using only reclaimed fur by 2022.
- Wrangler outpaced its original goal of saving 5.5 billion liters of water by the end of 2020.

March 2020:

- Among the many retailers showing support for the coronavirus pandemic, Sandro announced it would make 10,000 protective masks for non-medical use upcycled from previous collections.
- Vestiaire Collective held a charity sale partnering with celebrities to donate pieces from their wardrobes with profits supporting WHO and local French charities.

May 2020:

- Zalando developed a mandatory sustainability assessment for private labels and partner brands stocked on the site.
- Walmart partnered with ThredUp to allow consumers to shop second-hand pieces from the platform on Walmart’s website.

January 2020:

- In solidarity with Australia during the bushfires, Réalisation Par, Everlane, boohoo, Allbirds and more retailers pledged to donate profits or encourage consumers to support organizations to help fund social, environmental and wildlife charities.
- Adidas announced its commitment to reduce ocean pollution by using only 50% recycled polyester in its lines this year.

February 2020:

- Paul Smith announced the removal of all exotic skins from future collections.
- Prada teamed up with UNESCO’s Intergovernmental Oceanographic Commission to educate secondary school pupils on sustainable practices to preserve the oceans.
Interested in seeing additional reports, data-based insights or a demo?

Make more accurate decisions across your entire organization using retail market data and competitive intelligence.

Contact hello@edited.com to speak to one of our product specialists.
EDITED methodology

New in/arrivals: The first time a product has arrived online.

In Stock/stocked: At least one SKU is in stock and the product itself is not discontinued.

Sell out: EDITED records a product as reaching "sell out" when 100% of SKUs have gone out of stock, having previously been in stock.

Advertised full price: The highest advertised selling price of any item for a retailer, brand, product type or assortment.

Analysis: Data from 180+ online retailers spanning luxury, mass market and department stores across the US & UK market.


Glossary and methodology

- US Cotton Trust Protocol and Economist Intelligence Unit (EIU)
- United Nations Alliance for Sustainable Fashion
- Amnesty International