

Changing fashion: what people want from a greener clothing industry

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Methodology

Three scenarios were developed to illustrate the potential for increased reuse and recycling to reduce the raw material needed to meet UK demand for clothing.

The three scenarios are summarised here:

	Reuse rate	Displacement rate	Recycling rate
Business as usual	25%	54%	16%
Moderate	40%	60%	26%
Transformative	60%	65%	53%

The business as usual scenario is designed to reflect what might happen with current commitments from business, which are mainly focused on recycling. Therefore, the scenario assumes the clothes reuse rate remains at current levels of 25 per cent, based on: J Millward-Hopkins et al, 2023, *A material flow analysis of the UK clothing economy*.

As companies are already committing to recycled content targets, fibre-to-fibre recycling increases from one to 16 per cent, based on the base case scenario for 2030 set out in McKinsey, 2022, *Scaling textile recycling in Europe – turning waste into value*. The displacement rate, ie the percentage of reused purchases made instead of, rather than in addition to, new purchases, is 54 per cent, based on analysis from: WRAP, 2023, *Circular business models guide for fashion: how to get started*.

The moderate scenario is designed to reflect a significant uplift in reuse and recycling, but not reaching the technical maximum potential. This assumes the reuse rate increases from a baseline of 25 to 40 per cent, and fibre-to-fibre recycling increases to 26 per cent, based on the best case scenario for 2030, as set out in McKinsey, 2022, *Scaling textile recycling in Europe – turning waste into value*. The displacement rate increases from 54 to 60 per cent.

The transformative scenario is designed to reflect a technical maximum potential for recycling and high rates of reuse. This scenario assumes the reuse rate increases to 60 per cent, the displacement rate increases to 65 per cent and fibre-to-fibre recycling rate reaches maximum potential at 53 per cent, based on: Valpak, 2023, *TextileFlow: from waste to worth*.

Across all scenarios, the recycling rate includes a wastage rate of 7.5 per cent, as recycled fibres do not replace new fibres one for one, based on: Ellen MacArthur Foundation, 2017, *A new textiles economy: redesigning fashion's future*.

Percentage of raw material reduction is calculated compared to current consumption of over one million tonnes of clothing per year, according to: WRAP, 2019, *Textiles market situation report*. The table below summarises the results:

	% raw material reduction due to reuse and recycling
Business as usual	14
Moderate	30
Transformative	63