

CONTEXT: Interviews conducted as part of an investigation into the barriers to, and opportunities for, achieving Circular Synthetics. Research was funded by Business of Fashion, Textiles and Technology Creative Research & Development Partnership (BFTT CRDP—£5.5 million) led by the University of the Arts London, part of the UK Creative Industries Clusters Programme (CICP) funded by the Industrial Strategy Challenge Fund, and delivered by the Arts and Humanities Research Council (AHRC) on behalf of UK Research and Innovation.

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Interviewee: Materials manager, sportswear brand

**1: Interviewer**

**2: Interviewee**

**1:** As a starting point, can you tell me a bit about the background of [redacted] and your role within the company?

**2:** [redacted] is a [redacted] company. It was founded just after second World War [redacted] That's how it all started. I think [redacted] came to Europe in the '70s. I'm working now in [redacted] in head office. My role is I'm the material manager for all the apparel and accessories that we develop.

We are a performance brand. [redacted] We have two seasons, summer and winter. For both of the seasons, we try to put in new innovation. Of late, that comes often through sustainability. I have to say the company still needs to define clearly what it wants to do with sustainability. Whether we see it as a competitive advantage or that we see it as something that we need to do. That's for the board to decide. Working there now for 12 years. It's good.

**[redacted]**

**1:** On the types of materials that you use and the product that you have, what percentage-- You don't have to be exact, but how much is footwear and how much is apparel within [redacted]?

**2:** We are predominantly footwear-driven. [redacted]

**1:** That puts into perspective. Then on a synthetic side, and specifically we're looking at polyester and PET, how much of a part of your work in [redacted] is around those materials?

**2:** I think only training collection we use a natural fiber, cotton. The rest, everything in running is only polyester or nylon, and then it's 95% polyester. The same for our tennis collections, rugby collections. It's all polyester.

**1:** Sorry. Just one final thing and specifically on that. Do you use a lot of elastane in that polyester?

**2:** We try not to.

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1: It is there somewhere.

2: But for leggings, yes. If it needs stretch, we put elastane, but not because--

1: Just a clue. Moving onto the next part of the question. What have your experiences been with dealing with circular synthetic at [redacted]? Have you had any experience with trying to source that approach either through end-of-life or from beginning of life? What has been your previous--

2: The whole [redacted] story was for us a bit of a kick start to look into circularity. We tried to work on a project with a Dutch-- I would say it's durable, sustainable, entrepreneurship something. It's a government-led organization called [redacted]. Maybe you've heard of it. We worked with them and they tried to put a conglomerate together with different partners because they knew one part in Holland that can help the technology for chemical recycling.

That project after a year and a half talking, it didn't go anywhere. Then we started looking further because we didn't want to-- We do see that circularity is where we need to go. We are not big enough that we can set a project up like that ourselves or we can do massive investments. We need some party like [redacted], that we can just hop on a train and get aboard. My introduction with circularity comes also with working together with [redacted]. Circularity for [redacted] is it becomes more high on the agenda. The product teams start to understand it, the design team start to understand it.

We have a roadmap to-- Many other companies have roadmap to 2030 and then we've done a certain commitment on we want to reduce our carbon footprint with X percent. How do we get there? First phase is switch all the virgin polyester to recycled polyester. We are quite far with that. Then what's the next phase? Next phase has to be circularity. You see it here, everything in Amsterdam it's a circular hub. People are always knocking on our door trying to explain, trying to work with us. Next phase for our sustainable goal setting would be introduction of more circular stores. It will take a while before we can introduce the [redacted] output for example that will still take two or three years but there are some other parties globally that also offer circular type of product.

1: Specifically, what has your bit-- At the moment I'm presuming that all of the recycled polyester comes from bottles.

2: Yes. Right now we have around 70%, 80% recycled and that comes from PET bottles.

1: Then in terms of the-- Have you tried at all to put any output from a fiber to fiber process into your--

2: Yes.

1: You have.

2: We are a [redacted] company, and also in [redacted], we do product development. We work closely with the teams over there and this year was going to be the Olympic

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year in Tokyo. It was an important project for us. They had a Reborn project. They worked with the [redacted] company. They did chemical recycling. Part of the inputs was old garments worn by athletes that won medals on the Olympics or participated in the Olympics. They were put in the recycling process. We made a delegation package for the [redacted] team. Garment to garment.

**1:** Wow. That sounds brilliant.

**2:** Also for the volunteers that were going to work at Olympics. In nine collections now, we use some yarns that come from [redacted], that are also made with at least 5% old garments. That's a company that sources waste streams all throughout China. You never know what is in there but it's clippings from production. It's all types of waste streams.

**1:** That's interesting. Sorry. That sounds fascinating, the approach for the Olympics. What was that? Is there any information that I can gather on that in terms of what the organization was or who were organizing?

**2:** Yes. Let me try and find for you.

**1:** You can do it after. It would be just great to read more about that afterwards. That's fantastic. Will that still go ahead when the Olympics happens, or is it all on hold or-- Not sure.

**2:** I think it's still going to go ahead.

**1:** Fantastic. That sounds amazing. In terms of end-of-life, have you done anything, any initiatives or tried to engage with anything around-- I don't know, for example, production waste, deadstock or post-consumer collections, or anything like that.

**2:** That's where the biggest challenge is. We organize a lot of marathons globally, but we control what we do in Europe, and we do have collection bins or collection programs at the marathon.

**1:** That's interesting. That's a good idea.

**2:** But most of it goes to [redacted]. We don't use it for our own production processes. This is definitely an area that we need to look at. We need to start making products that are easy recyclable or made with mono-material or at least that can be taken apart easily. We need to find the right program for us for our recycling. Can be collection at shops, can be collection at-- Continue to do it at marathons, at events.

**1:** That's interesting.

**2:** Because at the end of the day when we started [redacted], when bulk production starts, we do want to give in our own input. We can never do it real garment to garment or one on one because our volumes are pretty small but we do want to give some part of the input.

**1:** That's okay. Brilliant. I want to move on to a slightly negatively-- To the barriers to using circular synthetics within your business. What do you perceive as being the biggest barrier to you engaging in that full circular story at the moment?

[silence]

**2:** If the [redacted] project does what it will do, what its potential is, then the only barrier is our own processes, collection of our own garments. End-of-life for our own products.

**1:** That's the biggest stumbling block. Do you mean logistically or--

**2:** Yes. The industry will move-- It will move in the direction of circularity. If it's not [redacted] it will be somebody else offering that type of recycling. I don't think prices will be such an issue. They will come down. At the moment it's pricing. I would say it's a barrier but it's a short-term barrier and it's something that we want to invest in now. Long-term is organizing our own end-of-life.

**1:** In terms of the end-of-life then, is that something that a brand can do to engage with the consumer and try to-- Obviously you talked about the marathons and you're putting collection bins there. That's obviously a type of education engagement trying to get the customers on board. Is that a key role do you think for the brand?

**2:** Yes. I think so. Yes.

**1:** Obviously we're talking to different stakeholders and they're raising questions of other stakeholders if you like, from their perspective. One of the things which someone mentioned which was quite interesting was that in the short-term, post-industrial waste is going to be more important than post-consumer waste just because there is quite a lot of it and even that is not being recycled to the amount that it should be. Is that something that [redacted] can get on board with, trying to encourage that in some way within your supply chain?

**2:** Yes, yes, yes. Yes. If it's post-garment production, there's always a huge waste stream that we don't see. That goes out of the back of the factories. We don't see it. Most of our factories are quite ethical. They have the right connections that something good comes from it, that it will be recycled. For cotton, for example, that's a very good way to recycle and reuse it. It's easy to separate. Still, in the factory, you control everything. You know what's in there chemically as well. That products that come from China. That those yarns that we buy that are not garment to garment but are mostly posts-industry recycled. For our own internal definition, we consider that circular. Yes.

**1:** Okay, perfect. You mentioned a couple of times just thinking about the barriers, and then we're going to move on to think about what the opportunities are. You mentioned a couple of times you can't see some of the parts of your supply chain lifecycle and what happens to your products, that perhaps that you would like to or that would help in some way. What do you think about this idea that the transparency can be enabled through a product ID or a material ID? There are some technologies

developing around that. Enabling information about what happens further upstream or further downstream. What are your views on the potential for those types of--

2: What technologies would that be?

1: There are a couple of things in development which would enable, for example, RF tagging, but I think there are some more high tech material-based information technology systems that people are looking at to enable information to be available about where the material comes from, connecting the fiber to the yarns, to the textile through the whole supply chain and then out towards the end as well.

2: Yes, you can always go back to where it comes from.

1: You have a good sight of that at [redacted]?

2: I know, for example, that when you buy recycled polyester, you can get the right certification from the suppliers, but you never know if it's really recycled polyester because the qualities are comparable. What some of the yarn suppliers do, they add a chemical to the yarn, which is specific for that production, and maybe the certain production batch that later on, if you want to know where it comes from, that's the traceability.

1: Oh, okay. That's interesting.

2: You're talking about the other way you're tracing it to [crosstalk].

1: Well, I'm talking about both actually. I think that there are people looking at taking it right from the fiber that which you're talking-- Well, not the fiber, but the yarn. That can trace it, but it's not more specific than this fiber came from-- This yarn came from this mill.

2: I will be very interested to know what happens to our products. Yes.

1: Do you think that's something that [redacted] would invest in if there was to be a system of information?

2: Yes. I think so.

1: I think the idea is that something like an RF tag could be added and then that would give each stakeholder within the journey if you like, some information about that.

2: Yes, yes. That's very valuable information, yes.

1: Moving on, where do you think the opportunities lie for achieving circular synthetic textiles for [redacted], for example? In what timeframe? You mentioned three to four years that you think that [redacted] might come online. That seems quite optimistic? Is that how you see it?

2: Yes. We have now in our line, the yarn that we buy from China and I can increase that percentage. I do hope that we get a small collection from [redacted] relatively in

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three years. We have to fill the gap until then. Until [redacted] comes, I have to buy alternatives.

**1:** Do you see your customers, your end-users if you like, as being ready for this? Do they want it? Are they on-board with it? Are they willing to pay more or they will buy it but it's--

**2:** No, I see that the product team is not ready yet and that also our customers. We are quite late starting with sustainability but we're going really fast now. Spring 20, which is in the shop since last January is the first season that we really pushed sustainability in terms of stable cotton for our trainer collection and recycled polyester. Our markets are just getting used to [redacted] trying to be sustainable. We're going quite fast. I think if it's explained to all our sales offices, that they would get some momentum, more enthusiasm for it. I don't have to [unintelligible 00:26:09] yet.

**1:** No yet. No. I suppose it's quite different for [redacted] in a sense because you've got additional challenges with the material being within trainers. They have a difficult end-of-life in a sense to separate that material.

**2:** Yes.

**1:** That's slightly different from apparel, isn't it?

**2:** Yes. Footwear is more-- I'm not responsible for footwear but footwear is more traditional. These are old, big factories. We have a relatively small organization. I can make changes. I have done quite easily.

**1:** But with footwear, it's like trying to move the Titanic.

**2:** Yes, yes.

**1:** That's interesting. Something that just occurred to me about the-- Do you think the brand has-- Not an obligation. Maybe a responsibility to educate their customers a bit? Because when I'm looking at the stakeholder map, the brands are the ones, as well as the media, who have the closest relationship almost with the customer. A lot of the other stuff is out of site. Is there a responsibility there to educate customers to bring them on board and to give that messaging?

**2:** Yes, often we do things with ethics without talking about it. That's a little bit our-- I think sometimes we're too humble. We have a lot of certainly good products and also good initiatives. Either there's maybe not an optimal route to consumer-facing, online or marketing or whatever, or there's [unintelligible 00:28:13] a [redacted] attitude that we don't want to speak about. We don't want to pat ourselves on the shoulder.

**1:** That's interesting.

**2:** We have a different type of program in Sri Lanka. We source a lot of our garments in Sri Lanka. In Sri Lanka, there is a big program where beach waste is being collected. [redacted] we have something now in which we want to do something for the community. The beach cleaning program, all the bottles are being collected,

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different distribution points, and then centrally recycled, grinded, flakes made, and in the same facility, they're made into yarns.

One of our garment firms in Sri Lanka has invested in that. For us, that's a very important program. We are certainly going to talk about that. It is going to launch over the summer. In this, we want to educate. We want to tell the story. We've done it with videos and we'll do it with shot material, et cetera.

1: That's interesting.

2: Other than that, it will just be a tech somewhere that's sustainable.

1: I just want to go back a little bit because I didn't ask you at the beginning. Just a tiny little bit more about what your role is, who you talk to within-- You mentioned your product department and you sit outside of that. Where do you sit within the-- Who do you mediate between and to talk to?

2: Yes, I know. We're all one product team. I work directly with design and product marketing teams. I'm given the brief for the type of material that they like to have. I drive together with our CSR team, the sustainable strategy in line with the company strategy. The same strategy is now taken on board on a company strategy. We have much more-

1: That's good.

2: -empowerment to drive that. I lay out a plan with our product team when we select the fabrics to do several developments, how we can achieve those sustainable targets.

1: Perfect. Sounds like an amazing job.

2: It's very nice. Very nice.

1: This is a bit of a slightly off-piste, but we thought that it would be interesting to ask this anyway given this current situation. How do you see COVID changing? Will it change your plans in the short to medium-term or long-term around circularity or is it a blip if you like?

2: It's a blip. Short-term, every company is trying to protect their cash flow. Cash needs to come in, margins need to go up, but of course, we are now working-- We started work on spring-summer 22. The buy-in will be next year but we'll be in the shop in two years and then this is over. I hope so at least. I have had this talk also with [redacted]. It's a restart moment. I hope it will be. You want it to be and we will do our best to make sure it will be. Short-term is trying to save margins, cut the line, be smart, buy less, use up the inventory, et cetera, but it will have a positive effect, I think.

1: Oh, that's interesting. Do you see it as having a potentially changing attitudes in any part of the life cycle with-- I don't know, consumer attitudes or--

2: Consumer. I hope so. I don't know.

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1: [crosstalk] Maybe.

2: Myself, of course, you and I, we're consumers. Yes, I think so.

1: These are two examples of garments that are part of the case study that we've got from this team, we're a manufacturer. One is 100% polyester leggings and the other one is 100% polyester fleece, but it has zips. They both have this branding on, which can be printed or embroidered. From your perspective as working with [redacted], how do these types of garments-- Imagine, I guess that they're your garments. How do you see them within the life cycle at the moment in terms of circularity?

2: I think with the leggings-- We always produce the leggings with elastane. For us, the end-of-life for leggings is probably pretty tough. It cannot be disassembled and reused. Leggings often have zippers as well. Is that how you would like me to respond?

1: Yes, yes, carry on. Yes, yes, this is okay.

2: If and again if the [redacted] works and the chemical recycling, then it doesn't really matter. If it's polyester rich, it can be recycled. The elastane part, it will be lost but that's fine. You will still get all the polyester output. In traditional recycling, the leggings with elastane, it's really tough to recycle. You cannot. You have to probably go a landfill or be incinerated to something. The long sleeve-- It can be disassembled. From our side-- We have some elastane in it but we also have some of the items without elastane and these will be easier to recycle. You can take out the zip and then mechanically recycle if you like.

1: You say take out the zip. Is that something that happens already that you know of?

2: No, no.

1: You mentioned that you don't currently really-- You say you have the marathon collection bins and they go through [redacted]. [redacted] is at the moment the primary end-of-life that these garments-- That's the only part that you're engaged with. I say only part. It's still good.

2: Yes, exactly.

1: Perfect. Then, how about in the future? How would you want this to look? If we go on to the next slide. How'd you imagine it could look if it was the ideal situation from your point of view?

2: At least change zips. Make sure all the zips are made with polyester material. I would change the trim and try to find alternatives for elastane. Elastane is not so much-- Like I said, I think [redacted], chemical recycling technology foresees and you're able to input garments with different materials and it can still be recycled. The more polyester is in there, I have the more outputs are because elastane part is lost. I think the elastane part is also-- It's not a sustainable raw material.



**1:** You talked as well about how you would see the [unintelligible 00:38:56] that you would input to the [redacted] process and then get some of the material back. Almost like an open-closed kind of a loop. Is that how you think it would ideally work from your point of view that you would manage somehow the collections and then input that into a specific chemical process or partner?

**2:** It all depends where the factories will be built, and where we do the collection. All our garments and all our fabrics are now all coming from Asia. We don't have control over there in the sense of-- We don't have programs for clothes collection. We only have that in Europe. Of course, we're not going to collect in Europe and then ship all that to Asia to do use it and then ship it back. This is something that we have to work with our CSR team in the next two years to give that some thoughts. A company plan and maybe it will change our sourcing strategy as well.

**1:** Yes. That is a really important thing, which I think is not necessarily talked about enough, is how you enable these loops with the global distribution, and especially with exports of textile waste and that type of thing. Do you see any--

**2:** Maybe it works more as a-- We put so much in and it doesn't matter where we put it in and we take so much out and it can be a different location like a BCI program or something. Like a much-balanced system. It does not necessarily that what you put in, is what you use, that you can claim that this is made from old [redacted] clothes.

**1:** It's more of--

**2:** It's a bigger picture.

**1:** It's more of a pooled resource of recycled PET that then you contribute to, and then you utilize as well.

**2:** Exactly. Exactly.

**1:** I imagine you don't foresee the manufacturing can come back to your-- In the near future or the near to medium future. It's always going to be at far East or--

**2:** No, I don't see it maybe.

**1:** No, okay. Fantastic. Just briefing to this idea of a roadmap. What do you think-- Having discussed all those types of-- What ideally would happen-- What do you think is important in terms of your partnerships in the short-term, medium-term and in the future? Who do you see as important or for [redacted] to focus their attention? I don't know, either in investments or partnerships or areas they need to develop, or you need to develop. [redacted] is obviously an important one.

**2:** Yes, that's the main one, to be honest.

**1:** What about in terms of collections, are you--

**2:** Collection, that's the responsibility that lies with our CSR team and also with the global team. Yes, that is really important and I think we work with [redacted] because they're the biggest, but I'm not sure if [redacted] is the right partner for the future.

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**1:** New partnerships possibly?

**2:** Yes.

**1:** We talked briefly about transparency, is that something that you think is important for-- How might that play out in the future? Do you think or is it transparency through your relationships rather than any--

**2:** At the moment it is [unintelligible 00:43:25]. Maybe we'll probably need a closer connection with our yarn suppliers. I can trust that the relation with fabric mills work with the [redacted] output. I think maybe that's where we need to put some focus in. As you asked me before, it would be very valuable to get inside what happens to the product after it's being sold to the consumer. How long will they use it? What route will it take? When is really end-of-life?

**1:** That's about knowing how your customers actually use the product, isn't it as well? That's quite nuanced in a way. That's something or perhaps only [redacted] can do themselves. Would you agree with that?

**2:** Yes. Maybe the apps or-- I don't know. People are very smart these days. In our own shop, of course, we know we have the landscape of the consumer more or less visible. We're still a wholesale brand. The moment it leaves our warehouse, it goes to the wholesalers. We lose some visibility.

**1:** This is definitely something around the relationship with the customer after the product leaves [redacted], which is quite interesting. Just going back to the-- I wonder that's the right connections. The connection with the yarn suppliers and mills, would you say that at the moment you have quite a good relationship with those suppliers?

**2:** Yes.

**1:** Are you able to leverage your relationship to bring them on board with some of these?

**2:** Yes, definitely.

**1:** The yarn suppliers and the fabric mills tend to be in what location? Whereabouts are they globally?

**2:** Taiwan. Some of the yarn makers are in Taiwan or China. Some mills also in Vietnam, but Taiwan, Vietnam, China.

**1:** I put those in roughly the right place. Let me just see information, but you see this is something that CSR needs to look at. Presume about, as opposed to the use phase. It wouldn't be something that you would be directly involved with.

**2:** We're doing this together with CSR. They need to drive it but we're working on-- Because it goes now hand in hand with also how we make our product.

**1:** That's with the actual product design.

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2: Yes.

1: That CSR are based in [redacted]?

2: We have a CSR team here in Europe as well.

1: Perfect. Anything else you'd like to add to that you see it as being particularly important? I don't know. I'm thinking maybe investment or policy. There's a potential for Extended Producer Responsibility coming on the horizon. Does that come in here anyway?

2: I think EU is going to release a strategy next year, especially on the apparel industry. All that roadmap to being 2050-- Europe needs to be--I would say carbon-neutral or something. They're going to lay out some of the rules that apparel and fashion companies need to meet. There are going to be strict regulations or stricter regulations on the raw material being used for products and recyclability. I think that's an important one to focus on. Work with the right garment vendors. Provide us the right source base for materials. We have a relatively small source base and we work with the right suppliers.

1: You feel that you're almost already set up for making those responsibility changes that they're going to ask for almost?

2: If somewhere we need to make changes, it's probably on the material side.

1: Relationships is already in place for that?

2: Yes.

1: You're not looking at it thinking, "How are we going to do that?" You're ahead of the game, aren't you really, from that point of view?

2: Yes, we have a good relationship with our mills, and they have a good relationship with all the yarn suppliers. I'm pretty confident that we can manage this.

1: Okay, perfect. We can leave that or unless there's anything else you'd like to add. Look at these terms. Did you have anything that you wanted to add to that or change or any comments based on the definitions that I sent through? I've got them on this final fourth slide.

2: I can't see them, can you show them?

1: They're on the fourth slide. Can you see it?

2: Oh, yes, yes.

[silence]

2: I read them yesterday briefly. Yes, these are very good definitions.

1: Oh, good.

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**2:** I was almost going to take them all for myself.

**1:** Everything that we come up with, as a result of this project, is going to be open source. We will write an accessible report. Not a really long and we are the only one. Potentially also policy briefings, if there's something that we feel, needs to be said which hasn't been said. Also, I was going to ask anyway, if you're happy, we will like to come back to everyone we've interviewed with what we've come up with, our findings, and potentially a roadmap if that's the shape that it takes for your feedback. If that would be all right with you?

**2:** Yes, of course. No problem. Yes.

**1:** Perfect. Unless you have anything else to add, then I'll leave it there for now.

**2:** No, I think I've said everything--

**1:** Brilliant. Thank you so much for your time and good luck in the current situation.

[END AUDIO]