Towards a sustainable future of apparel
Perspectives from Swedish clothing brands and sustainable fashion consultants

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Table of contents

ABSTRACT ........................................................................................................................................... 1
LIST OF ABBREVIATIONS .............................................................................................................. 1

1. INTRODUCTION .......................................................................................................................... 2
  1.1 AIM AND RESEARCH QUESTIONS ......................................................................................... 3

2. BACKGROUND AND PREVIOUS RESEARCH ..................................................................... 4
  2.1 APPAREL INDUSTRY .............................................................................................................. 4
  2.2 SUSTAINABILITY STRATEGIES ............................................................................................ 4
  2.3 SUSTAINABILITY STRATEGIES IN APPAREL ................................................................... 5
    2.3.1 ‘Technological innovation’ strategies ............................................................................ 6
    2.3.2 ‘Design for social change’ strategies ........................................................................... 7
  2.4 DRIVERS FOR SUSTAINABILITY STRATEGIES IN APPAREL ........................................ 7
    2.4.1 Internal drivers ................................................................................................................ 8
    2.4.2 Market drivers ............................................................................................................... 8
    2.4.3 Law drivers ................................................................................................................... 9
  2.5 BARRIERS AND CHALLENGES FOR ACHIEVING SUSTAINABILITY IN APPAREL ...... 10
  2.6 SUSTAINABILITY IN THE SWEDISH APPAREL INDUSTRY ........................................... 10

3. MATERIALS AND METHODS ................................................................................................... 12
  3.1 SCIENTIFIC APPROACH ....................................................................................................... 12
    3.1.1 Research design ............................................................................................................ 12
    3.1.2 Inductive theory .......................................................................................................... 12
    3.1.3 Selection of topic and literature overview ................................................................... 13
  3.2 MATERIALS ............................................................................................................................ 13
    3.2.1 Empirical material ....................................................................................................... 13
    3.2.2 Selection of respondents ............................................................................................. 14
    3.2.3 Description of respondents ......................................................................................... 15
  3.3 INTERVIEWS .......................................................................................................................... 15
  3.4 METHOD OF ANALYSIS ........................................................................................................ 16
  3.5 ETHICAL CONSIDERATIONS ................................................................................................. 17
  3.6 LIMITATIONS ......................................................................................................................... 17

4. RESULTS ...................................................................................................................................... 18
  4.1 SUSTAINABILITY STRATEGIES ........................................................................................... 18
    4.1.1 Sustainability ................................................................................................................. 18
    4.1.2 New business models ................................................................................................... 19
    4.1.3 Product development and circularity ............................................................................ 20
    4.1.4 Mobilisation and collaboration ...................................................................................... 21
  4.2 DRIVERS FOR SUSTAINABILITY .......................................................................................... 22
  4.3 BARRIERS AND CHALLENGES FOR ACHIEVING SUSTAINABILITY ............................ 25
    4.3.1 Supply chains ............................................................................................................... 25
    4.3.2 Resource intensive industry ......................................................................................... 26
    4.3.3 Overconsumption ......................................................................................................... 26
    4.3.4 Sustainable materials ................................................................................................. 27
    4.3.5 Circular economy ......................................................................................................... 27

5. DISCUSSION ............................................................................................................................... 29
  5.1 SUSTAINABILITY IN APPAREL ............................................................................................. 29
  5.2 CONSUMER PERSPECTIVES ............................................................................................... 31
  5.3 TRENDS TOWARDS NEW WAYS OF DOING BUSINESS .................................................. 32
  5.4 SUPPLIER PERSPECTIVES .................................................................................................. 33

6. CONCLUSION .............................................................................................................................. 35
7. ACKNOWLEDGEMENTS ............................................................................................................. 36
8. REFERENCE LIST ...................................................................................................................... 37
APPENDIX 1 – INTERVIEW GUIDE FOR SUSTAINABILITY MANAGERS ................................. 40
APPENDIX 2 – INTERVIEW GUIDE FOR CONSULTANTS ............................................................. 41
Abstract

The manner in which clothing is designed, produced and used is responsible for major negative impacts on the environment as well as major ethical and social issues on a global scale. The increased concern for sustainability issues in the industry is similarly argued to have led to transformations of the business context of apparel companies, that have been shown to increasingly incorporate sustainability in their corporate strategies. This thesis focuses on sustainability strategies of Swedish clothing brands operating in the global apparel and fashion industry, with the aim to explore the topic of sustainability in relation to the Swedish apparel industry. Through qualitative interviews with sustainability managers and consultants working within the industry, it explores the drivers for working with sustainability as well as main challenges for achieving sustainability within the apparel industry. The results show that the concept of sustainability is indeed highly complex and broad in regard to the design, production and use of clothes. Companies are influenced by many factors that drive change towards sustainability. The future of the apparel sector is believed to be increasingly affected by new ideas to produce and indeed also consume clothes that challenge the dominating linear system. In conclusion, the industry faces many challenges concerning sustainability, but the proactive approaches by apparel companies seem to create new opportunities for change. Also, the anticipated further increase in interest for sustainability in society and subsequently among consumers and other actors may stimulate further advancements of the strategic responses among apparel companies.

*Keywords:* sustainability, apparel industry, sustainability strategies, drivers, challenges

List of abbreviations

B2B Business to business
CR Corporate Responsibility
EU European Union
NGO Non-Governmental Organisation
UN United Nations
1. Introduction

Worldwide, the textile and clothing industry constitutes one of the largest trading markets and employs roughly 300 million people along the industry value chains (Ellen MacArthur Foundation, 2017). The amount of clothes being produced has increased tremendously during the past few decades, and the production has in fact doubled between the years of 2000 and 2014 (UN News, 2019). However, the manner in which clothing items are designed, produced and used has numerous negative impacts on the environment, and is also associated with multiple ethical and social issues globally (Ellen MacArthur Foundation, 2017). Indeed, the textile and clothing industry has recently been identified as the second most polluting worldwide and is responsible for up to 10% of global greenhouse gas emissions, which is more than the combined emissions from flights and maritime shipping (UN Environment, 2019; Mamoq, 2018).

The industry has undergone a tremendous transformation in recent time, where globalization trends and outsourcing of production to different parts of the world has given rise to exacerbated environmental and social impacts. The linear and “fast” system, with low-cost readily available fashion, which comprises most of the industry today, has been identified as underpinning many of the sustainability issues of the industry (Bick, Halsey & Ekenga, 2018). Therefore, the sustainability efforts of fashion companies are increasingly becoming more scrutinized by researchers as well as by NGOs, media and consumers (Mora, Rocamora & Volonté, 2014). This upsurge of sustainability concern within the apparel and fashion industry has re-emerged from the main issues of the 1990s, that is, worker rights and safety in the production processes (Han et al., 2017).

According to Cleff, van Driel, Mildner and Walter (2018) there are two main concerns that are especially important for apparel companies due to public debate. One is the social injustices that arise from producing the clothing items, namely poor working conditions and low wages as two prominent examples. The other is the environmental damage from pollution, both in terms of, for example, chemical substance use and greenhouse gas emissions arising in the production phase. Subsequently, apparel companies are increasingly being held responsible for these negative impacts the industry has given rise to. As a response to this, apparel companies are progressively working with sustainability in various ways, both by developing their production processes or expanding their product development into green market segments (Desore & Narula, 2017). Sustainability practices of companies operating in the global apparel industry have been shown to be incorporated into the corporate strategies on an increasingly larger scale. The subsequent rise of sustainability strategies of these companies has become more widespread in the industry (Han et al., 2017). Indeed, evidence of the initiatives by apparel companies mobilizing on the issue of sustainability include the recent Fashion Industry Charter for Climate Action, where the industry commits to support the goals of the Paris Agreement through reducing their own climate emissions (UNFCCC, 2018).

The increased focus on sustainability in corporate strategies of apparel companies is evident from literature, and the increased concern for sustainability issues in the industry is similarly argued to have led to transformations of the business context of apparel companies (Mora, Rocamora & Volonté, 2014). However, because of the recent development of the sustainability strategies of apparel companies, there is a gap in research where the sustainability issues of the industry have been researched in a fragmented matter, with few studies taking a broader scope and macro approach to the topic (Desore & Narula, 2017). Indeed, Da Giou et al. (2016) and Macchion et al. (2018) argue that previous research on the topic of sustainability in fashion has
not considered environmental and social issues in the industry simultaneously. It has also been argued that there is a need for further insight in how sustainability strategies of apparel companies are shaped, what factors are driving these changes and what challenges they are facing when implementing them (Strähle & Müller, 2017; Caniato, Caridi, Crippa & Moretto, 2012; Desore & Narula, 2017). To approach this gap, this study focuses on sustainability strategies of Swedish clothing brands operating in the global apparel and fashion industry. Studying the specific industry of apparel within the context of one country is motivated by the fact that organisational practices can be assumed to differ between countries, due to distinct institutional structures of these (Pedersen & Gwozdz, 2014). Furthermore, the Swedish context is likely to provide interesting insights because of its fast expanding textile industry and its progressive stance on sustainability (Sweet, Aflaki & Stalder, 2019).

1.1 Aim and research questions

The aim of this thesis is to explore the topic of sustainability in relation to the Swedish apparel industry. More specifically, it strives to give insight in how sustainability strategies of apparel companies are shaped, from Swedish apparel company perspectives but also widening the discussion to that of sustainable fashion consultants.

In order to achieve the aim, the following research questions have been posed:

1. How are apparel companies working with sustainability?
2. Why do apparel companies choose to adopt sustainability strategies?
3. What are the main barriers and challenges for achieving sustainability in the apparel industry?
2. Background and previous research

This section aims to provide an overview of the literature relating to the stated research questions, giving an extended view of the up-to-date research of the topic. It aims to answer the following questions: What are some main sustainability strategies, drivers and challenges identified by previous research within the apparel industry? This will be used as a basis for analyzing my empirical material.

2.1 Apparel industry

This study focuses on sustainability strategies of Swedish clothing brands operating in the global apparel and fashion industry, which broadly consists of companies involved with “the design, production, and distribution of clothes, wearable accessories, and footwear” (Breitzer, 2017). The industry is characterized by being a global and highly complex industry, with low regulation concerning sustainability aspects (García-Torres et al., 2019). For the purpose of this study, the overarching term apparel industry will be used, as described by García-Torres et al. (2019) and comprises the whole industry of clothing and fashion. This is done for simplicity, and since many scientific works do not distinguish between the different terms “fashion” and “apparel/clothing”, or use them synonymously. What characterizes the whole industry is that it is highly globalized and international, and clothing items are typically designed in one country while produced in another. This is common for both the fashion and clothing sector (Strähle & Müller, 2017). Sustainable fashion is a well-established concept of sustainability research within fashion studies, and in many cases the literature uses the terms clothes, apparel and fashion interchangeably, making a distinction on an analytical level unpractical. For example, Strähle and Müller (2017) labels the entire textile and clothing industry as “fashion retail”. Literature on the textile industry also exists under the focus of sustainability issues of clothing, and this is relevant since the industries are closely interlinked, with more than 60% of textiles being used for the clothing sector (Ellen MacArthur Foundation, 2017).

Because of the complexity of the supply chains in the apparel industry, sustainability is hard to attain (Mora, Rocamora & Volonté, 2014). Mainly, the intense use of resources such as water, energy, land and chemical lead to a high environmental impact (de Brito, Carbone & Blanquart, 2008). In fact, textile manufacturing is argued to be one of the most polluting industries globally (Desore & Narula, 2017). Also, the impacts along the supply chains on social sustainability is also evident from literature. The relocation of production of textiles and clothing to Asia has made the supply chains global and far reaching (de Brito, Carbone & Blanquart, 2008), where the majority of workers within the industry are located in the countries of production. This relocation has occurred mainly due to the low wages and transportation costs which are possible to attain. The main social issues dominating the industry comprise poor working conditions, child labor, long working days etc. (Cleff et al., 2018).

2.2 Sustainability strategies

For the purpose of this study, the analytical framework consists of an empirical approach to sustainability in apparel and fashion studies, analysing the findings of this study in relation to the concept of sustainability strategies. Explaining the concept of sustainability strategies, the singular term strategy would also need a brief introduction. Porter (1996) gives one of the most commonly found descriptions of strategy as “representing company activities that fit together or a theory for creating competitive advantages” (p.68). This view of strategy emphasizes that
it comprises of activities that together form a unified view on how to create competitiveness of the business. However, another way to describe strategy from a business point of view is that of Teh and Corbitt (2015) that defines strategy as a “plan of action that defines the firm and allocate firm’s scarce resources, over time, to transform an organization from the present to the desired position” (p.40).

Sustainability strategies, in turn, are explained as sustainability practices and actions undertaken by companies that could be a source of competitive advantage and in turn ensure a company’s ultimately survival (Lloret, 2016). Indeed, striving for sustainability could generate unique opportunities for businesses, and especially so since it challenges them to improve by rethinking their business models in order to attain competitive advantages (Porter & van der Linde, 1995). The strategic development of sustainability in business could also be explained as a “corporate response to environmental and social issues caused through the organization’s primary and secondary activities.” (Engert & Baumgartner, 2016, p. 822). However, choosing a sustainability strategy is considered exceedingly challenging for companies, and the practical implications of this challenge is that there is no universal way to design a sustainability strategy, but it should rather be tailored to the specific circumstances for the company (Engert & Baumgartner, 2016).

In the context of apparel and fashion studies, sustainability strategy is a relevant concept, used by for example Caniato et al. (2012) and De Brito et al. (2008). Indeed, initiatives adopted by businesses as a response to sustainability issues has been argued to be of vital importance to their business strategies, not least those operating in sensitive business areas (Smith 2003). This has been argued to be especially true for the apparel industry, which is characterized by demanding consumption of natural resources and poor working conditions along the supply chains (Caniato et al., 2012).

2.3 Sustainability strategies in apparel

Han et al. (2017) argue that the apparel industry is currently undergoing a transformation where companies are incorporating sustainability practices in their corporate strategies. This transformation by apparel companies also extends to their partners and suppliers since the companies increasingly are being held responsible for the conditions under which their suppliers are operating (Caniato et al., 2012). Likewise, Da Giau et al. (2016) argue that fashion companies increasingly are taking action on environmental and social issues as a response to a new business context, where the consumers’ demands as well as concern for sustainability force companies to transform their way of doing business (de Brito, Carbone & Blanquart, 2008). Indeed, studies concerning consumer behavior and knowledge of sustainability in apparel and fashion show that this has become increasingly more prominent (Crommentuijn-Marsh & Eckertb, 2010; Ciasullo, Maione, Torre & Troisi, 2017).

The importance of both the environmental and social aspects for apparel companies’ strategic development is shown to have increased over time. As a growing public concern for environmental and social issues has evolved in regard to the industry, apparel companies are increasingly being held responsible for these issues that are caused by themselves directly, but also more importantly along their supply chains (Caniato et al., 2012; Desore & Narula, 2017). As a way to support the company’s brand image and sustainability strategy, companies communicate these as a response to the increased concern among stakeholders (Cervellon, Choi & Wernerfelt, 2012).
Previous studies on sustainability strategies within the apparel industry focus mostly either on strategies for “going green”, which is an emphasised label used in literature, or on the social aspects which has led to the concept of, for example, ethical fashion. Interchangeably with these, sustainable fashion has become a common concept in literature, and is sometimes used as a synonym to other concepts such as eco fashion, green fashion, and ethical fashion. Indeed, no common definition of sustainable fashion exists today (Henninger, Alevizou & Oates, 2016).

Sustainability has been described as an emerging trend within fashion studies, giving rise to an editorial on the issue by the *International Journal of Fashion Studies* in 2014 (Mora, Rocamora & Volonté, 2014). Through their overview of the present-day state of the literature on sustainable fashion, they argue that businesses are choosing to adopt sustainability strategies in one of two ways. Either focusing on technological innovation, or taking an approach focusing on “design as a factor of social change” (Mora, Rocamora & Volonté, 2014, p.140). They point out that a strategy only focusing on the technological aspect would be insufficient to solve the main problems of the sector, but that a design focus would entail and indeed require technological innovation as well. See below for an exploration of the two types of strategies.

### 2.3.1 ‘Technological innovation’ strategies

Mora, Rocamora and Volonté (2014) describe the approach of technological innovation as focused on developing procedures and technologies along the supply chains through innovation. An example of this strategic response is developing innovative technologies that address the stages of the cultivation of fibres, dyeing and treatment of fibres and yarns, transportation etc. Although this approach is argued to insufficiently address the macro challenges of sustainability in apparel, these types of strategies are argued to be the most common among companies. Ellen MacArthur Foundation (2017) argue that the increased efforts of companies to develop sustainability strategies have mostly been striving to reduce the negative impacts of the prevailing linear system (e.g. through production efficiency) instead of challenging the wasteful nature of the system through an upstream approach. This kind of other approach would instead be able to tackle the root causes of the “wastefulness”, i.e. low utilization of clothing items and lack of recycling of clothes after use (Ellen MacArthur Foundation, 2017). Likewise, Cleff et al. (2018) argue that fashion companies are mainly focused on adding technological innovations targeted at waste disposal or controlling emissions rather than using integrative innovations to make sustainable products more mainstream. Indeed, of all clothing companies globally, only one percent are using organic cotton in their products (Cleff et al., 2018).

Nonetheless, the types of strategies focusing on the technological innovations to improve the production-related sustainability performance remains the most typical (Fletcher, 2008). Indeed, Niinimäki and Hassi (2011) argue in a similar fashion that: “until recently, development in the textile and clothing industry has focused on technological and cost aspects” (p.1876). This is explained by different structural and legislative forces pushing and in fact reinforcing the status quo of industrial innovation and the prevalence of technological fixes (Fletcher, 2008). For instance, innovation has in many ways been driven by legislation, leading to a compliance-driven as well as reactive approach to innovation by apparel companies, implementing sustainability strategies as a response to the business threats of non-compliance (Fletcher, 2008).
2.3.2 ‘Design for social change’ strategies

As opposed to the technological innovation strategic approach, apparel companies have also been shown to develop sustainability strategies more in line with considerations of sustainability as a facilitator of social and cultural change through a design perspective. For example, as stated by Mora, Rocamora & Volonté (2014) “by using sustainable fabrics in mainstream collections, simplifying maintenance procedures such as cleaning or ironing, lengthening the fashion cycle of products, widening visions of beauty and fashionable styles” (p.140). Following this, sustainability is then not only a matter of reducing impacts from the production processes through the supply chain, but it challenges the entire social and economic system of how we design, produce and consume clothes (Mora, Rocamora & Volonté, 2014).

Likewise, Strählé and Müller (2017) argue that fashion retailers have the potential to promote sustainability both upstream towards manufacturers and producers, as well as downstream towards consumers. As there is an intricate but nonetheless mutually dependent relationship between production and consumption within the fashion system, the two sides should not be considered separately. Most developments of sustainability in the fashion industry is focused on the production side, but there is also an emerging strand of literature and an industry focus on consumer perspectives in the business context (Strählé & Hauk, 2017). To change the system, the contribution of the fashion companies is needed. Indeed, Tukker et al. (2008) argue that to foster a sustainable consumption and production development, “Green consumers and businesses, plus policymakers, should create the triangle of change” (p.1219).

In fact, there has been some research approaching the issue of sustainability in the fashion industry in a more holistic way, considering both production and consumption aspects connected to the design of the product. One of the earliest scholars taking this approach (Mora, Rocamora & Volonté, 2014) is Kate Fletcher, who explores the topic of sustainability in fashion from a “broad, pluralistic view of sustainability ideas, issues and opportunities in the fashion and textile sector” (Fletcher, 2008, p.12). For her, sustainability means designing clothes and regarding its whole lifecycle, from production methods, consumption and disposal. She argues that a major shift can be seen in the industry, where apparel companies increasingly put sustainability at the core of their business, and thereby move away from the compliance-driven response which has dominated up until recently (Fletcher, 2008).

Similarly, the emergence of the concept of circular economy has taken hold in sustainability debates within the apparel industry. The 2017 industry report “A New Textiles Economy: Redesigning Fashion’s Future” released by Ellen McArthur Foundation argues that the fashion and textile industry is undergoing a large-scale transformation towards circularity, and that this similarly is one of the greatest challenges for fashion companies going forward. This would entail strategies of recycling or upcycling clothes so that the textiles could be used again, either as new clothes or used as inputs for other sectors (Mora, Rocamora & Volonté, 2014). However, on a global level, only 1 % of clothes materials are currently being recycled into new clothes (Ellen MacArthur Foundation, 2017), which is explained to be due to immense complexities and difficulties in recycling fibres that maintain their function and quality (Fletcher, 2008).

2.4 Drivers for sustainability strategies in apparel

Sustainability strategies of companies could be adopted for a number of different reasons. The drivers influencing the decision to develop strategies for addressing sustainability issues are generally categorized as either internal or external (Caroll, 2000; Da Giau et al., 2016). These
drivers have the power and potential to influence the corporate strategy and thereby shape the practices of companies (Da Giau et al., 2016). Within the apparel sector, extant literature on drivers for sustainability practices of apparel companies show that the internal and external factors are in fact shaping the responses of firms (Caniato et al., 2012; Da Giau et al., 2016; Desore & Narula, 2017). However, literature is scarce, and several researchers point out the lack of insight in what motivates apparel companies to adopt sustainability strategies (Caniato et al., 2012; Strähle & Müller, 2012).

In their study of drivers for environmental sustainability strategies in the fashion industry, Caniato et al. (2012) consider these through the categorization as internal, market and law drivers. Firstly, internal drivers are usually related to an objective to increase efficiency in processes, or in other words to strive for cost reduction. It could also be drivers that relate to company-specific factors, such as corporate values, which is derived from the owner or top management. Secondly, the market drivers are the external pressures that companies experience as requirements from, for example, the customers or end-consumers. Thirdly, the law drivers are those regulations that affect the current and future legal obligations of companies (Caniato et al., 2012). Below, literature on the three different types of drivers in the apparel industry is discussed.

2.4.1 Internal drivers

Caniato et al. (2012) found that all fashion companies they studied mentioned the commitment of top management and/or the owner as a strong motivational factor for working with environmental sustainability. Additionally, Caniato et al. (2012) show in their study that the internal drivers are different depending on the company business models and their approach to sustainability. They identify two different groups of companies that they study: green international brands and small alternative firms. Their study shows that drivers among these two groups are different. For the green international brands, the main drivers influencing them are derived mainly from corporate values as well as from personal commitment of top management. In contrast, for small alternative firms the drivers are instead mostly explained by finding new ways for competition and differentiation in marketing their products.

Macchion et al. (2018) argue that another driver could be the top management’s commitment to incorporate principles of sustainability within the corporate mission of the company. Furthermore, they argue that the drivers for each company differ depending on their strategic approach to sustainability. For companies with a more proactive approach to sustainability, the drivers relating to the vision of the top management were stronger, whereas companies with a more reactive approach were driven by reduction of costs to a higher degree (Macchion et al., 2018). Indeed, internal drivers have been identified as important in previous literature on sustainability strategies or practices of apparel companies. The top management’s commitments have been shown to be a result of their ambitions to achieve new competitive advantage, opportunities, or in improving the reputation of the company, and also to improve on their cost reduction objectives (Da Giau et al., 2016).

2.4.2 Market drivers

Caniato et al. (2012) found that the sustainability strategies of fashion companies labeled as green international brands have recently been developed as a response to an increased awareness from consumers. Similarly, Macchion et al. (2018) argue that one of the most important drivers for the sector is the brand image concern toward consumers and other
stakeholders, particularly for those companies that have experienced previous accidents that had damaged their reputation. Indeed, Da Giau et al. (2016) argue that this is particular for the entire industry, and that the sustainability efforts of apparel companies are in fact highly driven by a desire to minimize the risks of damages to the public image of the company. A wide range of literature highlight this, especially concerning image problems deriving from social issues dominating the supply chains in the apparel industry (Da Giau et al., 2016; Macchion et al., 2018; Cervellon & Wernerfelt, 2012).

For the apparel industry, it is common for NGOs to exert pressure on companies and pressuring them towards adopting new sustainable practices, for example through initiating boycotts of companies that do not recognize their role in fighting for better work conditions in the supply chain. Furthermore, companies that do not publicly report on their efforts are particularly susceptible to these attacks (Da Giau et al., 2016; de Brito et al., 2008). The long-term sustainability strategy of apparel companies is argued to be important to support companies’ brand image (Macchion et al., 2018). Indeed, for companies with a proactive approach to sustainability, the enhancement of the brand awareness is a key driver. Furthermore, Strähle and Müller (2017) study the drivers behind fashion retailers to “go green”. They consider the fact that the fashion retail has increasingly become more and more competitive, which has led to the strategic response of firms trying to differentiate themselves through developing their business models. They argue that fashion retailers ought to strive to understand trends of sustainability within the sector as well as industry-specific consumer insights in order to achieve market competitiveness.

Furthermore, the external pressure from consumers has also been shown to be of great importance for fashion companies recently (Strähle & Müller, 2017). A trend of an increased interest for sustainability among consumers is evident, and there has been an increased awareness of the negative impacts of the system (Macchion et al., 2018; Ellen MacArthur Foundation, 2107). The expectations on sustainability within the sector from a consumer point of view usually highlight the fact that the retailers and brands should be the guarantors of sustainability (Mora, Rocamora & Volonté, 2014). However, as many researchers emphasize, most consumers are not sensitive to sustainability issues when it comes to the purchasing decisions, and other factors play a more important role, such as fit, style and price (Mamoq, 2018; Crommentuijn-Marsh & Eckertb, 2010). In fact, in many cases, researchers argue that the role of apparel companies rather have become to educate the consumers on sustainability aspects of their products (Cervellon & Wernerfelt, 2012). Through marketing and storytelling campaigns, companies can influence the behavior of the consumers (Cleff et al., 2018).

2.4.3 Law drivers

All fashion companies that were interviewed in the study of Caniato et al. (2012) wanted to go beyond current regulation affecting their sustainability efforts. The implication, therefore, was that current laws as well as anticipation of future laws does not act as a sufficient driver for these fashion companies and does not significantly influence the development of their environmental sustainability practices. The explanation the researchers give for this is because of the lack of legislation in the apparel and fashion industry, with existing regulation only focusing on some specific aspects, e.g. pollution to air or to water (Caniato et al., 2012). Of course, their research focuses only on the environmental side of sustainability in the sector, which limits the perspective. However, legislation has previously been argued to be of importance as a driver for innovation in the industry, and in particular for sustainability (Fletcher, 2008).
2.5 Barriers and challenges for achieving sustainability in apparel

In literature on sustainability in apparel, barriers and challenges are sometimes used interchangeably with each other (Strähle & Müller, 2017; Pedersen & Andersen, 2015). Barriers are typically described as factors that limit or impede companies to implement their sustainability strategies (Macchion et al., 2018). In the context of apparel however, the barriers could also be articulated as challenges impeding the sector in creating change towards sustainability (Strähle & Müller, 2017). Therefore, both terms are addressed in this study.

Research on barriers from an apparel company perspective gives insight in what hinders the implementation of sustainability strategies of clothing companies. In their research, Pedersen and Andersen (2015) found a general challenge of the industry to be the problem it faces regarding the image of being unsustainable and irresponsible. The efforts of apparel companies in trying to address the issues of sustainability are regarded as unsatisfactory since they are not targeting the underlying problems. For example, they argue that efforts of some market leaders in fashion seem mostly focused on reducing their negative impact in only a few certain selected aspects instead of making a more significant change towards sustainability (Pedersen & Andersen, 2015). Furthermore, they found that their participants articulated barriers that relates to both upstream and downstream aspects of sustainability. The lack of transparency in the supply chains is emphasized as a significant barrier upstream, while for downstream barriers you find overconsumption as the most significant (Pedersen & Andersen, 2015). Indeed, these have been identified by other researchers as great challenges for the sector in achieving sustainability. Strähle and Müller (2017) argue that the complexity of supply chain actors, as well as complex and global systems of manufacturing and distribution of the products makes having full visibility and transparency as a fashion retailer difficult. Furthermore, Macchion et al. (2018) argue that one of the major barriers of the industry is the high costs of sustainability projects. This, in effect, hinders the implementation of sustainability strategies and might cause a delay of results or less commitment from the top management.

Technological challenges have also been argued to concern the issue of recycling textiles and fibres, which is mostly expressed in connection with discussions on circular economy (Ellen MacArthur Foundation, 2017). Fletcher (2008) argues that there are relatively few clothes made from recycled materials on the market, which reflects the prevalence of low-cost virgin fibres as well as a lack of technological innovation for recycling of textiles. However, she noted that this had begun to change, and, more recently, Cleff et al. (2018) argue that we have seen an increase of innovation projects focusing on the technological aspects of recycling fibres from old clothes, although the process is slow and still rather new. Nonetheless, this technological limitation remains one of the biggest sustainability challenges of the industry, where in particular the complexity of product designs is added in as a major challenge for recycling, since recycling requires separation of different types of fibres (Govindan & Hasanagic, 2018).

2.6 Sustainability in the Swedish apparel industry

For the Swedish apparel industry in particular, research on the topic is rather limited, but a few reports and studies do indeed focus on the issue and are discussed shortly below.

In general, it can be seen that the issue of sustainability in the Swedish apparel industry is a relevant topic currently, and it has also been identified by the government as an important area for further research and action. This can, for example, be seen in that the Swedish Environmental Protection Agency Naturvårdsverket are currently in the process of realizing a
mission from the government on achieving a sustainable consumption of clothes in Sweden, due for a partial report in 2019, and latest in 2021 a report on the overall mission (Naturvårdsverket, 2019). They have conducted a consumer study on behavior, attitudes and knowledge on sustainable textile consumption, which concludes that there is an increased interest in sustainability today among consumers, and that many consumers state that they can consider changing their behavior to some extent towards sustainability. However, the study also shows that the knowledge level is generally low, and that the demand for easily accessible information on sustainable textile consumption and the environmental and health impact of textiles is high (Naturvårdsverket, 2018). Even though the interest for sustainable fashion thereby seems to have increased lately, the Swedish consumption of clothes and textiles has increased tremendously over the past decades. The average Swede consumed 14 kg of clothes and other textiles in 2017 (excluding e-commerce), where more than half is then thrown away rather than reused or recycled (Naturvårdsverket, 2019).

A survey study with 400 Nordic fashion companies shows that working with sustainability is generally a question of compliance rather than having a more proactive approach. However, they conclude that more companies are indeed considering proactive and opportunity-seeking strategies on sustainability, due to increasing stakeholder pressures (Pedersen & Gwozdz, 2014). More directed towards the Swedish market, a pilot survey study conducted in 2016 shows that sustainability is an important aspect of business in the Swedish fashion industry today, where the majority of fashion companies participating in the study answer that they work with sustainability in their different processes, e.g. design, product development and production (Tillväxtverket, 2016). However, the focus on circularity and sustainability-related services in their businesses are only evident among a minority of companies. What this pilot study also shows, is that for larger companies, both the external and internal pressures seem to push them to work more with sustainability. In particular, pressure from the owners and from employees are argued as being potentially more important. The quantitative study was however based on a rather small sample, and the authors urge for caution to draw any final conclusions from its results (Tillväxtverket, 2016).
3. Materials and methods

This section aims to give a comprehensive overview of the methodological stance and process of the study, explaining the selected research approaches and data collection, as well as a critique of method choices and implementation of them.

3.1 Scientific approach

3.1.1 Research design

This thesis utilizes the qualitative approach as a research strategy in order to fulfill its aim. Qualitative research could be described as “a holistic approach that involves discovery” (Williams, 2007, p.67) According to Bryman and Bell (2015) this typically entails a study centering around the questions of “what” and “how” in order to describe and explain as well as interpret the data that is being collected. Qualitative research could also be described as striving for reaching an understanding of a phenomenon, where the context of it is acknowledged and of interest (Yin, 2014). In contrast, the quantitative approach is generally used more to generalize results from a sample to a population, e.g. through a statistical or numerical analysis of data (Bryman & Bell, 2015). For this reason, the qualitative approach is most suited in order to get a deeper understanding of how the selected apparel and fashion companies are working with sustainability issues and to understand their strategic reasoning. Because of the relatively limited amount of scientific research on the topic, the qualitative approach also allows for new themes and aspects that are not previously identified by literature to arise (Bryman & Bell, 2015).

The qualitative approach of this study is utilized through conducting semi-structured qualitative interviews with people working within the field of research. Conducting interviews is indeed a common method in qualitative research (Bryman & Bell, 2015; Creswell, 2014). Thus, the study will be based on insights from different actors working in the same field but where they will contribute with their perspectives and knowledge, which derives from their specific work role. This will contribute to shedding light on the specific phenomenon under analysis, specifically, sustainability strategies in the apparel industry.

3.1.2 Inductive theory

Bryman and Bell (2015) state that there are different approaches on how to relate the research to theory. The inductive strategy entails a relationship where “the researcher infers the implications of his or her findings for the theory that prompted the whole exercise. In other words, the findings are fed back into the stock of theory” (p.23). For this thesis, the chosen approach is inductive, which means that the purpose is for the observations to contribute further to the stock of literature, which is drawn upon here in order to improve our understanding of the topic of sustainability within apparel and fashion literature. As mentioned previously, because of the research design, the empirical findings of this study should not be thought of as generalizable to the population. However, according to Yin (2014) the goal should instead be to expand and generalize theories, which can be explained as striving for analytical generalizations that can be lessons learned in a larger setting.
3.1.3 Selection of topic and literature overview

The topic was approached from an interest in sustainable fashion, and the scope was decided upon after an initial search of literature in the field. This first step is crucial in order to be able to conduct a high-quality study (Creswell, 2014). A more thorough and systematic search for literature was thereafter conducted, and this was done based on keywords and terms which were identified through the initial search. Bryman and Bell (2015) claims that it is important that this search is unbiased as well as being comprehensive. To achieve this, literature was searched for in multiple databases and a combination of different search terms were used. Later, the search results were examined in regard to relevance to the aim and research questions, and literature not in line with those were discarded. Furthermore, Bryman and Bell (2015) argue that “the aim of the analysis of literature is to achieve a cumulative understanding of what is known about the subject” (p.108), which likewise was the purpose for this thesis.

Keywords that were used in this study were the “synonyms” apparel, fashion and clothing, that generated the basis for the search, in combination with the terms: sustainability, sustainability strategies/strategy and drivers/barriers/challenges. The additional search term sustainable fashion was also included. From this search, the studies that were included in the background were both empirical studies and article reviews that had relevance for the research questions of the thesis. The snowball search technique based on these defined search parameters was also used, which added some new material that created a more extensive overview of the field of research (Bryman & Bell, 2015).

Since this study is mostly based on inductive theory, the literature overview is used both as a way to frame the problem but most importantly it is used to compare and contrast the results, an approach favored by Creswell (2014). The exploratory nature of the data collection was informed by the literature, but the main aim was to gain new knowledge on the topic through using open-ended questions, but exploring the themes previously identified by the author. Therefore, there are also some elements of deduction in this study.

3.2 Materials

3.2.1 Empirical material

The empirical material of this study is interview material as primary data. According to Rowley (2012), conducting interviews as a method for collecting materials is typically found in qualitative research where the researcher “is interested in collecting “facts”, or gaining insights into or understanding of opinions, attitudes, experiences, processes, behaviors, or predictions” (Rowley, 2012, p.261). Furthermore, Starrin and Renck (1996) argue that the goal of the qualitative interview is to identify or discover not-previously known or unsatisfactory known phenomenon (p.54). Due to the scope of this work, qualitative interviews are deemed as a suitable method for data collection. An option that was considered was to also include secondary data in the form of e.g. sustainability reports of the apparel companies that were included in this study. However, this was deemed problematic due to the available material being too scattered, with low levels of comparability between companies both in terms of availability of sustainability reports and in terms of information available on company websites. Therefore, this option was in the end judged to not be beneficial enough for the aim of the thesis in relation also to the time constraints of conducting the study.
Two types of respondents were chosen to participate in this qualitative study, namely sustainability managers of apparel companies and consultants working in the field of sustainable fashion. These were considered relevant for the study because of the different perspectives and insights they would have depending on their work role. The purpose of interviewing sustainability managers at apparel companies was to provide input on the strategic choices and sustainability efforts of the particular company, while the perspectives of both sustainable fashion consultants were expected to provide insights in trends and challenges through their broader and system-wide knowledge in the industry. The differing focuses of the interviews with the two types of respondents is considered to add more dimensions and depth to the analysis. Nevertheless, every interview was conducted to make sure to be incorporated and add value to all three research questions.

3.2.2 Selection of respondents

The respondents were chosen through generic purposive sampling, a method defined by Bryman and Bell (2015) as “a form of purposive sampling, criteria are put a priori and are fixed, based off and informed by the research questions.” (p.429) The goal was to choose respondents in a strategic manner that served the purpose of the study, which means that the criteria are set to ensure relevance of respondents to the research questions. Through this method, as Bryman and Bell (2015) states, the non-probability approach of sampling does not allow for a generalization of results to the population. Therefore, for this thesis, the emphasis is placed on purposive rather than on sample, and through the reasoning of Yin (2014) the respondents were chosen with the purpose of shedding empirical light on the theoretical foundations of this study.

The apparel industry is very heterogenous and diverse and with companies of different sizes and commitment to sustainability, operating in the traditional system, or on a niche market. This makes sampling for a representation of the sector in its whole difficult. Thus, the aim of the selection was to get insight from companies and consultants of a wide range, but all should fulfill the set criteria, which relate to sustainability commitments and knowledge in the field. The representation of apparel company respondents was initially meant to be broad, to strive for contrasting perspectives on sustainability in regard to clothes and fashion. However, due to few responses and agreements to interviews, the participating respondents are limited in both numbers and in variety.

Thereby, the insight from sustainability managers at three Swedish apparel companies participating in this study is considered to still serve the purpose of providing insights on sustainability issues in accordance with the aim of this work. The companies are all well-known brands of clothing (although all have additional products in other product categories than clothes) companies with a public commitment to sustainability. The selection criteria were as follows.

Company selection criteria:
- Operating in the sector of fashion and apparel
- Headquarter in Sweden
- Owning their own brand
- Public commitment to sustainability

Consultant selection criteria:
- Working as consultants in the field of fashion and apparel
- Work role specific to sustainability within the industry
For the respondents from apparel companies, the sustainability managers were selected as being in a relevant position because of their key role and insight in the sustainability initiatives of the company. In addition, consultants working in the field of sustainable fashion were selected as a relevant group to interview because of their role as business advisors for fashion and clothing companies, which would provide further insight on the topic (Han et al., 2017). All respondents were contacted through e-mail, phone or LinkedIn.

### 3.2.3 Description of respondents

The companies were chosen in accordance with above-mentioned criteria and are all operating in the global production and distribution system of apparel and fashion products. All three companies are defined as small and medium-sized enterprise (SME) according to the definition used within the EU (European Commission, 2019). The apparel company respondents have similar positions at their respective company as sustainability managers. Furthermore, both sustainable fashion consultants have been identified to have worked within the field for some time to ensure their knowledge and experience of the central concerns of this study.

All respondents are found in the table below, with their respective position and company.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Company</th>
<th>Description of company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christiane Dolva Törnberg</td>
<td>Sustainability manager</td>
<td>Fjällräven</td>
<td>Swedish brand in outdoor clothing and equipment (Fenix outdoor, 2017)</td>
</tr>
<tr>
<td>Åsa Andersson</td>
<td>Quality- and sustainability manager</td>
<td>Peak Performance</td>
<td>Swedish sports- and outdoor apparel brand (Peak Performance, 2018)</td>
</tr>
<tr>
<td>Mona Lindskog</td>
<td>Quality- and sustainability manager</td>
<td>Indiska</td>
<td>Swedish lifestyle company (Indiska, 2018)</td>
</tr>
<tr>
<td>Sigrid Barnekow</td>
<td>Consultant in sustainable fashion, former program director of Mistra Future Fashion</td>
<td>-</td>
<td>Mistra Future Fashion is a Swedish research programme for a sustainable fashion industry (Mistra Future Fashion, 2019)</td>
</tr>
<tr>
<td>Sustainable fashion consultant</td>
<td>-</td>
<td>Independent organisation, within the Swedish fashion industry</td>
<td>-</td>
</tr>
</tbody>
</table>

### 3.3 Interviews

Five semi-structured interviews were conducted over a period of three weeks. The semi-structured interviews were chosen because they allow for a higher degree of flexibility, as opposed to the structured ones (Bryman & Bell, 2015). For all interviews, an interview guide was utilized as suggested by for example Trost (2010). Two separate sets of interview guides were used in order to embrace the different perspectives and specific knowledge in the field that they have, which in part depends on their role as either sustainability manager at an apparel company or as consultant working with different types of actors in the field. Central themes
and questions of the study were the same across the two groups for comparability purposes, and in order to inform all research questions. The interview guides for the sustainability managers and consultants are found in appendix 1 and 2, respectively.

All respondents were given essential information about the topic, aim and focus areas of the study before the date of the interviews. This was done upon request of a few, as well as through the initiative of the author in order to ensure a more meaningful conversation with possibility of preparations for both parts. Furthermore, all interviews were audio-recorded with the respondents’ direct approval, in order to facilitate an accurate transcription of all material, which is supported by Bryman and Bell’s (2015) claim that this is crucial for conducting a correct and detailed analysis. However, the main disadvantage of this approach is that the respondents may feel uncomfortable being recorded, which in fact was expressed by one of the respondents in this study. The benefits were however deemed to outweigh the potential drawbacks, but this nonetheless remains as a limitation of the study.

Four of the interviews were done in a personal meeting, and one interview was conducted over Skype due to logistical and time constraint reasons. Conducting interview through Skype has increasingly become more common, and recent research have concluded that it is indeed a valuable tool for researchers in that it facilitates new opportunities to bridge geographical and resource limitations (Iacono, Symonds & Brown, 2016). The main advantages from face-to-face meetings, such as for example being able to read body language and to get a personal connection, is still relevant since it is a visual tool, as opposed to e.g. telephone interviews (Bryman & Bell, 2015).

3.4 Method of analysis

The interview material was audio-recorded and precisely transcribed (with correction of grammatical errors) in order to not lose sight of details and to be able to correctly recall what had been said during the interviews. When analyzing the data, a qualitative content analysis was conducted, which according to Bryman and Bell (2015) is a method where the underlying themes of the material are sought after. The interview material was accordingly categorized from the concepts and themes identified through the previous research presented in the background section of this thesis. Thus, the empirical material was analyzed from theories on sustainability strategies, their drivers as well as barriers and challenges for achieving sustainability in apparel. This is expected to contribute with a deeper understanding of how apparel companies are shaping their business through working with sustainability issues. To ensure that the material was correctly reproduced, the transcribed material was re-read upon thematization and analysis.

Furthermore, all respondents were contacted and asked to approve the quotations used so to ensure no misinterpretation had occurred. Likewise, for three of the respondents, all written text deriving from interview material was sent for their approval upon the request of these respondents. To offer respondents a chance to edit their answers could however be problematic, since the material can be changed in such a way so that it is “corrected” with afterthought, more to the liking of the respondent. Therefore, this was done carefully, and corrections were only approved where the content was judged to be of similar form as what had been stated during the interviews, or when some misinterpretations had occurred, which did not happen to a large extent. One respondent could not be reached for approval, which led to the author taking the decision to make them anonymous.
3.5 Ethical considerations

In this study, a number of ethical considerations regarding the process of conducting the study have been taken. Firstly, when the respondents were approached for participation, the purpose of the thesis as well as the purpose of their own participation was disclosed to them both at first contact and at the time of the interviews. According to Creswell (2014) this ethical issue is crucial in order to avoid deception towards participants. The purpose of their contribution should be clearly stated and should give the participants enough information to make an informed decision on whether to take part or not (Bryman & Bell, 2015).

Secondly, all interviews were recorded upon given verbal consent from the respondent at the time of the interview. Information on personal data processing was given to them verbally at the time of consent, and consisted of a description of what their participation would entail in regard to data processing, how the data would be used as well as stored, who would have access to the data and what their legal rights are in terms of consent and right to withdraw consent.

Lastly, issues of protection of identities and confidentiality, such as disclosure of name, company name, and finalized findings derived from the interviews, were dealt with at the time of the interviews, and also confirmed later via e-mail with all respondents. According to Creswell (2014), the ethical issue of respecting the privacy of participants is important, as well as the issue of exploitation of participants, which the researcher can address by for example sharing the finished report will all participants. For this purpose, and from the interest expressed by the respondents themselves, this report will be sent to all respondents.

3.6 Limitations

The major limitation of this study is the limited number of respondents that makes up the empirical material. According to Yin (2014) this is indeed an inherent risk with qualitative research, since the empirical material could be too biased from the opinions of the respondents. In the case of this study, the insights from the five respondents are regarded as providing sufficient material to be able to shed light on the topic, and thereby answering the research questions. However, in order to increase the reliability of the study, more respondents could have been included, but due to lack of time and interest to participate, this was not possible. A large number of people were indeed contacted and asked to participate. The number of responses to this initial contact was generally high, but many people unfortunately expressed that they would not have the time to be interviewed.

Another limitation of this study is that the interviews were conducted in Swedish, and later transcribed in Swedish, while all accounts found in the results had to be translated to English. Bryman and Bell (2015) does state that this indeed could affect the interpretation of the results, since meanings can get lost or misinterpreted in translation. To work around this limitation, all direct quotes found in this report were sent for approval by the respondents. Also, with this in mind from the start, the translation was conducted carefully, with respect of the respondents and was later in the process cross-checked with the original transcripts to avoid false or misleading statements. Three of the respondents also wanted to corroborate and approve all mentions of them in the text, as mentioned before, which lessens the risk of misinterpretations (Bryman & Bell, 2015).
4. Results

This section presents the empirical results from the interviews with sustainability managers and sustainable fashion consultants. The results are presented following the structure of the research questions as well as themes that were identified through the analysis of the empirical material.

4.1 Sustainability strategies

4.1.1 Sustainability

Sustainability in relation to fashion and apparel is argued to be a broad and highly complex issue by all respondents. They agree that sustainability in the industry has come to incorporate a wider range of aspects than before. The sustainable fashion consultant explains that the concept of sustainable fashion is very broad today and that it entails looking at how and where clothes are produced, from both an environmental perspective and a social perspective, which has become an increasingly important aspect of sustainable fashion. He or she reflects further that discussions previously may have stopped after organic cotton or child labour, but have now been expanded to include more dimensions such as how products are transported, how clothes are consumed overall or how collections are built and designed. Likewise, Sigrid also emphasises the complexity of sustainability concerning clothes and fashion. She describes it as a large and complex issue that has gained importance over the last few years, where more people have become committed to it. She argues that the reason for why it is so important for the sector is because of the great impact it has on the environment and the climate. However, she argues that it is still very much a niche market to work with sustainable fashion. And even though more and more companies are talking about sustainability, she argues that sometimes this might be mostly founded on claims of quality, which she thinks is not enough. She argues that sustainability is also, for example, very much about transparency, and about helping the consumers and guide them in taking care of their old clothes.

The sustainability managers each raised different perspectives on sustainability regarding how they consider it in relation to their business. Christiane describes the sustainability of Fjällräven as being about long-term business development which entails both risk management and using the potential that they have identified as demand on the market for sustainable products and/or services. For them, sustainability is highly connected to their vision as a company, and they work with sustainability across all processes of the company. However, Christiane explains that their perspective on sustainability has evolved over time, and she expresses her view of what sustainability is for them as:

“And then it is to minimize our negative impact, but also for us very much about the positive impact that we consider in relation to getting more people out into nature. We believe, and a lot of research shows that, if you are out in nature, you will also become more concerned about working to protect it.”

Christiane Dolva Törnberg, sustainability manager, Fjällräven

For Indiska, Mona describes that due to a recent re-organisation of the company, they have started to work with sustainability in a different way through releasing their first sustainability report in 2018 and setting new targets for sustainability. She explains, however, that sustainability for them is at the core of what they do, and they have always worked with
sustainability as part of their business. Åsa, in turn, explains that the sustainability strategy of Peak Performance is based on three different focus areas, which are themselves as a brand, their products and their suppliers. She explains that their sustainability work has developed over time and has been established within more functions of the organisation today, and that they are also working more together with others in order to achieve new goals, especially regarding their current commitment to climate action. Indeed, she mentions that they are one of the apparel companies that have signed the UN Fashion Industry Charter for Climate Action, as well as being part of a Swedish initiative where Peak Performance pledge to reduce their emissions by 30% in 2030.

What all sustainability managers seem to have in common is indeed their view of sustainability as closely interlinked with their corporate values, and that these seem to have guided the direction of the sustainability work. However, they all seem to have developed a more holistic approach to sustainability as they evolve in working with these issues, especially concerning the product perspective. This was specifically expressed by Mona who explains that:

"We look at sustainability holistically, to see to the whole product and production from a sustainability perspective."

Mona Lindskog, sustainability and quality manager, Indiska

Indeed, the focus on the sustainability of processes and materials of their products were evident among all three respondents. This indicates an emphasis on the environmental aspects in the production phase, although both Christiane and Mona argued that compliance on social aspects was also central to their efforts of sustainability in the supply chains. Mona explains that for Indiska, their sustainability work today is indeed a lot about product development, to increase the amounts of sustainable and recycled materials and reducing the impacts of production processes, but also in terms of compliance along the supply chain regarding safety and labour rights. For example, she explains that they are in the process of deciding on goals of how often they should visit the factories, which depends on where they see that they have the largest parts (and largest impact) of their business. However, she also explains that a large part of their sustainability work apart from these aspects is the importance of social involvement and women empowerment. As an example of this, she describes their engagement with the organization Peace Trust, through which Indiska supports educational programs for youths in India, as well as selling hand-made greeting cards in their stores which provides an extra income for the women who make them.

### 4.1.2 New business models

A common theme that was found with several respondents was the trend towards an increasing amount of new business models entering the market. Both consultants expressed that there are a lot of interesting newly-founded companies today that approach sustainability through focusing on remakes or renting of clothes instead of the traditional producing-selling model, which they see as an exciting development on the market. Sigrid argues that this is a reflection of an overall trend towards a more service-based economy, but that many in the fashion industry are still not involved in this development. However, she argues that the rise of these new business models will probably affect the market more and more. Sustainability is still viewed by her to be a niche, only of interest for a small number of consumers that seek out alternative ways of consuming clothes. However, she explains that there are opportunities for the proliferation of these new ways of doing business:
“But hopefully it will go from being a niche to that when you go and shop somewhere you can also rent at the same place. And you do not think that you are doing it based on that you should be nice to the planet but rather because you see that it is a very suitable alternative to the activity you are going to do.”

Sigrid Barnekow, sustainable fashion consultant

Interestingly, two of the sustainability managers expressed their interest in these opportunities as well. Christiane mentions that they are looking at what is happening on the market, and that they are indeed discussing opportunities to expand their business to also include a service-approach such as renting of clothes. Similarly, Mona explains that they have previously tried selling used clothes, but it was difficult to make it profitable at that time. However, she also says that they have started looking at new ways to do their business today based on recent developments on the market. Renting clothes was also mentioned by her as a possible venture. This seems to indicate a belief that changes in the market demand would provide a better opportunity to make it profitable today. Indeed, Sigrid argues that there are companies in Sweden today that have the ‘traditional’ model that have tried different approaches, e.g. second-hand or renting out clothes. However, she argues that the demand is still lacking and that there is need for a multitude of factors helping the consumers realize their role and to change their behaviour. And because of this, the individual companies cannot change the entire system by themselves, according to her.

4.1.3 Product development and circularity

For the three sustainability managers, product development was something that was continuously mentioned when discussing sustainability. They all expressed that the durability and high quality of their products are incremental aspects of their sustainability work. The quality perspective was emphasised especially by Åsa in regard to the sustainability work of Peak Performance:

“We have had a high approach to quality ever since we started our company in 1986. [...] We have from that perspective always talked about sustainability, when making a strategy for our CR work it was quite obvious that high quality and longevity was important for us and already in focus.”

Åsa Andersson, sustainability and quality manager, Peak Performance

Furthermore, all of them argue that they do not design clothes according to fast fashion cycles and that the durability of their products is key in their sustainability efforts. This seems to indicate a common view that fast fashion trends are a threat to sustainability, but that their businesses are not directly related to this issue. The ‘timeless design’ and durability of their clothes was indeed maintained as a response to the challenges of overconsumption, discussed further in part 4.3.3.

The focus on organic materials as a strategy by apparel companies to be more sustainable was discussed with the sustainable fashion consultant, who argued that organic should not be the only criteria for sustainability, since there are challenges with those materials as well, for example with organic cotton that requires more land and grows slower than conventional cotton. In response to this, all sustainability managers at the apparel companies argue that they take a wider approach to product development in regard to sustainability, both looking at the use of more sustainable materials and more sustainable production processes. As an example, increasing the use of sustainable materials as well as recycled materials in their clothes was
maintained by Mona as key efforts of the sustainability of Indiska. She explains that they work a lot with natural materials, such as viscose for example, which they see as important for their consumers as well as for the environmental benefits it brings, e.g. concerning leakages of microplastics from polyester.

However, another aspect of product development was raised by Mona, who explained that they work with these issues also when designing the clothes, in that they strive to design products that should be possible to recycle. Mona was the only one to raise the issue of designing products with recycling in mind. In addition, Åsa mentioned for their case, that Peak Performance has a left-over process, where they are working with closing the loop and using the left-over material from their production again. The issue of recycling of clothes was, however, discussed by all respondents, and especially so by the consultants. The innovation aspect was here held as a central issue, where they seemed to share a similar view of innovation as a solution for the issue of clothing waste in the industry. The common stance for the sustainability managers on the issue of recycling was that it is something they all work with, but it remains a challenge for them to fully integrate it into their business. However, Mona explains:

"Recycling of textile materials is limited today, but there are many projects going on, especially for cellulosic fibres like cotton and viscose. We are following the development and aim to work more with recycled materials when the technology exists in a larger scale."

Mona Lindskog, sustainability and quality manager, Indiska

This indicates the same issue that both consultants maintain, in that the technology exists today but is only available on a small scale. Sigrid argues that one large trend of sustainability is indeed the focus on innovations as a way to solve some of the major sustainability challenges and help transition to a circular apparel industry. She explains that innovation has been a lot about developing sustainable materials, but also increasingly focusing on the recycling of the materials, which she argues is really difficult to do today. She argues that achieving a circular economy of clothes is a suitable framework for sustainability, because this entails being able to produce clothes and still be able to use them for as long as possible and in the end put them back into the system. Likewise, this was also argued by the sustainable fashion consultant, who shared the view that an important topic at the moment is circular business models in combination with innovative materials that have a lower environmental impact, where he or she also argues:

"It doesn’t really matter how sustainable a product is made if it is only used a couple of times and then thrown away."

Sustainable fashion consultant

4.1.4 Mobilisation and collaboration

Another theme that could be identified in terms of how apparel companies are organising and structuring their sustainability efforts, and in turn their strategies, was the trend towards collaboration within the industry. In particular, the collaboration between competitors on the market, i.e. apparel companies, but also collaboration between different types of actors, for example between the apparel companies and research institutions. Several respondents argued that collaboration and mobilisation on a national, but also global, level is something that has increased lately, and that there are a great number of networks in Sweden concerning different aspects of sustainability. All sustainability managers mention the importance of collaboration
but give different perspectives on what benefits they see in collaborating. Christiane argues that collaboration is indeed very important, but that they collaborate with others mainly because it is easier to solve a challenge together with others. This perspective was emphasised by both Åsa and Mona as well, but they, in turn, argued further that they also see other benefits to collaborate, such as building networks to be able to support each other with knowledge on regulations, new advances in research as well as collecting other types of information that is difficult to get hold of as an individual company. Mona explains from her perspective at Indiska that they work with other Swedish brands in different initiatives, and that together they can make a difference. Furthermore, Sigrid, from her perspective as a consultant and a former program director of Mistra Future Fashion, echoes the same belief, that actors have to come together in order to solve the major challenges in the industry. And this, she argues, is already being done to a great extent, and that the possibility for competitors to collaborate on these issues is indeed necessary and positive for achieving change in the industry.

4.2 Drivers for sustainability

From the interviews with the five respondents, a number of drivers particularly relevant for Swedish apparel companies have been identified. The drivers that have been identified through the interviews are:

- negative impact on society and environment,
- brand identity,
- engagement from top management and/or owners,
- employee expectations,
- business to business (B2B) partners,
- consumer demand,
- long-term business development, and
- regulations.

These are presented in detail below.

One of the major drivers for sustainability at Peak Performance, explains Åsa, is the significant environmental and social impact they, as a textile company, have. They acknowledge that they have an important role in ensuring that their products are produced responsibly, which is also reflected in their strive to minimize their negative impact, as they also aim to grow as a company. Likewise, Christiane argues that the global importance of sustainability issues induces an awareness in that considerable measures are needed. Additionally, the general climate debate in society was regarded by all three sustainability managers as particularly relevant at the moment. Also, some respondents mentioned that the increased focus on the climate has affected the industry actors in textiles and fashion, pushing some companies to increase their efforts even more. Christiane explains this as:

“There is a sense of urgency in terms of climate, where you cannot lean on ‘baby steps’ or constant improvements over time, you must go in and take a much bigger collective approach.”

Christiane Dolva Törnberg, sustainability manager, Fjällräven

Furthermore, when asked about the reasons why they work with sustainability, the sustainability managers at both Indiska and Fjällräven describe sustainability as an integral part of their business. Mona describes sustainability as a part of their DNA and argues that it has
been an important part of Indiska since they were founded. It has always been important for them to do business in a fair way and have good relations with their suppliers. Likewise, Christiane describes sustainability as something that Fjällräven has identified as important for their long-term business development and it is also closely linked with their care for nature, as mentioned before. Furthermore, she describes that their mission is to get more people out in nature, and that their vision is to become the most premium and sustainable outdoor brand globally.

Mona explains that the interest and engagement from the top management and from the CEO of Indiska regarding sustainability is strong, which supports the development of their sustainability efforts. Their CEO is particularly engaged in women empowerment, which likewise is something that is important for them as a brand and is a central aspect of their sustainability work. For Fjällräven, the engagement of the top management is also evident, where Christiane explains that the lack of engagement from them is not a barrier but rather the opposite, in the sense that they are in fact very engaged in developing their sustainability strategies. Likewise, the sustainable fashion consultant argues that an interest from the top management is a crucial aspect in order to work with sustainability successfully and to make it integrated into all parts of the business. Furthermore, in regard to Peak Performance and Fjällräven, both brands have group level owners, which is argued as being a relatively important driver for sustainability for them both. Christiane mentions that there are expectations from their owners that they work with and subsequently live up to and act according to their commitment to sustainability. Likewise, Åsa also mentions that Peak Performance experience some pressure from their owners regarding working with sustainability, although she argued that there are other factors that motivate them as well, more significantly in recruiting new employees.

All three sustainability managers mention the expectations from their employees as an important driver for sustainability. In particular, Indiska and Peak Performance stress that in the recruitment of new employees, sustainability has become an important factor that potential employees consider when they look for jobs. Åsa explains that this is evident in their case, where many of the people who apply for a job there ask questions about how they work with sustainability. At Indiska, they also recognize that this has become a significant issue of recruitment, where Mona explains that they believe that it is important in order to recruit talented and committed people since it has become decisive for more people to work at a company that thinks sustainability is important.

Both Åsa and Christiane mention their B2B partners as important drivers for sustainability. Åsa says that it has become more and more common for their B2B partners to come with a code of conduct (e.g. regarding social aspects of production or product certifications) that Peak Performance have to live up to in order to deliver products to them. Christiane explains that one of the reasons why they are working with sustainability is that they believe that it is good for their customers’ business. Fjällräven recognize that there is a market demand for sustainable products, and therefore they supply their retailers with products that are attractive on the market.

All three sustainability managers maintain that market pressures have increased recently, over the past five years or so, but the degree to which they view it as a relevant driver for their sustainability efforts vary. Interest from consumers as a driver for sustainability was particularly articulated as relevant for Fjällräven. When Christiane answers the question of why they are working with sustainability, she expresses a belief that their retailers in fact experience a demand from consumers that are aware of sustainability issues. Similarly, Mona also explains
that the increased interest of consumers on the issue of sustainability is a driver for Indiska to improve on their sustainability efforts. Surveys of their consumers have indeed shown that there has been an increased interest for sustainability, and that particularly for Indiska, the consumers value their sustainability efforts. However, Christiane argues that while sustainability is an important parameter, there is also evidence that suggests that, in the end, what really matters for consumers is having a good-looking and functional product. She argues that just because the topic of sustainability seems to have gained interest on a global scale, it does not mean that you as a company can assume that your products will be sold just because they are sustainable. The products need to be sustainable, apart from being great from an aesthetic or quality perspective. Indeed, this was something that Åsa also stressed, in that being a premium brand, the consumers of Peak Performance would expect that sustainability is included in the products they buy, but it is not a guiding principle for them when buying the products. The consumers buy the products because they like them, and then they should get sustainability included, she argues.

For Peak Performance, Åsa does not think that their consumers are particularly informed in regard to sustainability, and she explains that they do not really experience a great consumer pressure for working with sustainability. That it has increased lately, however, is something she recognises, and she thinks it will have an increasingly important role in the future for them. In contrast, another perspective is given by the sustainable fashion consultant who argues that the drive for companies to go more sustainable is a combination of a reaction and pressure from consumers and proactive choices made by companies. The sustainable fashion consultant argues that consumers play a big part, and that the increased knowledge and willingness to pay for sustainable products will push companies to work harder. But, he or she echoes the same thought as Åsa in that in general, consumers are not that enlightened when it comes to sustainability issues. Sigrid also touches upon this issue, and from her perspective from working in Mistra Future Fashion with consumer surveys, she argues that most consumers say that they want to act “good” but they do not know what to look for when shopping. And furthermore, she argues that the motives for buying clothes are not driven primarily by concern for sustainability issues, but rather to fill their underlying needs with the products they buy.

Christiane argues that through analyses that Fjällräven have conducted on market trends and parameters that influence the state of the market, they believe that developing your business sustainably is important for managing risks and ensuring the future survival of the company. Particularly, to be able to meet stricter regulations but also to be ahead of regulations are seen as important capacities of the company in order to e.g. gain competitive advantages. Likewise, because of increased pressures from their B2B partners as well as increasingly also from consumers, Åsa explains that she believes that it will be important in the future to have integrated the questions of sustainability in your business in order to stay relevant. Also, she mentions the pressure from NGOs as an increasingly important factor for them, and that it thereby becomes more and more important to work with these issues.

Sustainability is partly driven by regulations according to several respondents. However, they all maintain that regulations are generally lacking in the industry. Sigrid explains that there has been some development recently, and that this is important because regulations and policies could be important drivers to create positive change, especially along the supply chains. She gives the example of the drafting of the UN fashion charter, where they had specifically asked apparel companies what they would need from the UN, and a central aspect that arose was in fact that they wanted to have more influence on local regulations and policies. The argument raised by her was indeed that a tax on virgin fibres, for example, would have the potential to
speed up the transition to recycled fibres. Similarly, Christiane argued that, for example, for an area like chemicals, implementing even stricter regulations could lead to significant changes for them and for their suppliers. For Indiska, regulations on chemicals was mentioned as an area where they work more progressively through implementing their own policies to e.g. avoid certain chemicals, aside from the European and national laws. Also, an interesting aspect that Sigrid brought up was the new regulations on producer responsibility of textiles that is in the process of being drafted by the Swedish government. According to her, this is a very new development in Europe, which puts more pressure on companies to start working with their downstream processes. Another aspect was raised by the sustainable fashion consultant, who argues that laws and regulations can play a role in the drive for companies to go more sustainable. He or she gives the example of sustainability reporting, which is only a requirement for large companies in Sweden and forces these to cover more aspects in their sustainability work than smaller companies.

4.3 Barriers and challenges for achieving sustainability

The challenges of achieving sustainability in the apparel industry were discussed with all respondents. The barriers and challenges that have been identified through the interviews are found below as: supply chains, resource intensive industry overconsumption, sustainable materials and circular economy.

4.3.1 Supply chains

Several respondents emphasised the complexity of the supply chains as a major challenge for the textile and apparel industry. Sigrid explains that one of the biggest challenges is that apparel companies do not own their own production, and consequently do not typically invest in innovation. She says that because production is outsourced to other companies, and usually also distant in terms of geographical location, it remains as a great challenge for companies to drive significant change. However, innovation in terms of material and product development was actually something that Christiane emphasized as a key aspect they are working with. She argues that for them, most innovation projects today are somehow connected to sustainability. Similarly, Åsa argued that one part of working with sustainability is indeed to be able to influence suppliers in order to work towards sustainability. One thing Peak Performance believe in is in fact to maintain a good relationship with their suppliers in order to achieve better results. Working together with their suppliers is something Christiane mentions as a way forward for Fjällräven, and in that way support the suppliers in reducing their impact. Also, the sustainable fashion consultant expresses that one thing companies should do is indeed to assess their suppliers on how open they are to work with sustainability issues.

However, Sigrid argues that most companies do not have any power to influence their suppliers in Asia in major ways, because they are too small to be able to do that by themselves and also to ask the right questions. In connection to this, the sustainable fashion consultant gives examples from his or her experience, and mentions that some Swedish companies have put demands on their suppliers to not allow overtime for the production workers, but that this is indeed difficult to control since the suppliers produce for other brands as well. Collaboration between apparel companies is therefore argued by several respondents as a good way to deal with this challenge. Christiane mentions that collaboration between actors is necessary, especially since many of them share the same suppliers, and could therefore work together to achieve new goals. This line of thought was echoed by the other sustainability managers as well. Åsa mentions that she has begun to notice a change in their suppliers’ attitude towards...
sustainability the more they have worked with them on these issues. She explains further that this is also due to the fact that more companies, not just them, are starting to put pressure on them. Mona emphasizes the notion of collaboration as a way to achieve change in the industry, and gives the example of how there is a mobilisation of a number of different actors in Sweden at the moment to start a Swedish initiative for ethical trade, which she says could be a good way for them as a smaller actor to be able to gain influence on these issues.

Furthermore, Sigrid explains that the challenge of a highly complex and long supply chain might entail a significant barrier for the companies, because they find it difficult to maintain control and transparency along the supply chain. Indeed, ensuring compliance was mentioned as a difficult task by several others. The sustainable fashion consultant emphasizes transparency and traceability as two interconnected major challenges because of all the different steps of production and the large number of actors involved. Practical challenges could also include poor internet connection in factories, which puts increased pressure on the time and resources of the producers. In connection to this, a perspective that both consultants shared was that a possible solution for companies is to choose to have their production in Sweden or in Europe, which is more regulated and also might be easier to control. However, the sustainable fashion consultant raises his or her concern that while moving production to Europe might have benefits in that it would be easier to visit the factories and maintain better relations with the supplier, it does not automatically ensure that the working conditions or compliance in other aspects would be better.

4.3.2 Resource intensive industry

The importance of managing the supply chains is of course due to the major impacts the production processes have on the environment and society. This was in fact emphasized by several respondents. Christiane explains that the production of textiles and clothes is indeed very resource intensive, and the challenge of reducing emissions to combat climate change is a common theme arising among the respondents. Christiane argues that the challenge is also to be able to measure and value the emissions data, because today it remains a great challenge to do this, partly because of the difficulty in receiving data on for example energy and water consumption of their suppliers, but also to value it in terms of their own products. But she explains further that production along the supply chains is extremely resource intensive in terms of both water, energy and chemicals, which is the greatest challenge and reinforces the importance of the issue. Mona confirms this by stating that the biggest challenges for the industry are reducing the water and chemical use, but she also mentions that ensuring living wages for workers is also a major challenge.

4.3.3 Overconsumption

Another major challenge that some of the respondents raised was that of overconsumption of clothes, and in particular the fast fashion trends. The sustainable fashion consultant argues that the short life cycles of fashion products constitute a major challenge for the industry because it creates incentives for consumers to buy new clothes more often. He or she argues that it leads to a value reduction of clothes, where consumers are not willing to spend much money on clothes that they will only use a few times. This was also mentioned by Christiane, who recognizes the challenge of overconsumption and fast fashion trends, which she thinks is a dominating challenge that the textile and apparel industry faces. However, as previously stated, neither of the three sustainability managers identify themselves with the term fast fashion. Interestingly though, Sigrid raises a different view of the challenge of consumption that
addresses the underlying needs of consumption, which comes from her experience and knowledge from her time at Mistra Future Fashion. She explains:

“What our studies showed was that this thing about buying new all the time is not a driver, but if you could get an accessibility so that you can change your look all the time and fill the need that you may feel, if you do that through renting clothes or buying it second-hand, it does not matter that much.”

Sigrid Barnekow, sustainable fashion consultant

4.3.4 Sustainable materials

All three sustainability managers argued that there is a tension between choosing a more sustainable material and the associated costs of that material, which in turn leads to smaller margins of products. Mona explains that some things cost money and resources to develop, and that this could slow them down a bit in moving forward towards their goals. She gives the example of recycled polyester, which is more expensive to purchase than virgin polyester. Likewise, Åsa argues that, in general, materials that are made through more sustainable processes are more expensive to purchase. For Peak Performance, it is then about making smart purchases and to develop and design their products with this in mind from the start. However, she explains further that they want to make sure that the material they choose is actually better in terms of impact, since the complexity of sustainability sometimes makes it hard to assess how one choice over another would be better.

Apart from the higher costs associated with better materials from an environmental or social perspective, there is also a challenge of maintaining the quality of the product when deciding on materials, which was particularly argued by Åsa. She says that in exploring different options of more sustainable materials it is also crucial to consider the demands on quality that they have for their products. So, the challenge is to be able to continue to deliver products that have the same high quality and at the same time be sustainable, according to her. Similarly, Christiane also mentions the fact that it is not only sustainability that affects the costs, but a number of different factors, which overall adds more pressure.

4.3.5 Circular economy

The challenge of transforming the system to one that is not linear but circular is discussed by several respondents. Sigrid argues that it is partly a technological and innovation challenge, and partly a challenge of changing consumer behaviours. She argues for the second part that it is still a rarely limited group of people who buy second-hand, for example, and that seek out different, more sustainable options. And this needs to change, but she thinks that what is needed are structural changes in the society, which would make these options more available and convenient. However, Sigrid argues that this links together with the technological challenge, since this also would entail immense infrastructural change for setting up a national recycling industry for textiles, for example.

Furthermore, the sustainable fashion consultant explains that the challenge of recycling is that the fibres need to be separated from each other, and even though the technology exists today, it remains an extremely complex and expensive process that produces very small quantities. Therefore, it is a major challenge to make it work in a macro level on the market, according to him or her. However, both consultants point out that there is a lot happening concerning this at the moment, and there are a number of projects in Sweden that support this development.
However, as Sigrid mentions, the quantities of recycled fibres that are produced today are so limited that many companies struggle with purchasing the right volume or to meet the minimum volumes. Indeed, this challenge is raised by Mona, who explains that they have to be able to reach certain minimum quantities, e.g. when buying recycled polyester from certain suppliers. Because of their relatively small size as a company, they find it difficult in some cases to reach those quantities that are required. Indeed, the challenge of making recycled fibres part of the business on a large scale is also mentioned by Åsa.
5. Discussion

*In this section, the empirical material is related to other scientific research and previous research on the topic. The discussion will connect and combine the research questions and themes identified in previous sections to allow for a richer analysis and fulfil the aim.*

5.1 Sustainability in apparel

From the analysis of the empirical material on how apparel companies in Sweden work with sustainability, both in terms of what they actually do and how they act in response to different types of drivers affecting them, it is evident that there is a divergence among companies. The view of the consultants brings out the fact that the market today is very much made up of companies with different strategies and approaches to sustainability, which indeed connects with the view of Engert and Baumgartner (2016) that states that sustainability strategies are very heterogenous in terms of design. The heterogenous approach to sustainability strategies in the apparel industry in particular also links to the complexity of the issue. From the interviews with sustainable fashion consultants a common perspective that arose was that the complexity of sustainability in fact could be a great challenge for companies to decide on how to structure their efforts. Indeed, this was brought up by some of the company respondents, who argued that the issue of sustainability in terms of fashion and apparel products is extremely complex, and it is sometimes challenging to get hold of correct information that guides them forward in the right direction.

In terms of the strategic importance of sustainability, the perspectives of the three sustainability managers showed that sustainability is indeed something they do because they see it as a necessary way forward. Lloret (2016) argue that the idea behind sustainability strategies is that companies take action on sustainability issues in order to create competitive advantage. However, due to the importance of sustainability today it could also be considered to be key for the future survival of a company (Lloret, 2016). It was evident from the empirical findings that sustainability in apparel is indeed regarded as something that has increasingly been paid attention to, in society overall and from different stakeholders within the industry. Smith (2003) raises the view that sustainability is especially important for actors in sensitive business areas, and indeed, several respondents discussed issues of risk and pressures from NGO’s that indicates a concern for the inherent market risks as well as public image problems that apparel companies might face due to this.

Nonetheless, as the perspectives from the sustainability consultants showed, sustainability is a hot topic, but still not in the mainstream. And even though many companies seem to be talking about sustainability, the consultants of this study remain critical to how some companies focus on sustainability from a singular perspective, especially in marketing, for example by using organic cotton or working with quality of their products. The complexity of sustainability was regarded as key here, and what is interesting is the fact that all three sustainability managers in fact agreed on the importance to take a wide approach to sustainability. Henninger, Alevizou and Oates (2016) argue that there is no common definition of sustainable fashion today that considers sustainability in a holistic way. They continue to argue that the rise of a common understanding of sustainable fashion could indeed help apparel companies and other actors to align their strategies in accordance with key criteria that should be fulfilled, and thereby avoid singular-aspect focus on sustainability that is misleading to consumers. Even so, with the lack of that common framework, all three companies of this study were argued to consider both
social and environmental aspects of sustainability, taking measures to reduce their impacts on these respective areas. However, interestingly, the focus of the sustainability strategies of the apparel companies in this study were strongly linked to their corporate values, and therefore looked different from each other. For example, Indiska was founded with a strong focus on social commitment, and therefore their efforts on sustainability were indeed focused more on social sustainability as part of their business. In contrast, Peak Performance were argued to have a strong link to quality when considering sustainability. However, there were a lot of overlaps between the companies’ sustainability strategies, in that all three worked with sustainable materials and processes, social auditing and compliance and working towards reducing emissions along supply chains.

The views on the particular main reasons for why apparel companies work with sustainability differs slightly among respondents, both in terms of insight from the companies and from the consultants. Apart from the above-mentioned importance of sustainability regarding corporate values, the respondents seemed to share the view that there has been an increased pressure over time to work with these issues, and that this accumulated pressure acts as a strong driver for companies. One driver that was identified through the empirical material but not typically argued in literature was the increased pressure companies experience when recruiting new employees. The pilot survey study of Swedish fashion companies did, however, find similar indications in their results, where internal pressures from owners and employees were a significant driver to work with sustainability (Tillväxtverket, 2016). This could certainly be a reflection of a renewed interest in sustainability found among younger generations, as implied by one respondent, or that it has become more important overall in society to work for responsible companies. For all three companies a multitude of pressures were identified, from existing and potential employees, consumer interests and thereby the market potential of more sustainable products, as well as external pressure from other stakeholders such as NGOs, retailers and business partners. This seems to support the trend towards sustainability in an industry characterised by an image problem, which is argued by Da Giau et al. (2016). Indeed, the increased pressures from stakeholders has been indicated in the Nordic context as well, where this seems to create change towards the creation of more proactive and opportunity-seeking strategies in the apparel industry (Pedersen & Gwozdz, 2014).

Furthermore, in terms of internal drivers, Macchion et al. (2018) argue that companies with a more reactive approach to sustainability are overall more driven by cost-reductions rather than having a strong vision deriving from the top management. This is interesting, because in the case of the companies participating in this study, none of the sustainability managers mention cost-reductions as a driver to work with sustainability. This could be explained by the proactive approaches to sustainability these companies seem to exhibit. In fact, all of them agree that there is often a tension between choosing a better, more sustainable material, for example, which means deliberating the costs that are associated to it. Indeed, Macchion et al. (2108) argue in the same study that it often costs to choose to be involved in sustainability projects, and that the costs could act as a barrier to change for companies that do want to take a more proactive approach. Some differences between the companies of this study arose on this issue, however, where both the sustainability manager of Indiska and of Peak Performance mentioned that lack of resources (e.g. time, money) may act as a limiting factor towards change, while the sustainability manager of Fjällräven did not express this as a barrier. This could be due to the strong commitment from the top management of Fjällräven, which was indeed mentioned to be very important for them.
Lastly, another set of drivers that had been identified in literature were the law drivers, which is argued to not be particularly strong for the apparel industry because companies generally seem to strive to go beyond existing regulations and policies (Caniato et al., 2012). Indeed, the same evidence was found among companies participating in this study, where the sustainability manager of Fjällräven even argued that they see the importance of working proactively with sustainability in terms of being able to anticipate new regulations. The perspectives of the consultants also seemed to confirm the view that regulations are lacking in the industry, and that in many cases it is an issue of ensuring compliance on policies that companies set themselves since local laws and regulations are sometimes lacking. However, the emergence of new regulations in Sweden on textile wastes, as was mentioned by one respondent, has the potential for major implications for the industry to take care of some of the downstream impacts arising from consumption. And, it is an example of how new regulations could pressure companies to change their way of doing business.

5.2 Consumer perspectives

Through the empirical material the tension between the increased interest in sustainability among consumers and the lack of significant changes in consumption patterns towards sustainability was explored. To a high degree, the consumer perspective is emphasised in literature, and is maintained as an increasingly important factor that actually can influence the strategic choices of apparel companies (Strähle & Müller, 2017). But, even so, it has been argued that consumer choices when it comes to clothes are influenced by many other factors that usually have higher influence than what the concerns for consuming sustainably have (Mamoq, 2018; Crommentuijn-Marsh & Eckertb, 2010). In fact, the respondents seemed to be aware of this phenomenon, and their insights gave different perspectives on this. From the three company perspectives, they all discussed the fact that they have seen an increased interest in sustainability from their consumers. However, it was not considered as a specific driver for Peak Performance, which sets them apart from the other two apparel companies that indeed recognize this as one of the drivers for them. Interestingly, both Åsa at Peak Performance and Christiane at Fjällräven argued that the most important thing is for their products to be of great quality and then to also be sustainable. Only delivering a sustainable product is not enough, just because of the fact that consumers first and foremost want to meet a need they have. This line of reasoning was indeed raised by several respondents and seems to indicate that it is important for companies to work with sustainability, but not for the only purpose of meeting the increased demand for sustainable products, since it is still considered to be mostly of interest to a rather limited group of consumers.

The growing demand for sustainable products was indeed also discussed by the two consultants, and it was argued by both that, in general, there is a lack of knowledge among consumers on sustainability, even though they seem to have become more aware of the negative impacts of the industry. These views are similar to the findings of the consumer study by Naturvårdsverket (2018), in that the lack of knowledge among Swedish consumers generally seems to be low. However, the demand for more information seems also to indicate room for potential opportunities for apparel companies. Indeed, this would have the major implication that companies that seriously considers a proactive strategy to sustainability also have started to educate their consumers on the topic, in order to foster positive changes of consumption, which is also argued by Cleff et al. (2018). This is also evident from the findings of the empirical material of this study since all five respondents argue for the importance of influencing the consumers through e.g. promoting repair-services, easy-access information of the sustainability properties of products or designing clothes that do not follow fashion trends to a large extent.
5.3 Trends towards new ways of doing business

Circular economy was identified as both a large-scale trend and indeed a major challenge for the industry, in line with the evidence argued for in the report by Ellen MacArthur Foundation (2017). All respondents noted on the fact that ideas of circularity are indeed shaping the strategies of apparel companies today, affecting how they design new clothes and work with recycled materials as well as exploring new ventures of renting or leasing clothes. But even though it was mentioned as a trend, circular economy was also argued as a necessity, or indeed as a fitting framework to discuss sustainable fashion in general. Some of the respondents have noticed changes in the market over the past few years, and that newer small companies are actually incorporating these ideas of new business models, which challenges the paradigm of the traditional model of producing new clothes by using virgin fibres in a linear system. According to literature, most strategies of apparel companies have been focused on developing strategies to target issues of efficiencies in a linear system, mostly through a reliance on technology to improve existing processes (Mora, Rocamora & Volonté, 2014; Cleff et al., 2018; Niinimäki & Hassi, 2011). In contrast to this perspective, the empirical analysis showed a more nuanced view among the respondents, where sustainability was argued to be a case of both reducing the impacts of current processes, designing products that are durable and do not typically follow fast fashion trends, and that also incorporates more sustainable as well as recycled materials. This indicates a more design-focused approach, which is argued by Mora, Rocamora and Volonté (2014) in particular to be favourable for achieving a sustainable fashion industry.

However, most respondents gave rise to a view that shows tendencies of a reliance on technology to solve large-scale issues, particularly regarding the challenge of recycling fibres to be used into new clothes. This highlights the fact that is argued in literature, which is that any strategy on design for social change also entails a need for technology to support the new system (Mora, Rocamora & Volonté, 2014). The transition towards a circular system of apparel was indeed argued by some respondents to be slowed down by the fact that the technology for recycling fibres is still mostly existing on a small scale, and what is needed is for it to work in a large scale. For Indiska, for example, a part of the challenge is for small actors such as themselves to be able to reach minimum quantities in order to purchase recycled materials. One respondent describes this as a ‘mismatch’, which puts pressure on the system. In tandem with looking increasingly at these types of new development on the market, the company respondents did express that the strive to minimize emissions in the supply chains is on the agenda at the moment. This could be an example of how their strategies still seem to move between the technology strategies and the design for social change strategies that are outlined by Mora, Rocamora and Volonté (2014).

However, as Cleff et al. (2018) argue, the ambition should be to use these innovations to move sustainable products out from the niche and into the mainstream. Through the development of an integrative approach of sustainability into main processes of the business and the continuous strive of some companies to increase the percentages of sustainable materials in their products would indeed be beneficial for this purpose. Although, the view of some respondents was in fact that most apparel companies today take the business-as-usual approach and do not seem to take part in the recent ideas of systemic change of how apparel companies should produce and sell clothes. But, the respondents of this study acknowledged the indicated transformation of market trends that also have implications for the future consumption of clothes. One of the major challenges that the industry faces has indeed been argued to be the downstream challenge
of overconsumption (Pedersen & Andersen, 2015). Multiple sources argue that the challenge of sustainability in the apparel industry is to be able to tackle the root causes, i.e. the low clothing utilization and low rates of recycling of clothes, of the wasteful and linear system that is dominating the market today (Ellen MacArthur Foundation, 2017; Mora, Rocamora & Volonté, 2014). The trend identified by respondents towards a more service-based economy and an increased interest in circular business models are examples of how some actors on the market might be addressing these issues. To increase the accessibility of these new business ideas seems to have the potential to target the increased interest from consumers and at the same time fulfil their needs of updating their wardrobe. However, what was clear from the insight of several respondents was the fact that the profitability of these new ways of doing business is hard to attain. One respondent argued that investors in large part remain reluctant to the profitability of circular business models. Likewise, another respondent shared their experience of having tried selling second-hand-clothes but that it was hard to make it profitable partly because the demand was not high enough. Though, as discussed previously, the demand seems to be increasing across different parameters, and all three company respondents seem to share the view that the interest from consumers is generally increasing.

5.4 Supplier perspectives

Furthermore, what is argued in literature by Garcia-Torres et al. (2019) is that the industry itself is highly characterized by low regulations, which was argued by some respondents to have an impact on the sustainability efforts of apparel companies. In part, because the fact that the industry lacks strong regulations on many aspects, many companies choose to go further than what is necessary. By one consultant respondent, this was indeed argued to have led to the proactive response by apparel companies to express their interest in being able to influence new regulations to a larger extent. One company respondent argued that the challenge is that to be able to influence your suppliers in certain aspects, for example, you would need to be able to influence local regulations and policies because you lack the power to do this by yourself. And since apparel companies have generally been argued to experience more pressure to be responsible for their direct impacts as well as indirect impacts of their suppliers (Caniato et al., 2012), this challenge has become increasingly important. What the results from the empirical material seem to indicate, however, is that while this is acknowledged as a challenge they try to work with, the implications would be that more strict policies are necessary, which could be argued sometimes to be out of the control of the apparel companies.

The responsibility of apparel companies concerning measures they can take in order to reduce the indirect impact at supplier-level was discussed by several respondents. The shared view of all respondents was that ensuring compliance along the supply chain is an important part of the sustainability efforts of apparel companies today, likewise to that argued in literature (Caniato et al., 2012; Strähle & Müller, 2017). However, a difference among the respondents was indicated in that the consultants emphasised this as a major challenge for the industry because of the lack of transparency and difficulties arising when conducting audits. The sustainability managers, though, emphasised the opportunities they see in maintaining good relations with their suppliers and work together with their suppliers or partners to achieve their own goals. Indeed, the lack of transparency along supply chains was something the literature emphasised as a significant barrier for apparel companies to achieve sustainability (Pedersen & Andersen, 2015), and therefore these results are interesting. The companies of the study all clearly state that they work carefully with choosing their suppliers and partners, and to work with them long-term rather than only chasing the lowest prices. Therefore, it might seem as though there is a more proactive approach among companies of this study to work closely with their suppliers in
order to achieve new goals together with them, rather than just checking for compliance. However, the sustainability managers do express that having control as well as ensuring compliance is challenging overall, and is something they continuously work with improving, which stresses the importance of it. An example of how they regard their responsibility in terms of the impact of their suppliers is that all three sustainability managers discuss and recognizes the fact that the production is extremely resource intensive, and therefore that reducing this impact is indeed identified by them as a driver to work with sustainability, but also as a great challenge for the industry and for themselves.

One opportunity all respondents express is that there has been a lot of recent activity on collaboration between different actors within the industry, and that this brings about many benefits and opportunities for companies to exert pressure on suppliers and gather information that help them in decision-making on complex sustainability issues. Involving themselves in networks and initiatives on different areas of sustainability was pointed out as important for all companies, but for different reasons. What was most interesting on this point was in fact the different approaches by the companies, but also the fact that the consultants agreed that it had become common to work in this way. By one respondent it was indeed identified as a major trend of the industry, but that the actual outcomes of these collaborations were in many cases mostly expressed as an opportunity to achieve new goals going forward.
6. Conclusion

As stated in the introduction, this thesis takes on a broad scope with the aim to explore the topic of sustainability in relation to the Swedish apparel industry. As part of this aim, it strives to give insight in how sustainability strategies of apparel companies are shaped, as well as exploring sustainability drivers and main challenges within the apparel industry, from the perspectives of five respondents working specifically with sustainability in the field of apparel in Sweden. Subsequently, this study shows that the concept of sustainability is indeed highly complex and broad in regard to the design, production and use of clothes. The global structure of the industry was found to have implications for a variety of sustainability challenges, and the increased concern in society on these issues was indeed found to influence the practices of apparel companies to various degrees. The future of the apparel sector is believed to be increasingly affected by new ideas to produce and indeed also consume clothes that currently have started to challenge the still dominating linear system. The transition towards a circular apparel and fashion system was not only identified as a major trend but also as a necessary way forward, which has the potential to radically change the industry in order to substantially reduce the negative impacts that it causes. However, some major challenges remain in moving sustainable fashion from the niche market to the mainstream, without eroding the concept. Especially regarding the consumer perspectives, the difficulty in communicating the complexity of sustainability in a compelling and easily understandable way would be a challenging task going forward. In conclusion, the industry faces many challenges concerning sustainability, but the proactive approaches by apparel companies seem to create new opportunities for change. Also, the anticipated further increase in interest in sustainability in society and subsequently among consumers and other actors may stimulate further advancements of the strategic responses among apparel companies.
7. Acknowledgements

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8. Reference list


Appendix 1 – Interview guide for sustainability managers

- Consent for data processing (verbal and audio-recorded)

**Background questions**
- Name
- Work role and main responsibilities
- How many years in the company/industry?
- Could you tell me a bit about your sustainability work overall?

**The apparel company’s sustainability work**
- What are the most important parts of your sustainability work? What is most important for you?
  - How has this changed over time? Is it different than before?
- Why are you working with sustainability? What is it that drives you?
  - Internal/external/law drivers? E.g. consumers, reducing costs?
- What role do you think that you as an apparel company has to push the sustainability work in the industry?
  - What expectations do you perceive are on you? From consumers? Others?
  - Has this changed over time?

**Challenges and barriers**
- What do you see as the main challenges that the industry faces at the moment?
- Do you experience that there are any tensions between working with sustainability goals and any other goals that you have?
- What do you think would be needed in order to be able to work successfully with sustainability in the apparel industry?
- What barriers do you experience in developing your sustainability work?
  - What factors impede your ambitions to work effectively?
- How does your continued sustainability work look like?

**Consumption and communication**
- How do you view your role (as an apparel company) to influence consumers to consume more sustainably?
  - At time of purchase, the use phase, or in discarding the clothes
- In what way are you held accountable by consumers for your work on sustainability?
- How important would you say that the communication on sustainability to consumers is for your sustainability work?
- Do you experience any difficulties in communicating sustainability to consumers?
Appendix 2 – Interview guide for consultants

- Consent for data processing (verbal and audio-recorded)

**Background questions**
- Name
- Work role and main responsibilities
- How many years in the company/industry?
- How would you best describe sustainability in relation to the apparel/fashion industry?

**Sustainability within apparel and fashion**
- From your perspective, what are some of the most recent developments in sustainability within fashion at the moment?
- From your experience in the industry, have you seen any trends in how you work with sustainability in fashion?
- Why do companies work with sustainability?
  - Internal/external/law drivers? E.g. consumers, reducing costs?
- What role do you think that apparel companies have to push the sustainability work in the industry?
  - What expectations are placed on apparel companies? From consumers? Others?
  - Has this changed over time?

**Challenges**
- What do you see as the main challenges that the industry faces at the moment?
- What do you think would be needed in order to be able to work successfully with sustainability in the apparel industry?
- How do you believe that the sustainability work in the industry will develop going forward? What challenges are most important to address?

**Consumption and communication**
- How do you view the role of apparel companies in influencing consumers to consume more sustainably?
  - At time of purchase, the use phase, or in discarding the clothes
  - How/to what extent is this shown in communication towards consumers? Good/bad examples?
- In what way are apparel companies held accountable by consumers for their work on sustainability?