

Sustainability and the UK's Leading Clothing Retailers

By Peter Jones*

'As consumers seek products that cause minimal environmental harm and bring about positive social impact, and as awareness of supply chain impact grows, retailers must embrace sustainability.' (Vadakkepatt et al. 2021)

The UK's clothing retailers have a global reach which embraces a range of elements including, the production of the raw materials, a variety of treatment and manufacturing processes, retailing, and consumption, and all these elements face a variety of environmental and social challenges, which are increasingly in the public eye. With this in mind, this paper offers an exploratory study into how the UK's leading clothing retailers are publicly addressing sustainability. The paper reveals that the leading clothing retailers addressed a wide range of issues including strategic corporate commitment; climate change and greenhouse gas emissions; environmental protection; the circular economy; protecting workers in supply chains; diversity, equity and inclusion; health and safety; and links with communities and charitable donations. More generally, the author offered three sets of wider reflections, focused on the different meanings of sustainability and the relative importance of business drivers vis-à-vis environmental and social sustainability drivers; the aspirational and expectational nature of many of the selected companies' approaches to sustainability; and tensions between sustainability and economic growth.

Keywords: *Clothing retailers, sustainability, strategy, circular economy, UK*

Introduction

Clothing retailing in the UK embraces a range of elements within its value chain, including, the production of the raw materials, a variety of treatment and manufacturing processes, retailing and consumption. All these elements face a variety of environmental and social challenges. The production of raw materials, spinning these materials into fibres, weaving fibres into fabrics, dyeing, and garment production require large volumes of water, as well as chemicals, notably pesticides and insecticide, and the pollution generated by garment production has a major impact on the health of local people, animals and ecosystems. Widespread concerns have been expressed about working conditions, notably human rights and modern slavery, in textile and clothing manufacturing factories in retailers supply chains. Here, consumer demand for cheap clothes and fast fashion is seen to be driving the clothing retailers' business model which is based on cheap labour, and low prices. Abbatte et al. (2023), for example, claimed, *'clothing manufacturing and transportation produce a large volume of waste and high*

*Emeritus Professor, School of Business, University of Gloucestershire, UK.

greenhouse gas emissions, often taking advantage of cheap labor in developing countries. As a result, stakeholders are becoming more aware of the effect of the textile, apparel, and fashion industries on the climate and human rights, thus pushing businesses to mitigate their environmental damage.'

At the same time, western consumers' clothing shopping behaviour generates the emission of greenhouse gases associated with shopping journeys and online shopping deliveries, and is more generally seen to be part of unsustainable patterns of consumption. In short, the transition to sustainable patterns of development within clothing retailing faces a variety of pressing challenges, which are increasingly in the public eye. Almost a decade ago, Bostrom and Micheletti (2016) recognised that *'textiles and clothing now play a key role in the global public discourse on climate change, chemical society, water shortage, and human rights. Their production and consumption raise several questions and worries that create challenges about how people live their political, social, and economic lives. Many of the challenges concern several common societal and private practices and the role of various and often conflicting values associated with production and consumption.'* Further, Bostrom and Micheletti (2016) argued that *'conventional clothing retailers must take more responsibility for bringing sustainability values into their marketing strategies.'*

The UK is one of the world's largest consumers of clothing and though there were over 12,000 clothing retailers in 2021 (Statista 2023), the UK's clothing retailing sector has become very concentrated. A century or so ago, clothes were made by multiple tailors and sold in small independent shops, but now the retail market is dominated by a relatively small number of large retailers who have national networks of outlets, including Next, Primark and JD Sports who specialise in clothing, and Marks and Spencer, the John Lewis Partnership and Asda, who sell a wider range of merchandise as well as clothing, and source their clothing ranges from the world's leading clothing producers, including China, India, Bangladesh, Vietnam, Pakistan, Turkey, Cambodia, and Indonesia. With this in mind, this paper offers an exploratory study into how the UK's leading clothing retailers are publicly addressing sustainability. The paper includes, a short literature review, a description of the frame of reference and method of enquiry employed to gather the empirical information for the study, an examination of how the UK's top ten clothing retailers are addressing sustainability, some reflections on a number of wider issues, and a conclusion.

Literature Review

The academic literature on sustainability in clothing retailing covers a wide range of issues, but a brief review of that literature identified a number of interlinked themes, namely, retail sustainability strategy; consumer behaviour and so-called fast, and slow, fashion; supply chains; consumer behaviour; and the circular economy. These themes help to set an academic context for the paper.

Peters and Simaens (2020) focused on a textile and clothing company to investigate integrating sustainability into corporate strategy. Their findings

revealed a number of institutional, organisational and individual drivers of, and barriers to, the integration of sustainability into the corporate strategy of a German based clothing retailer. While the case company was successful in integrating sustainability into all relevant processes, one of the main obstacles was the inability, or unwillingness, of many customers to pay higher prices for sustainable products. In conclusion, the authors argued that if sustainability is to be successfully integrated into corporate strategy it must be deeply anchored in all departments, and into a company's daily tasks.

Claxton and Kent (2020) used a mixed method format based on semi-structured interviews and a quantitative survey of designers, to advance understanding of how the management of fashion design strategies could contribute to environmental sustainability, and their objectives were to investigate how fashion businesses use environmentally sustainable strategies and how designers contribute to the development of sustainable products. The research demonstrated the relatively limited influence of designers on sustainable fashion strategy and their engagement at a tactical organisational level, and in conclusion a model was developed for the integration of designers into the management of sustainable fashion business.

Botwinick and Lu (2022) used regression analysis to explore retailers' merchandising strategies for recycled clothing based on apparel items sold in the US retail market from 2018-2021. Their findings revealed that US retailers adopted distinct product assortment strategies for clothing made from recycled materials in terms of clothing in terms of colours, design patterns and product categories, compared with regular new clothing. Botwinick and Lu (2022) also suggested that US retailers were more likely to price recycled clothing lower than the market average, but more likely to target them for the luxury and premium market segments, and claimed that their research revealed the necessity of improving recycling technologies and of changing consumers' perceptions of recycled clothing's values.

de Oliveira et al. (2022) looked to explore customer perceptions of sustainability in two different stores, the one specialising in slow fashion, the other in fast fashion, in Brasilia. Their findings revealed that, in general, customers did not have knowledge of the sustainability practices adopted by the retailers, but that for 78% of the fast fashion customers, and 91% of the slow fashion customers, customers perceptions changed positively once they were appraised of the retailers' sustainability practices. However, the research also suggested that while customers believe that retailers should pursue sustainable practices, they were unwilling to pay a higher price for a sustainable product, and the authors concluded that much remains to be done if sustainable products are to be seen a competitive by consumers.

Seock et al. (2024) claimed that slow fashion had emerged as a response to the environmental and ethical problems of fast fashion, but argued that customers' purchase behaviour lagged behind their awareness of these problems. Their research looked to explore the impact of environmental sustainability consciousness, including knowledge and attitude, on Generation Z and Millennials' slow fashion practices. The findings suggested that there was a critical link between

environmental consciousness and sustainable consumption practices in fashion, and bridged the gap between knowledge and attitude and consumer buying behaviour in the context of the emerging slow fashion trend.

In outlining *'the environmental price of fast fashion'*, Niinimäki et al. (2020) identified a range of major environmental impacts, including water use, chemical pollution, carbon dioxide emissions, and waste, and outlined the need for fundamental changes in the fashion business model, the introduction of sustainable practices throughout the supply chain, and a shift in consumer behaviour, which must include decreasing clothing purchases and increasing garment lifetimes. The authors argued that these changes stress the need for an urgent transition back to slow fashion, minimizing and mitigating the detrimental environmental impacts, so as to improve the long-term sustainability of the fashion supply chain. Jung and Jin (2016) explored how slow fashion attributes, namely, equity, authenticity, functionality, localism and exclusivity, increased customers' intentions to buy, and to be prepared to pay a premium price for, slow fashion products

Arrigo (2020) investigated the global sourcing strategies of fast fashion retailers in an attempt to ascertain if they had changed over time to embrace sustainability considerations. This work is particularly important as fast fashion is one of the main sources of public criticism about low transparency and unsustainability in fashion supply chains. The findings revealed that fast fashion retailers identified sustainability as a key element in selecting sourcing locations, since sustainability issues at suppliers' factories may represent relevant hidden costs. Miotto and Youn (2020) looked to examine the impact of fast fashion's sustainability collections on corporate legitimacy. Their findings revealed that fast fashion retailers' sustainable collections not only had a positive impact on corporate legitimacy, but that such collections also had a positive influence on customers' brand trust and purchase intentions.

Talay et al. (2022) observed the growing power of retailers in the fashion supply chain, in their study of the asymmetric relationships between large UK retailers and small suppliers. The authors adopted a qualitative approach which drew on the experiences of 10 fashion suppliers and two high street fashion retailers. The findings suggested that the asymmetric relationships in the supply chains helped to reduce the environmental impacts of fashion products and but that in the UK, increased fashion sales volumes, short lead times, and the continuous evolution in fast fashion trends meant that consumers retained clothes for less than their expected lifespan, and as such, had an impact on environmental and social sustainability.

Byrd and Su (2020) investigated US consumers' perceptions of, and behaviour towards, apparel labels, and environmental and social apparel. Their findings indicated that while customers expressed positive sentiments towards apparel sustainability, they lacked the knowledge of socially and environmentally practices within the apparel industry. More generally, the authors suggested that consumers had only limited knowledge of environmental, sustainable and social apparel or what such terms meant, and were not aware of the retailers and brands that sold such garments, nor of the validity of the retailers' claims about them. In addition, Byrd and Su (2020) argued that retailers and brands who want to achieve

success with their sustainable ranges, will need to find new ways to target their market by accurately labelling products and educating consumers about claims made on the labels.

Dangelico et al. (2022) investigated the factors which influence green behavioural intentions in the clothing industry, through a survey of over 2,500 Italian consumers. This research focused on the influence of consumers' environmental concerns, perceived value of products, and consumers' direct and indirect experiences of the product, on purchase intentions and on willingness to pay a premium price for sustainable fashion products. The findings revealed that environmental concern and perceived positive value affected purchase intention, a willingness to pay a premium price regardless of the type of eco-materials used for the product, whereas direct and indirect experiences have different effects based on the specific eco-materials use, and, more generally, that green consumer behaviour is strongly dependent on consumers' socio-demographic characteristics.

Having argued that the fashion industry is one of the world's most wasteful consumer industries, Brydges (2021) investigated how the Swedish fashion industry has implemented circular economy principles. He investigated the sustainability challenges facing brands and looked to determine the stages in the supply chain, namely design, production, and retail, and where these challenges occurred, and then mapped circular economy strategies across the key stages of take, make and waste. The author suggested that if the fashion industry was to move towards circularity, then retailers and brands needed to integrate these strategies across supply chains, rather than just focusing on the waste stage. Research by D'Adamo et al. (2022) on the second-hand market in the fashion industry demonstrated that garment collection is not necessarily the best practice for the circular economy. Rather, close collaboration between manufacturers and retailers in the supply chain was required to move the industry towards sustainable production and consumption. The findings also suggested that harvesting management, and internal competition on low-cost collections, are critical business drivers, while responsible consumption is an opportunity for consumers.

Dissanayake and Weerasinghe (2021) argued that despite the strong desire and demand of the fashion industry to move to a more circular business model, less is understood about the concepts and application of the circular economy, in the fashion business. Their work looked to offer a framework of strategies that facilitated the move from linear to circular fashion. This framework identified, and discussed, four key strategies, namely resource efficiency, circular design, product life extension, and re-use, to facilitate the transition to circular fashion. The design stage was seen to be crucial and involved design for longevity, for customisation, for disassembly, for recycling, and for composting. Frei et al. (2020) investigated how far sustainable practices and circular economy concepts have been implemented in online retail returns systems. They identified vulnerabilities, barriers, and challenges to the implementation of sustainable, circular practices, and suggested ways to overcome them, in the belief that sustainability, loss prevention, and profit optimisation, can go hand in hand with the right approach to the organisation of the reverse supply chain.

Frame of Reference and Method of Enquiry

In the light of the introduction to this paper, the author addressed a single research question, namely, how are the leading clothes retailers within the UK publicly addressing sustainability. In order to answer this question, a simple frame of reference and method of enquiry were adopted. The UK's leading ten clothing retailers, namely Next, JD Sports, Primark, Marks and Spencer, Asda, TK Maxx, The John Lewis Partnership, ASOS, Sports Direct, and Tesco, as measured by market share, and as listed by Retail Economics (2023), were selected for study. As the leading clothing retailers in the UK they might be expected to reflect good practice in addressing sustainability. Brief pen pictures of the selected companies are outlined below.

Next is a multinational UK clothing and footwear retailer, originally founded in 1864. The retailer trades from some 700 stores, of which 500 are in the UK, where it is the country's largest clothing retailer, with a further 200 in mainland Europe, Asia and the Middle East. JD Sports is a UK sports fashion retailer, founded in 1981. The company trades from 3,400 stores principally in the UK, mainland Europe, North America, and the Asia Pacific region. Primark, a leading clothing international retailer, founded by Associated British Foods in 1969. has over 400 outlets across the UK, Ireland, mainland Europe and the US. The retailer's product range includes menswear, womenswear, and children's' wear. Marks and Spencer is a UK multinational retailer, established in 1894. The company's product range includes, clothing, food, and household goods. Asda is a UK supermarket retailer founded in Yorkshire in 1965, it trades from over 600 locations within the UK, and the company's product range includes food, general merchandise and clothing. The George at Asda brand is one of the UKs leading clothing brands, and is available within the company's stores and in some locations in free standing outlets.

TK Maxx, a subsidiary of the American apparel and home goods company TJX Companies, is an off-price retailer, that trades from over 350 stores within the UK and offers a range of clothing and accessories from various brands at discounted prices. The John Lewis Partnership, founded in 1929, operates a number of department stores and a large chain of supermarkets and convenience stores. The company has 52 department stores in the UK, and offers clothing and accessories including their own brands, as well as designer brands, such as Ted Baker and Whistles. ASOS is an online retailer founded in 2000 that offers clothing, accessories and cosmetics, which are targeted at young adults. The company's website sells over 850 brands and distributes it range worldwide, from fulfilment centers in the UK, mainland Europe and the US. Sports Direct, founded in 1982 and part of Frasers Group since 2019, trades from over 480 stores throughout the UK, and offers a wide range of men's' women's and children's sportswear, clothing, and footwear. Tesco, founded in 1919, is a UK based multinational groceries and general merchandise retailer and its product range includes food, books, clothing, electronics, furniture, toys, and software. Its range of clothing, carried under the F&F brand, includes womenswear, menswear and

children's wear. While ASOS trades exclusively online, the other nine clothing retailers offer their ranges in store and online.

The author conducted a series of Internet searches, using sustainability report and the names of the selected ten retailers, as key terms on Google in November 2023. This search revealed considerable variety in the ways the selected companies publicly addressed sustainability. Five of the selected retailers, namely, Next, Primark, Marks and Spencer, Asda, and the John Lewis Partnership, had posted dedicated a sustainability reports or corporate social responsibility reports/environmental, social and governance reports, two retailers, namely JD Sports and Tesco, had posted annual reports which contained material on sustainability, one company, ASOS, had posted a report entitled *Fashion with Integrity*, which contained material on sustainability, and the two remaining retailers, TK Maxx and Sports Direct had posted some information on their approach to sustainability. The retailers' websites are listed under Corporate Sources at the end of the paper.

These reports and information, collectively referred to as sustainability reports from now on, provided the source material for this paper. The reports were well structured and clearly signposted, and the author took the considered view that a detailed content analysis would be unnecessary in an exploratory study. Rather, a close reading of the source material was undertaken and a number of major themes were identified. As the reports are in the public domain, on the selected companies' websites, the author felt that it was unnecessary to seek formal permission to use them. At times, the author explicitly quotes the selected companies' reports, and here the aim is to add authenticity to the narrative by exploring how the selected clothing retailers publicly expressed, and looked to evidence, their approaches to sustainability, in their own words.

Findings

The sustainability reports posted by the selected retailers varied in scope and content, but rather than reviewing each report in detail, the author looked to identify, and draw out, a number of general themes to provide a narrative account to capture how the clothing retailers are publicly addressing sustainability. More specifically, the author identified a number of overlapping themes, namely, strategic corporate commitment; climate change and greenhouse gas emissions; reducing more general environmental impacts; the circular economy; protecting workers in supply chains; diversity, equity and inclusion; health and safety; and links with communities and charitable donations.

Strategic corporate commitment was articulated in a variety of ways. In his Chief Executive Officer's Introduction to Marks and Spencer's 2023 Sustainability Report, Stuart Machin claimed *'sustainability is part of how we do business at M&S – it's in our DNA'*, and that *'it runs through all our strategic priorities'* (Marks and Spencer 2023). In his Chief Executive's Foreword to ASOS's (2023) report, *'Fashion with Integrity'*, Jose Antonio Ramos, claimed *'we want to continue to give our customers the fashion they want, when they want it. At the*

same time, we want to be a business that cares for people, while working to reduce our impact on the planet. Achieving these aims together is a huge challenge, but it is not impossible. We can and must do both, as we believe that there can be no future for fashion without sustainability.' Perhaps more simply, Tesco (2023) reported 'we remain committed to embedding sustainability across all our business operations.'

All the selected clothing retailers identified climate change as a major, perhaps, the major, challenge to sustainability. Asda (2023), for example, recognised that 'climate change is the defining crisis of our time, it's happening much more quickly than previously anticipated and will have a major impact on our business.' In a similar vein, Tesco (2023) reported 'climate change remains the biggest and most complex challenge facing the world, with its impacts felt across our supply chain, operations, and the communities we serve.' More specifically, some of the selected retailers reported on their greenhouse gas emissions targets. Next, for example, reported its commitment to reduce Scope 1 (which occur within a company and are within its control) and Scope 2 emissions (which occur when energy is produced and supplied from outside the company) by 55% by 2030, against a 2016/2017 baseline, as part of its goal to achieve net zero emissions by 2040. TK Maxx (undated) claimed to be committed to 'continue to reduce our greenhouse gas emissions by implementing energy efficiency initiatives and purchasing renewable energy for our stores, offices, and processing centres.'

The selected retailers' commitments to reducing their more general environmental impact included a number of elements. Tesco (2023), for example, reported 'working to reduce our environmental impact', and more specifically, on its ambition 'to halve the environmental impact of the average shopping basket', by 2030. The John Lewis Partnership (2023) recognised 'nature is the basis of everything we do as individuals, businesses and societies', and claimed 'which is why protecting biodiversity is at the heart of the Partnership.' Primark (2023) reported commissioning a consultancy to conduct a biodiversity risk assessment of its operations and claimed that 'given that cotton is our most widely used raw material, our biodiversity strategy has cotton at its core.'

The clothing retailers' supply chains use large volumes of water, and water stewardship is an important element in managing environmental impact. Primark (2023), for example, acknowledged 'water is a critical natural resource within the fashion industry – from the irrigation of the cotton fields to the dyeing and finishing of our fabrics and materials. It is vital that we manage it effectively. Ensuring factories of our suppliers manage their water use effectively and control their wastewater responsibly, is crucial for helping to reduce our environmental impact as a business.' In reporting on water stewardship, J D Sports (2023) noted that 'the growth and extraction of raw materials, including cotton, are water intensive activities', and that by adopting more sustainable behaviours within its supply chain, the retailer had reduced its water usage and environmental impact.

A commitment to the circular economy was expressed by a number of the selected clothing retailers, but this commitment was often focussed narrowly on waste. Under the banner 'Moving Towards Circularity', Next (2023), for example, reported it was 'supporting the transition to a more circular economy by

designing, producing and selling products that limit pollution and waste, and help to keep materials in use for longer.' In looking to evidence its commitment to circularity Next outlined that it was working to reduce packaging, using customers' returned packaging to create new packaging, and to develop takeback schemes to ensure valuable resources were kept in circulation. The John Lewis Partnership (2023) claimed *'our products and business must be responsible and sustainable, designed with circularity in mind and eradicating waste as we go.'*

Wider commitments to circularity were also expressed by some of the selected clothing retailers. Asda (2023), for example, argued that *'circularity is a key pillar of our George clothing sustainability strategy'*, suggested that its *'customers were more likely than the average UK customer to participate in circular initiatives, such as repairing, donating, buying second-hand and selling used items'*, and claimed that *'as we develop our ranges, we are designing with longevity in mind, aiming to ensure our products last longer, can have a second life, and at the end of life be recycled or disposed of in a responsible and low-impact way.'* JD Sports (2023) reported developing its *'supply chain to extend material and product life at every opportunity'*, and while the company acknowledged that *'this is not circularity by definition'*, it argued that *'extending product life represents an investment in the same principles that support the circular economy.'* Under the headline, *'Recycling and Repairing'*, Sports Direct (2022) offered advice to customers on *'repairing damaged items, giving clothes a second life, and upcycling.'*

Protecting workers in supply chains poses a major challenge for clothing retailers and a number of them have explicitly addressed remuneration and working conditions, health and safety at work, human rights, and modern slavery. Under the banner *'Improving People's Lives'* Primark (2023) acknowledged its commitment to *'pursuing a living wage for workers in our supply chains'*, and reported that *'our approach builds on what is already a well-established process to monitor the payment of workers' wages'*, and that *'this is a key aspect of social audits conducted in our suppliers' factories through our Ethical Trade programme.'* In a similar vein, JD Sports (2022) reported that its ethical code of practice stipulates that *'living wages are paid in line with local laws and for a standard working week, overtime must be paid at premium rate'*, that *'the organisation shall respect the right of personnel to a living wage and ensure that wages for a normal work week, not including overtime, shall always meet at least legal or industry minimum standards, or collective bargaining agreements'*, and that *'wages shall be sufficient to meet the basic needs of personnel and to provide some discretionary income.'* JD Sport's ethical code of practice also emphasises freedom of association and the right to collective bargaining, that working hours must not be excessive and must be voluntary, and that regular employment be provided. Here again, the company reported that factories in its supply chain are independently audited.

Marks and Spencer (2023) reported *'we continuously review and improve our practices to ensure we are upholding our standards and respecting the human rights of the people behind our products. This means working directly with our supplier partners to address local issues, and in collaboration with the wider*

industry to address systemic issues.' Next (2023) reported *'the violation of human rights anywhere in our operations is unacceptable and we deal firmly with any infringements identified in our supply chain.'* Tesco (2023) emphasised its commitment *'to upholding human rights and support in full the United Nations Universal Declaration of Human Rights and the International Labour Organization Core Conventions on freedom of association and collective bargaining, forced labour, child labour and discrimination at work.'* Further, Tesco (2023) reported *'our contractual agreements with suppliers clearly articulate the expected standards related to human rights and modern slavery.'*

Some, but not all, of the selected clothing retailers, reported on their policies on modern slavery. Next (2023), for example, emphasised *'we will not tolerate any instance of modern slavery in our business or in our supply chain. Next products should be made by workers who are treated honestly and fairly for the work they undertake and whose human rights and wellbeing are respected.'* In looking to evidence this commitment, Next (2023) reported that it had *'worked with 13 factories to successfully remediate modern slavery issues'*, and *'an additional four sites are being supported through an agreed remediation process'*, and that it had *'disengaged seven factories where remediation of modern slavery issues had not been achieved to an acceptable level.'* Primark (2023) reported that *'we ban all forms of modern slavery, including child labour, forced labour and human trafficking'*, and that *'we publish our Modern Slavery Statement annually.'* This statement is accessible via a hyperlink from the company's sustainability report.

Health and safety in the workplace were issues for many of the selected clothing retailers and while some of the retailers reported their commitments to their own workers, for others such commitments also included their supply chains. Next (2023), for example, emphasised that *'colleagues' health, safety and wellbeing is always our top priority'*, and that the company *'firmly believe that if our people are healthy, happy and engaged, their performance will be optimised, benefitting both themselves and our business.'* More expansively, JD Sports (2023) claimed *'the health and safety of workers within all areas of our supply chain is of paramount importance to us'*, and that all suppliers will *'establish documented procedures to detect, prevent, minimise and eliminate potential risks to the health and safety of personnel. The organisation shall maintain written records of all health and safety incidents that occur in the workplace and in dormitories provided by the organisation, whether it owns, leases or contracts dormitories from a service provider.'*

A commitment to diversity, equity and inclusion featured in the sustainability reports of many of the selected retailers. ASOS (2022), for example, emphasised its *'aim to drive diversity, equity and inclusion across every aspect of our business'*, while under the headline *'Diversity and Inclusion'*, Marks and Spencer (2023) claimed *'as an employer of more than 64,000 people, M&S is committed to building a culture where everyone is listened to, has a voice and feels they can be their best.'* Under the banner *'Championing Diversity and Inclusion'*, Primark (2023) claimed *'it's important that all our people are treated with dignity and respect, which means listening to our colleagues and learning what's important to*

each person, that *'our workforce is a diverse collection of individuals, all with their own stories, viewpoints, ideas and insights. It makes us a stronger, more adaptive and resilient business'*, and that *'we are also careful to understand local variations and comply with relevant legislation in each market.'* Primark (2023) also reported its commitment to *'promote equal opportunities for women.'* In addressing this commitment, the retailer emphasised that *'women account for the majority of its global supplier factory workforce'*, and that the company's goal is *'to strengthen the position of women in the garment industry through skills development and addressing barriers to progression by 2030'* (Primark 2023).

A number of the selected clothing retailers reported on their links with local communities and on their charitable donations, as part of their sustainability commitments. The John Lewis Partnership (2023), for example, reported that *'Our Community Matters'* programme supported charities and good causes and that its recent focus had been on health and well-being, school holiday food poverty, and vulnerable children. In addressing *'Supporting Our Communities'*, Next (2023) emphasised its commitment *'to support causes that make a real difference. We particularly focus on supporting charities and organisations that have an impact in the countries and communities we source from and operate in'*, and reported on its approach which looked to *'provide donations that are of the most benefit – this can be in the form of financial or product donations, expertise, knowledge, or time'*, and *'to support charities for a number of years with a specified annual donation, as this commitment helps them plan their work with confidence and allows us to become strategic partners.'*

Discussion

The sustainability of the clothing industry, and more specifically of clothing retailing, is increasingly in the public eye, and the findings reported above revealed that the UK's leading clothing retailers publicly addressed a number of environmental and social challenges in their sustainability reports. That said, a wider set of issues, namely, the concept of sustainability and the relative importance of business drivers, vis-a-vis environmental and social sustainability drivers; the aspirational and expectational nature of the clothing retailers' commitments to sustainability; and the relationship between sustainability and economic growth, merit attention and discussion.

At the outset it is important to recognise that sustainability is a contested concept, which *'means different things to different people'* (Aras & Crowther, 2008), and while some definitions are rooted in ecological principles, others include social and economic, as well as environmental, goals, and look to embrace equity in meeting human needs. Typical of the first set is Sutton's (2004) definition of environmental sustainability as *'the ability to maintain things or qualities that are valued in the physical environment'*, while the second set is reflected in McCann-Erickson's (2007) definition that sustainability *'is a collective term for everything to do with the world in which we live'*, and *'is about consuming differently and consuming efficiently.'*

In some ways, the selected clothing retailers' approach to sustainability can be interpreted as being built around economic efficiencies and thus to reflect the demands of their businesses, as much as fundamental concerns for the conservation of natural resources, the maintenance of ecosystems, the well-being of workers, or the communities in which the retailers trade and source their products. While a number of the clothing retailers' various measures to implement efficiencies in the use of both energy resources and water resources, they also produce cost savings. In a similar vein, commitments to diversity and to health and safety in the workplace can be seen to promote loyalty and stability amongst the workforce, while investment in the communities where clothing retailers trade and source their products, will help to produce positive attitudes towards those retailers.

Many of the selected clothing retailers' commitments can be seen to be both aspirational and expectational. Aspirational, in that, many of the sustainability reports map out the retailers' ambitions, for example, for reductions in greenhouse gas emissions, halving the environmental impact of a typical shopping basket, plans to ensure that products last longer, and goals designed to strengthen the position of women and to address barriers to their progression. Whether such commitments can be sustained, in the face of difficult future trading conditions remains to be seen. The clothing retailers' reported commitments to sustainability could also be seen as expectational, in that suppliers were expected to ensure their compliance with the retailer's corporate policies, for example, on the role of women within the garment industry, on ensuring the responsible use and management of water resources, and on human rights and modern slavery. In an attempt to verify that suppliers are complying with their supply chain policies, a number of the selected retailers reported employing a variety of audit processes. Here, it is important to recognise that though widely used in industries with complex and geographically diverse supply chains, the role of auditing to verify compliance has attracted considerable criticism. LeBaron et al. (2017), for example, argued that *'retail and brand companies shape the audit regime in ways that legitimate and protect their business model'*, which *'preserves the retail business model that hinges on rewards from cheap labor, cheap goods, low prices, and short-term purchase contracts.'*

The findings revealed that while some of the selected clothing retailers focussed their commitment to the circular economy narrowly on waste management, others were more broadly focussed on the product life cycle, but any transition to a circular model would constitute a dramatic change in the ways in which consumers approach consumption, and could see the emergence of a *'new consumption culture'* (Korhonen et al. 2018). Indeed, the emergence of such a new culture of consumption where the focus would be on co-operative, rather than individual, endeavour, is seen to be central to the circular economy, with *'user groups and communities sharing the use of the function, service and value of physical products.'* However, there is little evidence in the clothing retailers' sustainability reports that they are committed to fundamental changes in their current business models. While Marks and Spencer, for example, do facilitate a clothes recycling scheme, as noted earlier, at the present time, the company seems

unlikely to radically change their current business model to fully accommodate reuse and recycling, at what would be the expense of that model.

There are, arguably fundamental, tensions between sustainability and economic growth, and here the issues of sustainable consumption and the current structure of market economies loom large. In many ways, clothing retailing and more particularly fast fashion, epitomises unsustainable consumption. The selected clothing retailers' business models, are based on continuing growth and aggressive marketing strategies, essentially to promote consumption, but such growth, dependent as it is on the continuing depletion of the earth's finite natural resources, is incompatible with sustainability. However, major moves to reduce current levels of consumption in western societies, could be seen by many as a retrograde step, in societies where consumption is prized, and perhaps more tellingly, where consumption has become part of many people's identity. Major changes in the levels of consumption might also be seen to pose challenges for the current structure of market economies. In looking to address such challenges Jackson (2010) argued '*it is entirely fanciful to suppose that deep emission and resource cuts can be achieved without confronting the structure of market economies*', while Mansfield (2009) claimed that mainstream approaches to sustainable development fail to recognise '*the political nature of sustainability*.'

Conclusion

This paper has presented an exploratory narrative on how the UK's top ten clothing retailers are publicly addressing their approaches to sustainability. Such approaches embrace a wide range of issues, namely, strategic corporate commitment; climate change and greenhouse gas emissions; environmental protection; the circular economy; protecting workers in supply chains; diversity, equity and inclusion; health and safety; and links with communities and charitable donations. More generally, the author offered three sets of the reflections focused on the different meanings of sustainability and the relative importance of business drivers vis-à-vis environmental and social sustainability drivers; the aspirational and expectational nature of many of the selected companies' commitments to sustainability; and tensions between sustainability and economic growth. All three sets of reflections have important implications for clothing retailers as they look to pursue the transition to a more sustainable future, and to respond to environmental and social challenges the clothing industry increasingly faces from its stakeholders, and from the public at large.

The paper has a number of limitations, not least in that it is drawn exclusively from Internet sources, in that it involves the authors' selection from these sources, and that in offering a narrative of how the selected clothing retailers publicly addressed sustainability, it involves considerable generalisation. Nevertheless, the author believes that the paper not only offers a valuable exploratory picture of the sustainability challenges facing clothing retailers within the UK, and of the corporate strategies and measures to address these challenges, but that it may also provide a platform for future research. Future research agendas might, for

example, include detailed empirical investigations into how UK' leading clothing retailers are looking to develop their sustainability strategies .At the same time, research into UK consumers' perceptions of the nature and importance of sustainability for clothing retailers, and into the extent to which consumers may be willing to change their patterns of buying behaviour and store patronage in the light of increasing awareness of the varied environmental and social challenges facing clothing retailers may also pay dividends.

References

- Abbate S, Centobelli P, Cerchione R, Nadeem SP, Riccio E (2023) Sustainability trends and gaps in the textile, apparel and fashion industries. *Environment, Development and Sustainability*. Retrieved from <https://link.springer.com/article/10.1007/s10668-022-02887-2> (Accessed 4 February 2024)
- Aras G, Crowther D (2008) Governance and Sustainability: An Investigation into the Relationship between Corporate Governance and Corporate Sustainability. *Management Decision*, 46(3): 433-448
- Arrigo E (2020) Global Sourcing in Fast Fashion Retailers: Sourcing Locations and Sustainability Considerations. *Sustainability* 12(2) Retrieved from <https://www.mdpi.com/2071-1050/12/2/508> [Accessed 31 October 2023]
- Botwinick A, Lu S (2023) Explore US retailers' merchandising strategies for clothing made from recycled textile materials. *International Journal of Fashion Design, Technology and Education* 16(2): 131-140
- Bostrom M, Micheletti M (2016) Introducing the Sustainability challenges of Textiles and Clothing. *Journal of Consumer Policy* 39: 267-375
- Brydges T (2021) Closing the loop on take, make, waste: investigating circular economy practices in the Swedish fashion industry. *Journal of Cleaner Production* 15 Retrieved from <https://www.sciencedirect.com/science/article/pii/S0959652621004650> [Accessed 1 November 2023]
- Byrd K, Su J (2022) Investigating consumer behaviour for environmental, sustainable and social apparel. *International Journal of Clothing Science and Technology* 33(3): 336-352
- Claxton S, Kent A (2020) The management of sustainable fashion design strategies: an analysis of the designer's role. *Journal of Cleaner Production* 268 Retrieved from https://www.sciencedirect.com/science/article/pii/S0959652620321594?casa_token=jCIqW8_o0G4AAAAA:sGac92qKQ5zaXb1SCvZ3WT3J1a74vvj9Z7atTJbGpHe2IGQ71WIpL-bkm1_azmG_ifgt1_Sr9_JL (Accessed 4 February 2024)
- D'Adamo I, Lupi G, Morone P (2023) Towards the circular economy in the fashion industry: the second-hand market as a best practice of sustainable responsibility for businesses and consumers. *Environmental Science Pollution Research* 29: 46620-46633 Retrieved from <https://doi.org/10.1007/s11356-022-19255-2> [Accessed 2 November 2023]
- Dangelico A, Alvino L, Fraccascia L (2022) Investigating the antecedents of consumer behavioural intention for sustainable fashion: Evidence from a large survey of Italian consumers.' *Technological Forecasting and Social Change*, 185, Retrieved from <https://www.sciencedirect.com/science/article/pii/S0040162522005315> (Accessed 5 February 2024)
- de Oliveira LG, Miranda FG, de Paula Dias (2022) 'Sustainable practices in slow and fast fashion stores: What does the customer perceive?' *Cleaner Engineering and*

- Technology 6, Retrieved from <https://www.sciencedirect.com/science/article/pii/S2666790822000180#:~:text=The%20fast%20fashion%20segment%20aims,order%20to%20attract%20consumer%20attention>. (Accessed 5 February 2024)
- Frei R, Jack L, Kryzaniak SA (2022) Sustainable reverse supply chains and circular economy in multichannel retail returns, *Business Strategy and the Environment* 29(12) Retrieved from https://www.researchgate.net/publication/339202492_Sustainable_reverse_supply_chains_and_circular_economy_in_multichannel_retail_returns (Accessed 6 February 2024)
- Dissanayake DGK, Weerasinghe D (2022) Towards Circular Economy in Fashion: Review of Strategies, Barriers and Enablers. *Circular Economy and Sustainability* 2: 25-45
- Frei R, Jack L, Kryzaniak SA (2022) Sustainable reverse supply chains and circular economy in multichannel retail returns, *Business Strategy and the Environment* 29(12) Retrieved from https://www.researchgate.net/publication/339202492_Sustainable_reverse_supply_chains_and_circular_economy_in_multichannel_retail_returns (Accessed 6 February 2024)
- Jackson T (2018) Governance for Prosperity. *Review of Economic Philosophy* 11(1): 11-33
- Jung S, Jin B (2016) Sustainable Development of Slow Fashion Businesses: Customer Value Approach. *Sustainability* 8(6) retrieved from <https://www.mdpi.com/2071-1050/8/6/540> [(Accessed 1 November 2023)]
- Korhonen J, Honkasalo A, Seppala J (2018) Circular Economy: The Concept and its Limitations. *Ecological Economics* 143(1): 37-4
- LeBaron G, Lister J, Dauvergne P (2017) Governing Global Supply Chain Sustainability through Ethical Audit Regime. *Globalizations* 14(6): 958-975
- MacCarthy BL, Jayarathne PGSA (2011) 'Sustainable collaborative supply networks in the international clothing industry: a comparative analysis of two retailers', *Production Planning and Control*, Vol. 23, No. 4, pp. 252-268
- Mansfield B (2009) *Sustainability' in Castree*, N., Demeriff, D., Liverman, D. and Rhoads, B. (eds) *A Companion to Environmental Geography*. London: Wiley: 37-49
- McCann-Erickson (2007) *Can Sustainability Sell?* Retrieved from http://www.rumbosostenible.com/wp-content/uploads/MCCann_Can-sustainability-sell.pdf?257bb3 [Accessed 10 March 2023]
- Peters J, Simaens A (2023) Integrating Sustainability into Corporate Strategy: A Case Study of the Textile and Clothing Industry. *Sustainability* 12(15) Retrieved from <https://www.mdpi.com/2071-1050/12/15/6125> (Accessed 10 January 2024)
- Niinimäki K, Peters G, Dahlbo H, Perry P, Rissanen T, & Gwilt A (2020) The environmental price of fast fashion. *Nature Reviews: Earth and Environment* 1: 89-200
- Retail Economics (2023) *UK Top Ten Retailers: Clothing and Footwear*. Retrieved from <https://www.retailereconomics.co.uk/top-10-retailers-clothing-and-footwear> [Accessed 2 November 2023]
- Seock YK, Shin J, Yoon Y (2024) 'Embracing environmental sustainability consciousness as a catalyst for slow fashion adoption', *Sustainable Development*. Retrieved from <https://onlinelibrary.wiley.com/doi/full/10.1002/sd.2889> (Accessed 5 February 2024)
- Statista (2023) Number of specialized stores for the retail sale of clothing in the United Kingdom 2023, by employment size band. Retrieved from <https://www.statista.com/statistics/476705/uk-united-kingdom-clothing-retailers-by-employment-size/> [Accessed 2 November 2023]

- Sutton P (2004) *A Perspective on Environmental Sustainability*. Retrieved from <https://www.donbosco.go.org/images/pdfs/energy/A-Perspective-on-Environmental-Sustainability.pdf> [Accessed 12 March 2023]
- Talay C, Oxborrow L, Goworek H (2022) The impact of asymmetric supply chain relationships on sustainable relationships in the fashion and textiles industry. *Journal of Business Research* 152: 326-225
- Vadakepatt GG, Winterich KP, Mittal V, Zinn W, Beitelspacher L, Aloysius J, Ginger J, Reilman J (2021) Sustainable Retailing. *Journal of Retailing* 97(1): 62-80

Corporate Sources

- Asda (2023) *Environmental, Social and Governance Report*. Retrieved from <https://asda.groceries.scene7.com/is/content/asdagroceries/Asda.com/7.%20Sites/Creating%20Change%20for%20Better/Asda-ESG-Report-2023.pdf> [Accessed 2 November 2023]
- ASOS (2022) *Fashion with Integrity: Progress Update*. Retrieved from https://www.johnlewispartnership.co.uk/content/dam/cws/pdfs/Juniper/ethics-and-sustainability/PR2023/Ethics-and-Sustainability-Report-2022_23.pdf [Accessed 2 November 2023]
- JD Sports (2023) *Annual Report and Accounts 2023*. Retrieved from <https://www.jdplc.com/sites/jd-sportfashion-plc/files/2023-05/jd-annual-report-and-accounts-2023.pdf> [Accessed 2 November 2023]
- Marks and Spencer (2023) *Reshaping M&S; Sustainability Report 2023*. Retrieved from <https://corporate.marksandspencer.com/sites/marksandspencer/files/sustainability-report-2023.pdf> [Accessed 2 November 2023]
- Next (2023) *Corporate Social Responsibility Report*. Retrieved from <https://xcdn.next.co.uk/PDFS/next-cr-report.pdf> [Accessed 2 November 2023]
- Primark (2023) *Primark Sustainability and Ethics Report 2021/22*. Retrieved from <https://primark.a.bigcontent.io/v1/static/Primark-Sustainability-and-Ethics-Report-2021-22> [Accessed 2 November 2023]
- Sports Direct (2022) *A Cleaner Shade of Green*. Retrieved from www.jdplc.com/sites/jd-sportfashion-plc/files/2023-05/jd-annual-report-and-accounts-2023.pdf [Accessed 2 November 2023]
- Tesco (2023) *Annual Report and Financial Statements 2023*. Retrieved from <https://www.tescopl.com/media/u1wlq2qf/tesco-plc-annual-report-2023.pdf> [Accessed 2 November 2023]
- The John Lewis Partnership (2023) *Ethics and Sustainability Report 2022/23*. Retrieved from https://www.johnlewispartnership.co.uk/content/dam/cws/pdfs/Juniper/ethics-and-sustainability/PR2023/Ethics-and-Sustainability-Report-2022_23.pdf [Accessed 2 November 2023]
- TK Maxx (undated) *Environment*. Retrieved from <https://www.tkmaxx.com/uk/en/about-tkmaxx/corporate-responsibility/environment> [Accessed 2 November 2023]