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FAST FASHION AND SUSTAINABILITY. THE CASE OF SHEIN

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ABSTRACT

The purpose of this work is to address sustainability in the fast fashion industry, particularly with the emergence of ultra-fast fashion. Lately, many fast fashion brands claim to be "sustainable", "ethical" or "green", while in reality they continue to engage in unsustainable practices.

The popularity of brands like SHEIN leads to overconsumption and a throwaway culture which causes waste, pollution and violation of human rights.

This work also examines current legislation and regulation proposals in the European Union and the United States to explore the potential impact of binding legal action on companies. Besides, the importance and significance of consumer behavior is addressed throughout the work.

The work was conducted by studying the available literature, publications, news and third-party investigations, while at the same time looking at the information of the fast fashion companies' official websites.

KEY WORDS: Fast fashion, consumption, sustainability, SHEIN, Tik Tok

RESUMEN

El propósito de este trabajo de fin de grado es tratar el tema de la sostenibilidad en la industria de la moda rápida, especialmente teniendo en cuenta la aparición de la moda ultrarrápida. Recientemente, muchas marcas de moda rápida afirman ser "sostenibles", "éticas" o "verdes", mientras que en realidad siguen involucradas en prácticas insostenibles.

La popularidad de marcas como SHEIN lleva al sobreconsumo y a una cultura de desecho que causa desperdicio, contaminación y contribuye a las violaciones de los derechos humanos.

El proyecto examina también la legislación y las propuestas regulatorias actuales en la Unión Europea y en Estados Unidos para explorar el impacto potencial que podrían tener estas acciones legales en las empresas. Asimismo, la importancia del comportamiento del consumidor se aborda a lo largo del trabajo de fin de grado.

El trabajo se realizó estudiando la literatura disponible, publicaciones, noticias e investigaciones de terceros, mientras que al mismo tiempo se analizaba la información presente en los sitios web oficiales de las marcas de moda rápida.

PALABRAS CLAVE: Moda rápida, consumo, sostenibilidad, SHEIN, Tik Tok

Table of Contents

1. INTRODUCTION	1
2. THE FAST FASHION INDUSTRY	3
2.1 Ultra-fast fashion	6
3. SUSTAINABILITY IN THE FAST FASHION INDUSTRY	9
3.1 Forced labor and labor rights	12
3.2 Environmental pollution	14
3.3 Can fast fashion ever be considered as sustainable? The importance of consumer responsibility	16
4. THE CASE OF SHEIN	18
4.1 Company history, mission and vision	19
4.2 Business model and success	19
4.3 Corporate Social Responsibility	21
4.4 Ethics, sustainability, transparency and controversy	24
5. LEGISLATION	26
5.1 Current legislation	27
5.2 European Union	28
5.3 United States	30
6. CONCLUSIONS	32
7. REFERENCES	34

1. INTRODUCTION

Today, the fashion industry is the third biggest manufacturing industry in the world (Zhang et al., 2021), and is the second most polluting industry in the world (McKinsey & Company, 2021). It is commonly associated with excessive consumption, a growing waste problem, environmental pollution and the exploitation of workers in the global supply chain (Changing Markets, 2021), and by the year 2050, it is expected to be responsible for one-fourth of the world's remaining carbon budget (United Nations Environment Program, 2018).

Fast fashion is a segment within the fashion industry, and the concept gained popularity in the early 2000s as a result of the business strategies of global retailers such as Zara and H&M, who aimed to make trendy and fashionable clothing more accessible and affordable to people in their everyday lives (Papasolomou et al., 2023). The success of fast fashion is due to its ability to provide the latest fashion trends within a brief period of approximately five to six weeks (Levy and Weitz, 2008), therefore allowing consumers to buy stylish clothes in an inexpensive and easy way (Joy et al., 2015). The global fast fashion market is expected to grow to \$133.43 billion in 2026 (Research and Markets, 2022). We are currently consuming more clothes per capita than ever before while wearing them less (Changing Markets, 2021), and the emergence of ultra-fast fashion retailers like SHEIN, which adds around 2,000 new items to its website every day (Langer, 2021), speeding up the process even more, contributes to one of the biggest issues of fast fashion: overproduction and overconsumption (Cernansky, 2021).

Sustainability is becoming a popular trend in the fashion industry. Sustainable fashion aims to incorporate ethically and environmentally conscious methods in all stages of production, while also giving utmost importance to the welfare of workers engaged in the supply chain (Henninger et al., 2016). However, the fast fashion industry is based on offering cheap garments, and this is possible because costs are kept low. Costs are reduced by using cheap labor with poor working conditions and lack of safety in developing countries, with around 96% of fashion brands not disclosing the quantity of workers within their supply chain who are receiving a wage that supports a decent standard of living (Fashion Revolution, 2022). Besides, the industry is not environmentally sustainable, emitting more greenhouse gas than all international flights and maritime shipping together (Ellen MacArthur Foundation, 2017), being the second largest industry

most dependent on water (Maiti, 2022) and creating yearly tons of clothing waste all around the world (WPTV, 2022).

Even though existing regulations are not enough to solve the environmental issues caused by the industry, and modern slavery legislations do not end up eradicating forced labor in the supply chains (James, 2022), progress is slowly taking place through new regulations and an increasing awareness among consumers and stakeholders, although there is still much work to be done especially in the areas of workers' rights and environmental protection.

In the European Union and the United States, governments have brought strategies and proposals which, if legally binding, would imply a significant change towards sustainability in the fast fashion industry. For example, if approved, the EU Strategy for Sustainable and Circular Textiles would introduce several requirements which would mandate companies to increase durability and reusability of textile products, while obligating them to use recycled fibers (European Commission, 2022), forcing fashion brands to change their supply chains if they want to export to the European Union (Shao, 2022). Similarly, several proposals in the United States, such as the Fashion Act, would make New York the first state to force fashion brands to disclose information regarding 50% of their supply chains (Cernansky, 2022). The existing Uyghur Forced Labor Prevention Act (UFLPA) prohibits imports of goods from the Chinese Xinjiang Uyghur Autonomous Region as a measure to fight forced labor (U.S. Department of State, 2022), and has already affected companies like SHEIN, which was asked to inform about the use of cotton sourced from Xinjiang (Business of Fashion, 2023).

The aim of this work is to show the current state of the fast fashion industry and the rise of the ultra-fast fashion industry, especially favored by the Covid-19 pandemic with the switch towards a more digitalized business strategy (Bottini, 2021), and to address the sustainability topic in the industry. In addition, this work provides an analysis of the company SHEIN due to its current boom and influence on the fashion industry. This work tries to contribute to raising consumer awareness and encouraging individuals to adopt conscientious, responsible and sustainable purchasing habits when buying clothes.

2. THE FAST FASHION INDUSTRY

During the last 40 years, the fashion industry worldwide has been deeply transformed as a consequence of several changes in the business environment. The concept of fast fashion, which can be defined as inexpensive and low quality clothes that are quickly produced and are cycled in and out the market rapidly to meet new trends (Lai, 2021), was established during the 90s decade, when retailers saw the need to update their products and respond faster to the newest fashion trends, as a consequence of the rise in consumer's demand. Retailers started to focus more on providing quick responsiveness while at the same time controlling costs. Consequently, taking advantage of the increasing globalization of production, they started to offshore manufacturing to countries with low labor costs and few environmental regulations, benefiting from a cost advantage (Bhardwaj and Fainhurst, 2010). When a company engages in offshoring solely for economic reasons, ethical concerns may arise as it is not always certain that the working conditions in the foreign country meet appropriate standards (Caro and Martínez-de-Albéniz, 2015).

Today, the fashion industry is one of the most labor dependent industries and has one of the largest and most complex chains of production and consumption (Ross and Morgan, 2015). Fast fashion companies have built global production networks and rely on diverse offshore suppliers, although it is important to point out that they all depend on a local network of suppliers as well. Overall, fast fashion retailers tend to carry out a dual sourcing strategy (local and global sourcing), based on cost and time criteria (Bruce and Daly, 2006).

Besides outsourcing, fast fashion retailers also rely on subcontracting. When they outsource production to developing and undeveloped countries, the supplier firms then subcontract this production to other manufacturing companies. This subcontracting is not officially permitted by the fast fashion brands which initially outsource. Therefore, without authorization, big retailers are not responsible for ensuring that the working conditions are legal and decent. These unpermitted subcontractors are not registered and work without direct government regulation. Production targets are extremely high, so garment workers are usually exploited and experience violence when they do not meet the targets, while receiving insignificant wages. Moreover, subcontracting is based on short-term contracts, so workers are easily hired and fired (Stafford, 2018).

Offshoring and subcontracting raise many ethical concerns, since factory working conditions in the countries where production takes place are not appropriate. In 2013, due to the collapse of the Rana Plaza factory in Bangladesh, which supplied materials for large fast fashion retailers, and caused the death of more than 1,000 employees, fast fashion companies felt the urgency to focus more on corporate social responsibility (CSR) issues, the environment and sustainability (Auke and Simaens, 2019), and to increase transparency in their supply chains (Fraser and van der Ven, 2022). However, it is undeniable that fast fashion is unsustainable by nature, since it promotes low durability, low quality, excessive consumerism and low-cost production which means low salaries in the manufacturing third world countries (Arrigo, 2021).

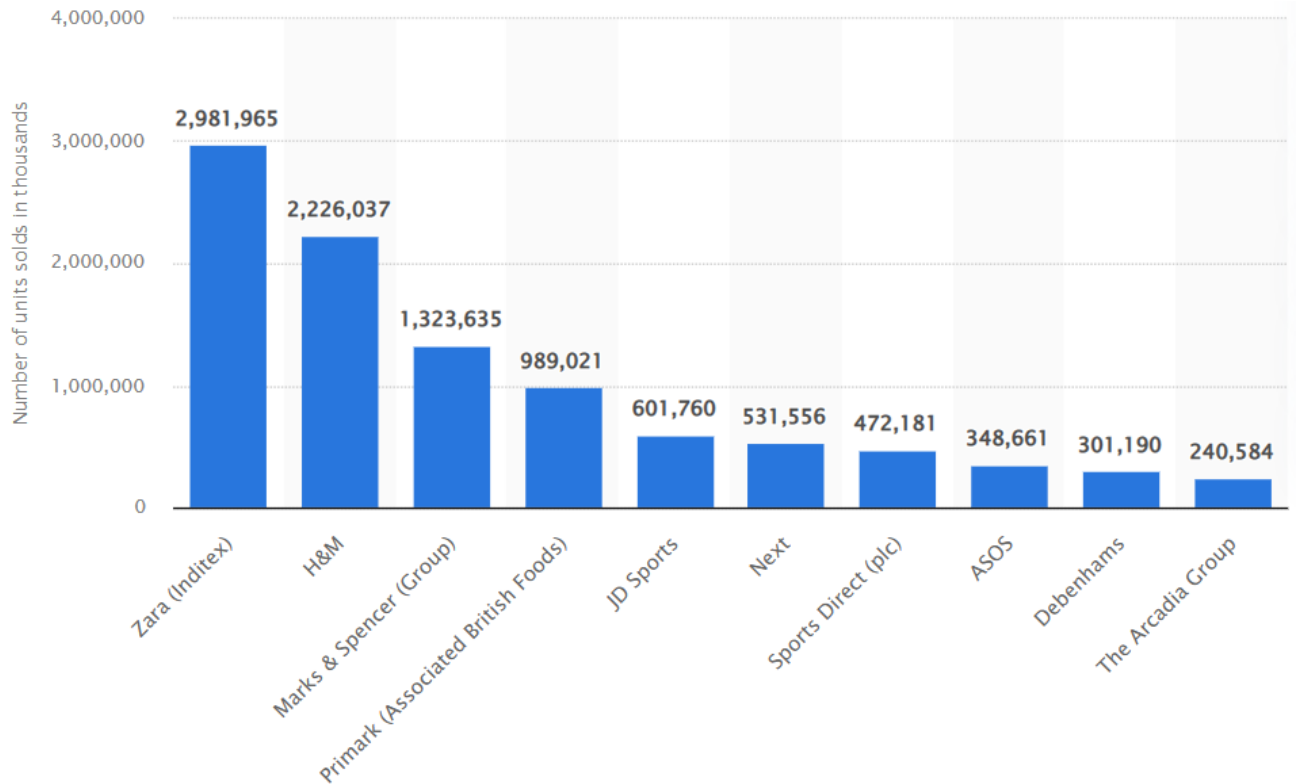
Flexibility is crucial, because retailers have to be able to adapt and respond to the changing consumer preferences before competitors do so (Barnes and Lea-Greenwood, 2006). Technology and the availability of information is essential to generate reliable fashion forecasts. The fast fashion production chain is composed of five pillars: commodities, component supply, production networks, sales channels and marketing networks (Gereffi and Appelbaum, 1994). The concept of quick response (QR) is part of the business strategy, useful to avoid risky or uncertain production decisions and to manage excess inventory in the supply chain (Caro and Martínez-de-Albéniz, 2015).

The global fast fashion industry is expected to reach a market value of \$133.43 billion in 2026, and Western Europe is the largest market for fast fashion, followed by Asia Pacific (Research and Markets, 2022). Some examples of major key players in the sector are H&M, Inditex, Fast Retailing (which includes Uniqlo), Forever 21, GAP, Mango, C&A or Primark.

The sector is highly competitive and, in order to make money, speed is key. Fast fashion enables consumers to have more style options at a cheaper price. Thanks to technology, consumers are exposed to social media and apps which enable them to access large amounts of information regarding the latest fashion trends and celebrities style. As a result, the ability to detect trends fast is essential to succeed. This is known as the concept of "see now, buy now". A clear example is fast fashion leader, Zara, which belongs to multinational Inditex, and offers new clothes 26 times a year (which means every 2 weeks), rather than just at the usual 4 seasons: fall, winter, spring and summer (Weinswig, 2017). In recent years, production of clothing has more than doubled, and our per capita consumption of clothing has reached unprecedented levels (Changing Markets, 2021).

Figure 1 shows the leading fast fashion brands in Europe in the year 2019, with Zara ranking first.

Figure 1. Leading 10 European fast fashion brands based on units sold per year worldwide in the financial year 2018/2019 (in 1,000s)



Source: Statista (2021)

Social media has changed the way society consumes, and this has become very notable in the fashion sector. Brands can connect with customers through digital platforms such as Instagram, Facebook or TikTok, boosting social media marketing and word of mouth which can become viral. Moreover, influencer marketing is also a tool for fashion brands to impact consumers purchasing decisions and make consumers more loyal and trustworthy (Shuda and Sheena, 2017). Many fashion followers take celebrity culture and luxury fashion as an inspiration to buy similar styles at more affordable prices. As a result, when consumers see a new style on social media, they want it immediately. Since fashion trends rapidly change, shoppers buy at the store that offers the clothes the cheapest and fastest. The fast fashion business model can be summarized in 3 main points: quick response, constant variety of styles and affordable prices (Caro and Martínez-de-Albéniz, 2015). This creates a pattern of overconsumption, with customers acquiring low priced fashion according to the latest trends. It is no surprise that cheap clothes imply poorer quality. As a matter of fact, fast fashion companies themselves claim that their products

last around ten washes, meaning that after several washes it is not expected that clothes will keep the quality they originally had (Joy et al., 2015).

Therefore, continuously buying and throwing away creates a big environmental problem. It is expected that by the year 2030, 134 million tons of textile waste will be produced every year (Lai, 2021). Most clothing waste ends up in places like Ghana or Chile, negatively affecting local communities (Fashion Revolution, 2022). The Atacama Desert, in Chile, has become a global garbage dump. Around 30 thousand tons of clothes are in illegal landfills in this desert, and the only solution is to burn these clothes, generating harmful smoke pollution that is directly inhaled by the populations living inside the dump (BBC News, 2022). The fashion industry is responsible for 2% to 8% global carbon emissions, while it is also the world's second largest consumer of water. Many harmful chemicals are released into the air and water during the production of clothes, as well as in dyeing and finishing the products. If only textile production is taken into account, greenhouse gases emissions are estimated to be 1.2 billion tons yearly (United Nations Environment Programme, 2018).

The main issue regarding fast fashion is therefore its business model: retailers must continually offer new collections which are trendy and affordable, because the more products sold, the more profit they will make. Consequently, the environment suffers the consequences of cheap clothes. As a result, investing in more sustainable production methods and producing less clothing (reducing the number of yearly fashion seasons), among many possible solutions, would help in the waste problem. However, even though fast fashion companies have recently implemented more sustainable practices in their business strategies, the truth is that they have little incentive in switching such a beneficial polluting business model.

2.1 Ultra-fast fashion

New fashion retailers have managed to speed up the supply chain process so that new garments are introduced every week. Freshness is an important concept, meaning the ability to continuously offer new garments, and the idea that "there is always something new", and this stimulates demand from buyers (Chen et al., 2022). The business model is a direct-to-consumer business model where clothes are manufactured on an on-demand basis. Some major ultra-fast fashion retailers are Boohoo, SHEIN or Fashion Nova, characterized by their capacity to quickly detect and respond to the demand of new

fashion trends and offering new collections with high frequency. Overall, it can be said that the main difference between fast fashion and ultra-fast fashion is that the latter produces and delivers the products faster and more frequently. A case study by VICE UK in 2020 showed that online British retailer Boohoo, founded in 2006, uploaded around 772 new garments in one week (O'Neill, 2020). Fashion Nova, which was born in California in 2006, is mostly known as an "Instagram brand", and releases over 1,000 new styles every week. As the CEO of the brand stated in 2018, "girls need over 50 denim jackets, not just one", emphasizing on the idea that each garment is supposed to be worn once (Hughes, 2018). Chinese digital giant SHEIN, which was created in 2008, adds around 2,000 new items every day for as little as 3 dollars (Kim and Kupelian, 2021).

Social media has eased the designing step since it provides a lot of inspiration for popular current trends. In fact, social media is key for the success of ultra-fast fashion because it gathers customers feedback, which is translated into consumer data and analysis. Social media is also mainly used to promote the products. Promotion and marketing through celebrities and influencers is part of the strategy. Influencers post samples of clothes on their social media accounts and the companies produce the garments few days after depending on the reaction of the audience. Consequently, it is very important that in order to speed up the process, manufacture takes place close to the retailers headquarters or consumers markets. By setting production close to key markets, making the design and manufacturing processes faster, and by fully relying on technology, there are no shortages or excess of inventory (Ramos, 2018).

Table 1 shows the number of followers and views of the 3 ultra-fast fashion retailers mentioned above: Boohoo, Fashion Nova and SHEIN.

Table 1. Instagram followers and Tik Tok followers and views of Boohoo, Fashion Nova and SHEIN (February, 2023)

	Boohoo	Fashion Nova	SHEIN
Instagram followers (02-2023)	13.1 M	21.4 M	27.6 M
TikTok followers and views (02-2023)	1.3 M (11.3 M likes) #boohoo on Tik Tok: 637.2 M views	3.9 M (32.6 M likes) #fashionnova on Tik Tok: 4.6 B views	6.2 M (40.8 M likes) #shein on Tik Tok: 50.1 B views

Source: Author (data taken from Instagram and Tik Tok)

To be competitive in our current digitalized world, fashion firms have to develop new strategies in online channels, which mostly have to do with social media tactics for its target market: young consumers. The Covid-19 pandemic favored the increase in the use of social media and considerably benefited those fashion brands who redesigned their marketing strategy in order to strengthen customer relationships. In fact, the pandemic put the fashion industry to the test: there was a crisis in the industry which affected companies, employees and suppliers. Due to lockdowns and quarantines, stores were forced to close, and visits to physical stores were considerably reduced. Besides, tourism disappeared, supply chains were paralyzed and in the time of the pandemic, fashion was not a priority for consumers, so this implied a change of consumer behavior. During 2020, almost three quarters of listed companies in the fashion industry lost money (Bottini, 2021). In fact, according to McKinsey Global Fashion Index analysis, fashion companies suffered approximately a 90% decline in profits that same year (McKinsey & Company, 2021). The only advantage that the pandemic brought was switching to a more digitalized business strategy, accelerating the digital transformation in the industry, and this was a great opportunity for ultra-fast fashion retailers. More specifically, social media is the key tool to connect with buyers and enhance customer relationships (Bottini, 2021). Tik Tok was the most downloaded app in the year 2020 (BBC News, 2021), and in the year 2022 it had 672 million users (Koetsier, 2023). As it will later be explained in the final degree project, the link within Tik Tok and ultra-fast fashion retailer SHEIN is very relevant, since SHEIN is highly promoted in this social network and has been able to expand its popularity. In 2022, with 229 million downloads all over the world, SHEIN was the most downloaded shopping app, outperforming competitors (Koetsier, 2023). A section of this final degree project is completely devoted to the case of SHEIN.

The sales and growing success of ultra-fast fashion retailers proves that consumers are still attracted to cheap garments and do not take into account its environmental and social impacts. Even though the majority of ultra-fast fashion retailers claim to be sustainable and ethical, producing garments so frequently, with poor quality and such low prices has severe environmental consequences. Besides, most ultra-fast fashion brands fail to disclose information regarding employee's wellness and forced labor. In 2020, an investigation showed that Boohoo workers in a supplier factory in Leicester were paid £3.50 per hour, when the British national living wage is £8.72. Moreover, they were working without the health safety conditions needed due to Covid-19. Most workers were

Asian women immigrants. The retailer stated that the factory in Leicester was not a direct supplier, and that they would start an investigation and terminate contracts with suppliers exploiting garment workers. The company's market value fell considerably, and many influencers stopped supporting the company (Paton, 2020). Last year, Fashion Nova was fined \$4.2 million because it was accused of blocking customer reviews lower than 4 stars and automatically publishing fake 5-star reviews (Barrabi, 2022). However, the biggest scandals come from SHEIN, which will be later explained in depth. As an example, a report in 2021 informed that garment workers in Guangzhou, China, were working 75 hours a week (Jones, 2021). Last summer, Tik Tok videos went viral because users were claiming to receive messages begging for help such as "SOS" or "Help me", found in SHEIN clothing tags (Clark, 2022).

Even though several investigations, facts and allegations prove that ultra-fast fashion brands are neither sustainable nor ethical, they have taken some actions to attempt to be seen as sustainable. Boohoo has its UP.FRONT sustainability strategy, which aims to use more sustainable materials and reduce waste, although no clear data is provided on its achievements or specific targets (Boohoo, n.d.). In its Human Rights Policy, SHEIN commits to work with suppliers that respect human rights and worker's protection, and to respect environmental laws in order to support local communities (SHEIN, 2022).

Is, therefore, sustainability a trend which fast fashion and ultra-fast fashion retailers want to follow to improve their social image? Are real sustainable actions taking place or are we witnessing greenwashing strategies? The next section of the final degree project intends to assess sustainability in the fast fashion industry.

3. SUSTAINABILITY IN THE FAST FASHION INDUSTRY

Sustainability is becoming a hot topic in the fashion industry. Sustainable fashion aims to promote worker empowerment across the entire supply chain, while utilizing practices such as upcycling, recycling, and traditional production methods, as well as incorporating renewable and organic materials. In other words, sustainable fashion seeks to implement ethical and environmentally responsible practices throughout the production process, while also prioritizing the well-being of workers involved in the supply chain (Henninger et al., 2016). While fast fashion consumerism is still very strong, especially due to digitalization and success of social media strategies, more and more consumers are taking

action and are becoming more interested in seeking sustainable fashion as a way to protect the environment and labor rights of workers (Sanghi, 2022). Recently, many fast fashion companies have begun to claim that they are sustainable. Fashion firms are more engaged in CSR operations regarding the environment and labor conditions. For instance, many have introduced approaches to commit to a circular supply chain management (CSCM) based on the 3R (recycle, reuse and remanufacture) concepts (Manickam and Duraisamy, 2019). The key question here is: Is sustainability a trend? Many companies have been accused of greenwashing, which means marketing themselves as being sustainable by using words such as "organic", "environmentally friendly" or "green", while in reality little effort is being made in reducing the environmental impact, which creates misleading information for consumers (Robinson, 2022). In 2019, Swedish giant H&M was investigated by the Norwegian Consumer Authority because it stated that H&M provided too little information about the brand's Conscious Collection's level of sustainability. Several independent investigations, such as the one made by Big Issue, revealed that more damaging synthetic materials were used in the Conscious Collection compared to H&M's main clothing line (Percy, 2021). The company also received criticism for not providing details when it launched the initiative of recycling consumer's old garments. However, as the company claims in its latest annual report, it wants to lead the change into circular fashion and climate positive business, and has been keeping up with its commitment of being fair and inclusive (H&M Group, 2021).

It can be seen that there is a general effort in the fast fashion and ultra-fast fashion industries to be more sustainable, or at least to seem more sustainable. The first step towards differentiating greenwashing from real sustainable practices is transparency (Kaner, 2021). As a result, retailers have to commit to being transparent, because it allows consumers, governments and NGOs to check whether there is sustainability in the business practices or not. Transparency is also a way to address climate change and labor rights (Fashion Revolution, 2022). After the Rana Plaza factory collapse, the Fashion Revolution Movement was founded, and it is nowadays the largest fashion activism platform worldwide. Since 2016, it publishes the Fashion Transparency Index (FTI), reviewing around 250 fashion brands and providing an accurate measure of transparency in the industry. It is made up of 246 indicators such as animal welfare, biodiversity, chemicals, climate, due diligence, forced labor and gender equality, among many other indicators (Kaner, 2021). In 2022, H&M had a transparency score of 66%, one of the top

10 scores. For this same year, Uniqlo scored 49%, GAP and Mango scored 44% and Inditex scored 43% (Fashion Revolution, 2022).

Nowadays there are many examples of fashion brands which aim to be sustainable. It all starts with sustainable design. Since 2009, ECOALF, founded in Madrid by Javier Goyeneche, has been the perfect example of an environmental fashion brand. Marine garbage, especially waste such as plastic bottles, fishing nets, tires, etc. is recycled through innovative processes and transformed into quality threads and fabrics to create garments. Driven by sustainability, the company aims to become net zero in 2030, is 100% transparent in its practices and works hard in transmitting the ECOALF culture and being a referent in sustainable fashion. The company uses 74% of recycled materials in its fashion collections (ECOALF, 2021).

Design with second hand is also a key aspect. Several brands collect unused and unwanted clothes to give them a second life. Some examples are the H&M Garment Collecting program in partnership with I:Collect, a recycling logistics company, Levi's and I:CO, which provides bins to select wearable clothes for either second use or recycling or Patagonia, which even offers repair services to customers to extend the use of garments.

The use of sustainable raw materials and sustainable store designs are also part of the strategy. For instance, Under Armour's stores are part of a green building program where all elements of the physical store are sustainable (led lights, recycled floor, chemical free paint in the walls, etc.).

Labels and packaging also contribute to being more environmentally friendly. All Inditex brands got rid of plastic bags in 2018, and recycled paper bags cost 10 cents. H&M commits to reduce plastic packaging by 25% in the year 2025 and make sure it is recycled plastic. C&A launched its recycled and durable "bags-for-life", and when customers have used them too much they can exchange them for new ones for free (Liu and Xie, 2022).

Marketing campaigns have also become more sustainable focused. Some examples are Levi's "buy better, wear longer" campaign, promoting quality clothing that lasts generations, Lacoste "save our species" ad, which switched the crocodile logo with endangered species, or Everlane and its "warming jackets", advertising puffer jackets made from recycled plastic bottles (Schreyer, 2021).

Still, there are many aspects of sustainability which are missing. Reality is that there have been changes and improvements towards sustainability, but there is still a lot more to be

done (Kaner, 2021). Brands such as H&M, ASOS, Inditex and Superdry aim to reduce plastic pollution by removing plastic hangers or plastic bags in the packaging (Fashion Revolution, 2022). However, this does very little to address their yearly emissions of million metric tons of plastic fibres. Most fast fashion industry efforts seem to be greenwashing strategies made to cover the real pollution problem of the industry (Robinson, 2022). Can fast fashion be cheap and sustainable? When can a fast fashion brand be considered as sustainable? The major concern is that even though brands have started to be more transparent, a first important step to be sustainable, there are still some aspects in which there is a huge lack of information. Retailers simply do not address certain topics; they do not disclose certain information which would otherwise contradict their sustainable commitments. The two main topics that lack clear data and which commitments tend not to be verified by third parties are forced labor and labor rights, and environmental pollution (Bottini, 2021).

3.1 Forced labor and labor rights

Since the beginning, fast fashion retailers have been producing their clothes in countries where human labor is cheap and human rights are not taken into consideration. It is estimated that from the 75 million factory workers worldwide, only 2% have a decent wage which allows them to live. Most of them work around 16 hours a day the 7 days of the week (Ross, 2021). As a result, they are exploited. Companies tend to illegally subcontract the demands of large retailers, which creates forced and involuntary unpaid overtime (Legesse, 2020).

Over the years, there have been many scandals in the fast fashion industry which have shown the poor conditions of garment workers. For example, in 2016, Syrian child refugees were found working in the production of clothes for brands like Marks & Spencer, Zara, Mango, Next or Asos, hugely below the Turkish minimum wage per hour. Due to the controversy, each retailer acted differently, while Marks & Spencer offered them permanent contracts, Asos offered financial compensation and Zara committed to improve the factory working conditions (Hitchings-Hales, 2016). Child labor is common in the fast fashion industry in all stages of the supply chain. For instance, children tend to do the task of cotton picking because their little fingers do not damage the crops. It is very difficult to address child labor practices because it is mostly done through subcontracting, and companies do not really know where the textiles used in the garments come from.

Brands which prohibit child exploitation in their code of labor must make sure that it is not happening in their supply chain and even though it is complex, they must find ways to control subcontracting practices (Moulds, n.d.).

The tragic Rana Plaza catastrophe in 2013 was mentioned by media all around the world and showed the unsafe working conditions that killed and injured thousands of workers in Bangladesh (BBC News, 2013). Another example of a factory disaster is the Tazreen factory fire, which also occurred in Bangladesh in the year 2012 and killed 114 workers. The factory supplied clothes for retailers such as Walmart and C&A (BBC News, 2012).

According to the FTI, most major retailers do not disclose the total number of workers in their supply chains which pay recruitment fees. Even after being dismissed, workers in undeveloped and developing nations are expected to pay back recruitment fees. This means that they are indebted and in a poverty trap. With low wages and debts, workers are more vulnerable to forced labor, taking into account their difficulty to form trade unions and demand labor rights (Fashion Revolution, 2022).

Nowadays, almost every brand publicly supports equality and is against racism and discrimination. However, when digging deeper in the supply chains, most brands fail to address equality in the garment production. It is known that most garment workers in India are women from lower castes or oppressed ethnic communities, and it is common for women to suffer from sexual harassment and discrimination. In 2018, over 540 Asian workers alleged abusive incidents at GAP and H&M's supplier factories for not reaching the daily production targets (Hitchings-Hales, 2018).

However, we do not just have to go to underdeveloped countries to see the poor working conditions of employees in the fast fashion industry. During January 2023, there were strikes all over Spain from the Inditex salesforce asking for higher wages. These strikes have been taking place since the Black Friday, when employees from A Coruña agreed for higher salary percentage increases over the next 3 years. Workers claim that salaries have not been increasing for years, while the retailer has been having huge financial gains every quarter (Galindo, 2022).

As a local example, in Navarra, the 18 employees from the H&M's store in La Morea shopping mall have been on a strike since December 9, 2022, asking for an improvement in their labor conditions, and revealing that their salaries have not increased since the year 2009 (Diario de Navarra, 2023).

It is important to take into consideration that only in 2022 (February 1st – July 31st), Inditex had net benefits of 1,794 million euros (ABC, 2022), while H&M generated net benefits of 318 million euros during the fiscal year of 2022 (November 1st, 2021 – December 31st, 2022). In the case of Inditex, this is a financial record, while in the case of H&M the retailer has been suffering losses due to the Ukrainian-Russian war and its decision to close stores in Russia, a strategic country for the company (Godoy, 2023). However, it can be seen that no matter the financial situation, both fast fashion retailers tend to undervalue employees' labor conditions by establishing job insecurity and discomfort among workers, both in developed and underdeveloped nations. While fashion brands are obtaining quarterly profits, most workers in their supply chains are not paid enough to live decently. There is a real wealth gap between the corporate structure and garment workers in the supply chain, which brings unfair practices in the fast fashion industry.

3.2 Environmental pollution

The fast fashion industry has a huge environmental impact all around the world. While this is a very important problem, most major fashion retailers fail to disclose their annual production volumes and the waste this overproduction generates. According to the Fashion Transparency Index, 85% of fashion brands do not provide this information (Fashion Revolution, 2022). What they do disclose, on the other hand, according to the Index, is their investments in circular solutions into innovative business models to be more committed to sustainability, but they hide the fact that they are still overproducing. Cotton production alone accounts for 16% of the world's pesticides (Rodale Institute, 2014). Lately, more fast fashion brands are claiming to be using more sustainable fibres for garments production but no proof of this is clearly given. Even if the fibres are natural, the intense chemical manufacturing process they go through, which involves toxic substances, make them not natural anymore, meaning that they end up polluting the environment (Fashion Revolution, 2022). This is an example of greenwashing. It is alarming to see that in 2021, an investigation carried out by the European Commission found that from 344 accusations of greenwashing, 42% were proven to be true, meaning that they were unfair commercial practices (European Commission, 2021).

The use of synthetic fibres (polyester, nylon, acrylic and others) is, therefore, a concerning topic in the fashion industry due to the energy intensive process it requires. Artificial

fibres not only reduce the quality of garments, but also make the industry more dependent on fossil fuels because they come from extremely processed petrochemicals. It is expected that in 2030 synthetic fibres will increase to 73%, being polyester 85% of them. Polyester is heavily used for the production of garments because its use is very cheap (Changing Markets, 2021). However, its carbon intensity is very intense: while the carbon intensity of a cotton shirt is 2.1 kg, it is 5.5 kg for a polyester shirt (UK Parliament Environmental Audit Committee, 2019). Due to the fact that synthetic fibres are made from non-biodegradable plastics, they end up decomposing in hundreds of years. The textile sector is the third largest user of plastic. The share of recycled polyester coming from recycled PET (polyethylene terephthalate) plastic bottles has considerably increased over the last years. Plastic bottles should be recycled back into plastic bottles, not into polyester. Using plastic waste to make garments does not solve the plastic problem, since microplastics are still released to oceans and most of these clothes will anyways end up in landfills (Van Elven, 2018). Microfibres are tiny fragments of synthetic fibres that are separated from clothes when they are washed, and thousands of tons of them are present in oceans, to the point that they are even found in the placentas from unborn babies (Changing Markets, 2021). So, while fast fashion brands have been promoting circularity in their supply chains, this is actually greenwashing because less than 1% of clothes are actually made from recycled textiles, being the rest recycled polyester from plastic bottles. If the trend continues like this, around 22 million tons of plastic microfibres will be in the oceans between the years 2015-2050 (Ellen MacArthur Foundation, 2017).

Currently, consumers are buying more clothes than ever but using them less, which means throwing them away more frequently than ever (Fortescue, 2019). Only last year, 25 tones of clothing waste were found in the depths of the sea of Ithaka, Greece (WPTV, 2022). However, most garment waste ends up burnt or in landfills such as the Atacama Desert in Chile, releasing microfibres, carbon, toxic chemicals and methane into the atmosphere, which are extraordinarily harmful for living beings (BBC News, 2022).

The huge release of greenhouse gas emissions (GHG) by the textile industry is extremely alarming. Only in 2015, the industry polluted 1.2 billion tons of CO₂, which is more than the sum of international flights and maritime shipping of that same year (Ellen MacArthur Foundation, 2017).

The fashion industry is the second largest industry most dependent on water, and textile dyeing is a considerable polluter of water (Maiti, 2022). Water in the rivers of India,

China, Bangladesh or Cambodia are full of harmful chemicals used when dyeing, bleaching or washing textiles. These chemicals can cause cancer and negatively affect biodiversity in these areas. Only in China, 70% of rivers and lakes are contaminated due to the unregulated practices of the textile industry (Webber, 2017).

3.3 Can fast fashion ever be considered as sustainable? The importance of consumer responsibility

Generally speaking, there is a lack of awareness, education and need to act coming from consumers towards the fast fashion industry. Even if it is known that workers from this industry have poor living conditions, consumers in the Western world still buy and consume fast fashion (Neumann et al., 2020). There are three several reasons that explain why behaviors do not change. First, some consumers may be truly ignorant about the supply chains and pollution effects of the fast fashion industry. Second, some may be aware of it, but prefer to ignore it because “the change of behavior of a single person will not make a big difference”. Third, an important part of consumers might prefer not to switch to ethical fashion simply because they cannot or do not want to afford it, and prefer to keep consuming cheap fast fashion garments (McNeill and Moore, 2015). It is known that eco-friendly fashion, more commonly known as slow fashion, is more costly because sustainable fabrics are more expensive, with a higher quality which implies higher production costs and the fact that it implies good working conditions, decent wages and clothes are handmade is translated into higher prices for the buyer (EDIS, n.d.).

An important issue in the fast fashion industry is its unsustainable demand (Binet et al., 2019). Consumers want the latest trends and are eager to spend more money on affordable garments, favoring the production of big quantities of clothes at very low prices. The short life of the garments, social media and the peer pressure to follow the latest trends, affordable prices and low-cost productions has generated a culture of impulse buying consumer behavior, which consequently generates a lot of waste and considerably pollutes the environment (McNeill and Moore, 2015). Even though generations Y and Z are more concerned with environmental issues, fair trade, exploitation or animal welfare, their intentions do not match their actual behaviors. This generation is known for its big consumption, fashion interest and technological enthusiasm, and is the target market of the fast fashion industry due to its huge consumption of fast fashion (Hill and Lee, 2015).

Fast fashion is the accepted social norm for younger consumers (Lundblad and Davies, 2016).

During the last years, fast fashion retailers have been using greenwashing strategies to provide positive feedback about their environmental performance and commitments in order to improve their corporate image (Fashion Revolution, 2022). Moreover, the emergence of sustainable lines such as H&M's *Conscious Collection* or Zara's *Join Life* aim to target those fast fashion consumers which are interested in a more ethical consumption. Nevertheless, as previously explained, they decide not to address certain topics which would otherwise contradict their environmental and social commitments. The real key question here is the perception of consumers towards sustainability in the fast fashion industry, because often there is discrepancy between attitudes and actions (Neumann et al., 2020).

In recent years, more concerned consumers have been trying to find alternatives to fast fashion. There has been a switch in the vision of sustainability, since it is not only defined by materials or product conditions, but also sustainability is defined by the behavior and habits of consumers (Domingos et al., 2022). Sharing, renting garments and offering secondhand products through online platforms has also become a profitable business. This is especially relevant for Y, Z and Millennial Generations, that look for ethical fashion while at the same time keeping up being fashionable. For instance, Rent the Runway is an online community where members can rent everyday outfits or garments for special occasions, and reselling is also available. The company is committed to operate with net zero emissions by 2040, minimize waste as much as possible, ensure fair working conditions and promote diversity in fashion by increasing the representation of Latino and Black designers. According to members of the community themselves, 89% of them buy fewer clothes than they used to since they prefer the option of renting (Rent the Runway, 2023). Consumers are switching their consumption choices to secondhand fashion, which is becoming more popular, and is offered in online applications like Zalando, Vinted or Depop. Moreover, thrifting and vintage buying are also seen as trendy fashion attitudes nowadays. Technology makes it easier for consumers to shop secondhand. As a matter of fact, only in the United States, the secondhand market is expected to more than double in 2026, reaching a value of approximately 82 billion dollars (ThredUP, 2022).

Reducing the environmental and social impact of the fashion industry can be accomplished through the efforts of retailers, governments and consumers (Berg et al., 2020). Even though we are witnessing a change in the mindset of customers, with more buyers purchasing secondhand fashion, considering other alternatives such as renting garments and overall becoming more aware of the need to switch to a more ethical way of consuming fashion, overconsumption in the industry continues. Especially since Covid-19 and the boom of social network TikTok, there is a significant amount of consumers who are switching to a fashion model that is even more harmful than the fast fashion one; the ultra-fast fashion model, as previously described (Bottini, 2021). In particular, the case of SHEIN is analyzed in the next section of the final degree project.

4. THE CASE OF SHEIN

The aim of this part of the final degree project is to analyze the company SHEIN. I have decided to choose this online fast fashion retailer due to its actual impact on the fashion industry. By using the latest technology, SHEIN is able to quickly identify and produce fashion trends so that thousands of new items are included to its website on an everyday basis at very affordable prices (Langer, 2021). The quick availability of new garments and cheap prices has attracted a broad audience. However, there are many concerns regarding the social and environmental impact of its business model, more specifically with its labor practices, as many independent investigations have shown (Public Eye, 2021).

I find it interesting to study how SHEIN has attained such immense popularity and success given the recent boom in sustainable fashion. One potential explanation which has already been mentioned is the inconsistency between consumers' attitudes and actions towards sustainability (Neumann et al., 2020). My objective in this section is to raise awareness among consumers about the significance of reducing overconsumption and to encourage them to make more informed and conscious decisions about their fashion choices.

In order to do so, I contrast the information given on SHEIN's website about CSR and sustainability, with independent research papers and reports which show the real practices of the brand. By providing the information from these different sources, I aim to reveal the discrepancies between SHEIN's claims and their actual practices. Therefore, the

chosen sources of information are SHEIN's website, research papers, academic journals, newspaper reports and investigations by non-governmental organizations (NGOs) or associations.

4.1 Company history, mission and vision

SHEIN, originally named as ZZKO in 2008, is a Chinese e-retailer funded by Chris Xu whose main goal is to make fashion accessible to everyone. It was renamed as SheInside in 2012 and finally became SHEIN in 2015. With headquarters in Guangzhou, today it employs approximately 10,000 people all over the world and sells to more than 150 countries (SHEIN, n.d.).

In 2022, SHEIN was the most downloaded shopping app, overtaking Amazon (Koetsier, 2023), and in April of this same year it was valued at \$100 billion, as worth as Zara and H&M combined (Williams, 2022).

It operates entirely digitally ("digital-first" model), and this was a major advantage for the company during Covid pandemic, being this the major difference with other key fast fashion retailers like Zara or H&M. During lockdown, customers spent a lot of time browsing and shopping, leading to a considerable rise of the company. SHEIN has a very powerful social media strategy, especially on Tik Tok, where unboxing hauls go viral. SHEIN offers a wide range of styles and trends at very affordable prices, and its mission statement is *to serve as a leader in the industry and bring fashion into the modern era*. The company's vision statement could be summarized as *making the beauty of fashion accessible to all* (SHEIN, n.d.).

4.2 Business model and success

SHEIN's astonishing success, especially since 2020 on, is explained by its fully digital agile supply chain, which is key in its business model. Running a completely digital e-commerce is less costly than doing so in a physical store, and producing in China is also a cheaper option (Li, 2021).

SHEIN relies on an Artificial Intelligence (AI) software which finds out fashion trends and is able to predict customers' demands. By using the most advanced technology, whenever there is a new trend, the supply chain automatically reacts in real time. As a result, the retailer can develop and deliver a collection in just three days, while Zara takes

three weeks. On average, 2,000 new items are added to the website every day, making customers eager to check the newest arrivals and creating addiction among them (Langer, 2021). SHEIN also works with an on-demand business model which allows the company to avoid overproduction, avoid customers waiting a long time for their purchases and limit excess inventory. The company relies on a third-party supplier community (SHEIN, n.d.).

Besides, SHEIN offers its garments at very low prices. This is especially attractive to younger generations, especially Gen Z. Through its website, SHEIN is continuously offering discount codes and a points collection system where 100 points equal 1 dollar. Buyers can acquire points from just entering and checking the app, buying clothes, leaving reviews or participating in live videos. This is an excellent strategy to keep consumers engaged and provide a unique customer experience. An important aspect of SHEIN's strategy is to offer similar popular garments as those offered by other fast fashion retailers but doing so at a cheaper price. For example, if a viral dress costs \$49.90 in Zara, a similar option is priced at \$13 in SHEIN (Williams, 2022).

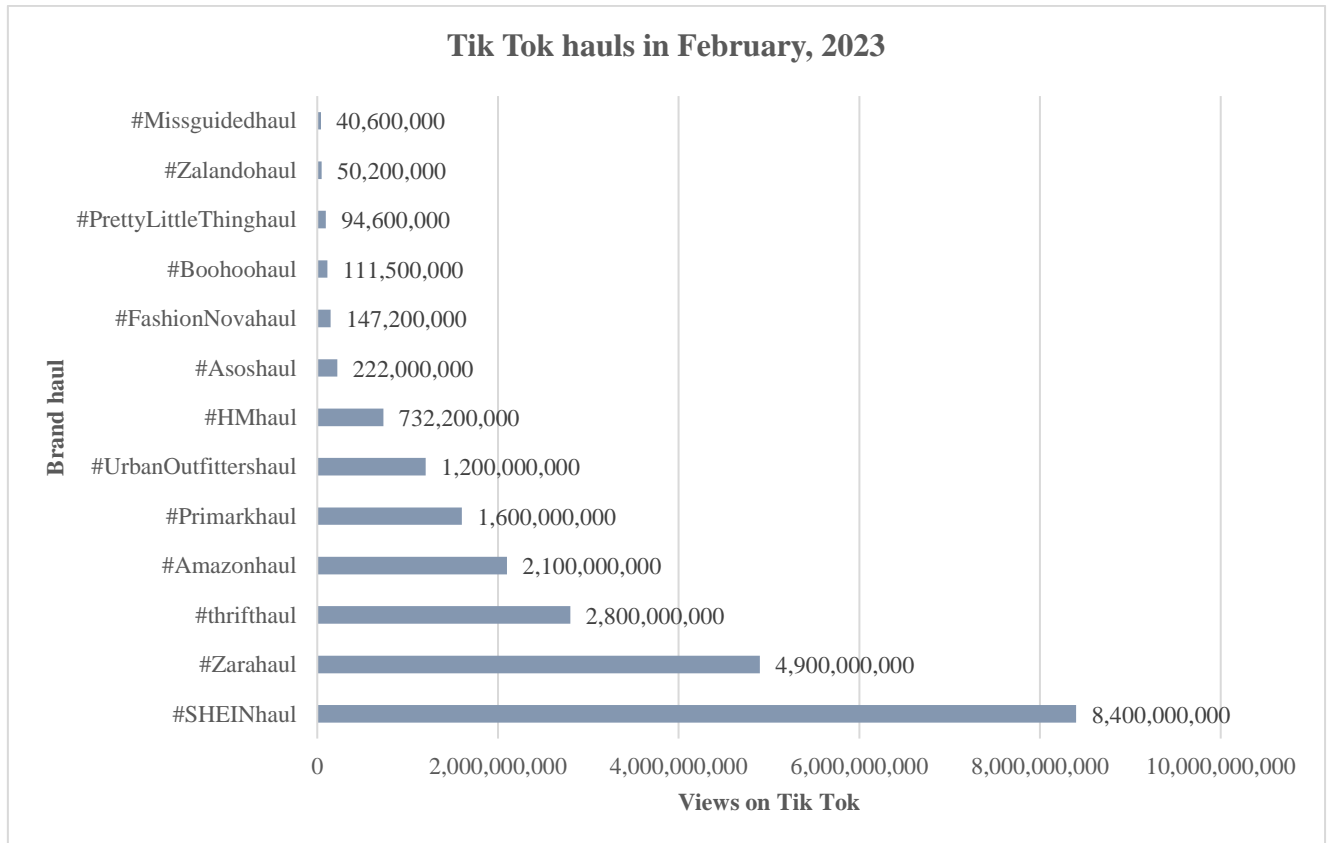
The company invested over \$55 million on the SHEIN X Incubator program, which collaborates with around 3,000 designers, and 1,000 more designers are expected to be hired during 2023. Designs are then sold and designers receive commissions (Feitelberg, 2023).

Another factor which explains why SHEIN is successful is its assortment of plus size garments. SHEIN has the line CURVE + PLUS. There are many positive testimonies of plus size women who choose to buy on the platform because they can see how clothes fit on bodies similar to theirs (Moreno, 2022). In SHEIN, there is a wide repertoire of sizes, so everybody, no matter their physical appearance, can shop and find suitable clothes.

Another key reason for the company's success is social media and marketing campaigns. Tik Tok is also an explanation for this triumph. On February 21, 2023, #SHEIN had 50.5 billion views on Tik Tok. The trend #SHEINHaul is also very popular, where shoppers (mostly influencers) show the audience the items they recently purchased, try them on and followers interact with each other, and there are currently 8.4 billion views (as consulted on Tik Tok by the author of this work on February 21, 2023). It is important to remark that Tik Tok is also a Chinese based company whose main audience is Generation Z, same as SHEIN (Bottini, 2021). Popular influencers and content creators promote SHEIN on their social media accounts. These influencers can receive a 10-20% commission per sale. When customers click on the promoted posts and purchase, the

affiliated influencer receives the commission. This demonstrates a great marketing capability (Daxue Consulting, 2022). Figure 2 shows SHEIN’s popularity in Tik Tok according to the number of views of #SHEINHaul compared to the views of competitors hauls as of February 21, 2023. #SHEINHaul is the highest in popularity, with 8.4 B views.

Figure 2. Number of views of fast fashion brands hauls on Tik Tok (February 21, 2023)



Source: Author (data taken from Tik Tok)

In conclusion, the large quantities of trendy clothes offered, lower prices than other fast fashion retailers, a key social media strategy (especially in Tik Tok, as an example #SHEINHaul) and the ability to continuously keep customers engaged are the essential components that explain SHEIN’s successful business model.

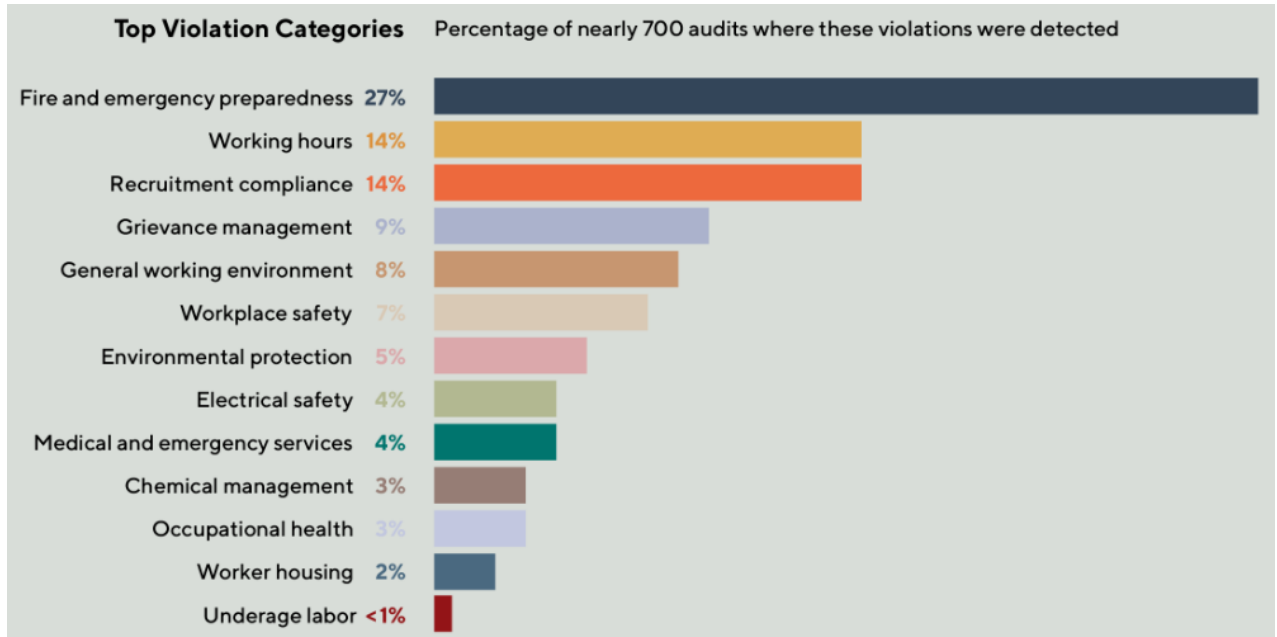
4.3 Corporate Social Responsibility

There is an abundance of definitions of Corporate Social Responsibility (CSR) (Van Marrewijk, 2003). According to the World Business Council for Sustainable Development (WBCSD), CSR is "the continuing commitment by business to behave ethically and contribute to economic development while improving the quality of life of the workforce and their families as well as of the local community and society at large"

(World Business Council for Sustainable Development, 1999). Another definition provided by the Commission of the European Communities states that CSR is “a concept whereby companies integrate social and environmental concerns in their business operations and in their interaction with their stakeholders on a voluntary basis” (Commission of the European Communities, 2001).

Like most fast fashion and ultra-fast fashion retailers, SHEIN also addresses CSR values, which can be found on its website. SHEIN claims to support the ten United Nations Sustainable Development Goals (SDGs) which put the emphasis on labor rights, human rights, environment and anti-corruption. The company supports the community by giving donations and financial aid through the program SHEIN Cares, which is dedicated to help entrepreneurs and the community while protecting the environment. SHEIN also donates to several nonprofit organizations such as Together We Rise, Girls Who Code, and Stand Up To Cancer, among many others. Besides, the SHEIN Spotlight program covers health and education costs of thousands of employees working for 120 SHEIN suppliers. The company fully commits to take care of its suppliers and the principles of its Code of Conduct fully respects the health, safety, environmental, labor and social conditions. SHEIN conducts regular supplier audits to make sure that factories do not violate health and safety requirements, exploit workers or seriously pollute the environment, and in case they find that suppliers do not comply with the Code of Conduct, it automatically terminates the contract. Figure 3 shows the most frequent violations found in the 700 audits which took place in 2021, according to the company.

Figure 3. Frequent violations detected in the 700 supplier audits which took place in 2021



Source: SHEIN (2021)

SHEIN also commits to protect the environment by lowering emissions and reducing waste throughout all the stages of its value chain. It relies on digital printing and digital transfer technologies to lower water usage and claims to use sustainable raw materials and work with recycled polyester. In order to reduce the waste accumulated in landfills, the company donates clothes to several organizations (SHEIN, 2021).

The Corporate Governance section of SHEIN’s website shows the most important policies which guide the company (SHEIN, n.d.). We can find:

- *A Commitment to Protect Forests Through Our Paper, Packaging and Fabric Choices:* where the company actively commits to reduce greenhouse emissions.
- *An Animal Welfare Policy:* with principles aligning with the Animal Health Codes and the Farm Animal Welfare Committee (FAWC) of the World Organization for Animal Health.
- *The Human Rights Policy:* where SHEIN commits to operate ethically and responsibly, respecting labor rights, the protection of workers, the human rights of suppliers’ partners and overall commits to be more transparent.

- Through its *Diversity, Equity and Inclusion Statement*: the company expresses the importance of following the Code of Ethics and the Supplier Code of Conduct, while empowering and giving voice to its diverse customer base.
- The *Environmental and Impact Statement*: motivates Supplier Partners to be involved in the reduction of greenhouse gas emissions, water waste and material usage while at the same time taking care of the air quality, protecting the environment and biodiversity.
- A *Workplace Health & Safety Statement*: which again emphasizes on the fact that Supplier Partners must respect human rights, provide adequate health and safety working conditions, and where SHEIN itself claims to provide health and wellness support.
- The already mentioned *Code of Ethics*: which explains the conflicts of interest, anti-bribery and anti-corruption standards, zero tolerance for sexual harassment and any time of discrimination, labor standards commitment and expresses the importance of confidential information.
- Finally, the *SHEIN Responsible Sourcing Policy*: where the company provides a deeper explanation of all the aforementioned policies.

4.4 Ethics, sustainability, transparency and controversy

After having a look at SHEIN's CSR, one could believe that it is a truly committed, sustainable and ethical company. However, as previously described in the section "Sustainability in the fast fashion industry", there is a general lack of information and data regarding the commitments described in the CSR values. Some key facts are simply not addressed, such as the tons of greenhouse emissions which have been lowered, the real working conditions of garment workers in supplying factories or the amount of chemicals used in the production of the clothes, as some examples. Despite the lack of relevant data, what we find in reality is a lot of independent investigations and (almost) weekly news about SHEIN's business and its social and environmental consequences. The truth is that it is extremely complicated to fully control garment workers conditions in the supplier factories and the exact amount of environmental pollution emitted to the planet (Fashion Revolution, 2022). Especially, taking into account the case of SHEIN, which releases around 2,000 new items every day and has extremely low prices (Langer, 2021), is it truly ethical and sustainable?

SHEIN's business model is the opposite of sustainable. It promotes a throwaway culture which generates a considerable high amount of waste. #SHEINHaul is one of the many examples, with influencers and content creators purchasing huge amounts of clothes and encouraging their followers to do the same using discount codes and promotions. The low quality of the garments and the constant generation of new trends implies that these items will be worn very few times and will end up in landfills (De Ferrer, 2022). The ultra-low prices and the comparison of prices of SHEIN and other fast fashion retailers like Zara also engage excessive consumption (Bottini, 2021). With SHEIN, shopping has become faster and cheaper, and generates an addiction to continuously buying new clothes. The company has been accused many times of stealing the ideas of independent designers and other brands, especially Zara. #Sheinstolemydesign already has 6.4 M views on Tik Tok (Britten, 2021).

The lack of transparency of the company is also notable. There are no third-party certifications to ensure the commitments, and the company has been many times on the news accused of violating labor laws. SHEIN used to state in its website that it was *proudly in compliance with strict fair labor standards set by international organizations like SA8000*. Social Accountability International (SAI), which created the standard, stated that *SHEIN was not certified and never had been to its knowledge*. The reference in the website was then removed (Jones, 2021). Actually, there have been several scandals linked to the infringement of workers' rights. A report by Public Eye in 2021 found that factory workers in Guangzhou were working 75 hours a week and only had one day off each month, violating local labor laws. Besides, several informal workshops were located in residential buildings with no windows and no emergency exit. The majority of garment workers are migrants from other Chinese regions, whose main goal is to earn money to send it to their relatives. SHEIN takes advantage of their precarious situation to exploit them and takes little responsibility (Public Eye, 2021). An investigation by UK broadcaster Channel 4 last year reported that workers from factories that supply clothes for SHEIN in Guangzhou were working 18 hours per day and were penalized with a reduction in their wage if they made any mistake (Singh-Kurtz, 2022). There have also been several speculations about child labor. During summer 2022, some Tik Tok videos went viral because buyers were showing that SHEIN clothing tags included handwritten messages such as "Help me" or "SOS". The company denied the allegations and claimed that it was a misunderstanding, and the truth is that there is no real evidence to support

this conspiracy theory (Perrett, 2022). A Bloomberg report last year proved that the cotton present in SHEIN garments was made in China's Xinjiang region. These linked SHEIN with the abuses and forced labor of Uyghur people. Senators from the United States asked SHEIN in February 2023 to be more transparent in its supply chain in Xinjiang. The Uyghur Forced Labor Prevention Act (UFLPA) prohibits imports of goods produced or manufactured in the Xinjiang Uyghur Autonomous Region of the People's Republic of China, following claims of forced labor in the region (Safaya, 2023). SHEIN already had to launch an investigation back in 2020 due to discriminatory job advertisements, which claimed that labor standards for ethnic minorities, including Uyghurs, did not apply. The company claimed that its name was used to release false information and apologized (Jones, 2021).

SHEIN has also had controversies regarding the presence of toxic chemicals. According to a report by Greenpeace Germany "Taking the Shine off SHEIN: A business model based on hazardous chemicals and environmental destruction" released in 2022, 47 products bought from SHEIN were tested in laboratories and results showed the concentration of dangerous and hazardous chemicals such as phthalates which are currently prohibited by the EU Regulatory Limits. The exposure of these chemicals not only threatens buyers, but also garment workers. SHEIN's response was that it was going to investigate the claim and remove the products which were tested (Kent, 2022).

Apparently, SHEIN seems to be concerned with ethical and sustainable issues, but evidence suggests the contrary. The company does not disclose relevant data regarding its suppliers and is not transparent, as it has already been proved. The company has a harmful business model which relies on constant production, throwaway culture and low prices, generating addiction and overconsumption, and this is not sustainable nor ethical.

5. LEGISLATION

As it has been proven throughout all this work, the fast fashion industry is not sustainable due to its environmental and social costs. Greenwashing definitely plays a role in the effort made by companies to seem more sustainable, but evidence from third party investigations shows many examples of unsustainable practices such as child labor or uncontrolled pollution. Many examples have been given in the previous sections of the final degree project.

It is a fact that fashion brands outsource manufacturing to underdeveloped countries with non-existent environmental legislation and violation of labor rights (De Araujo et al., 2020). In recent years, there has been an increasing involvement of governments due to the fashion industry's failure to effectively regulate itself, despite its professed intentions to do so (Shao, 2022). NGOs and other collectives have also taken the role of setting standards, although not achieving enforcement. This is because these standards are voluntary and not legally binding, therefore, the lack of repercussions prevents companies from acting (Southard, 2019).

The objective of this final part of the work includes showing the current legislation and present proposals from the European Union and the United States, that, if they became legally binding, would significantly affect production processes, labor practices, consumer behavior and the business models of fast fashion brands. Therefore, these proposals would force companies to change their current practices and would imply a change in the industry towards a sustainable approach. A special attention is given to the EU Strategy for Sustainable and Circular Textiles in the case of the European Union and to the FABRIC Act and the Uyghur Forced Labor Prevention Act in the case of the United States. Besides, the regulation of subcontracting is also addressed when explaining the legislative approaches.

5.1 Current legislation

The fashion industry has had little to no regulation throughout its history, mainly because of its complex supply chains that extend across numerous continents (Dobos and Éltető, 2023). However, the growing awareness of environmental damage and exploitative labor conditions has resulted in a growing demand for sustainability in the fashion industry, which has prompted international efforts towards a circular fashion economy (Papasolomou et al., 2023).

In 2015, the United Nations Sustainable Development Goals (SDGs) were adopted. The SDGs, along with the Green New Deal and the New Urban Agenda, provide a comprehensive set of guidelines and tools for governments and companies to address sustainability issues in the fashion industry. Policymakers can therefore offer financial incentives and create policies that promote transparency, accountability, and innovation as a way to encourage corporate sustainability practices (Pastran et al., 2021).

In Europe, the EU Strategy for Sustainable and Circular Textiles, adopted by the Commission on March 30, 2022, aims that by 2030 all textiles on the EU market will be long-lasting, recyclable and made of recycled fibres (European Commission, 2022).

The complexity of the supply chains in the fashion industry can be a challenge for companies to identify if child labor exists. Nevertheless, companies should be able to do so because they are the ones hiring their suppliers. Research showed that less than one third of companies monitored their direct or indirect suppliers (James, 2022). The recent importance of ethical fashion has resulted in several modern slavery legislations worldwide, as for example the Modern Slavery legislation in Australia (2018), the UK Modern Slavery Act (2015), the California Transparency in Supply Chains Act (2012) or the Business Supply Chain Transparency on Trafficking and Slavery Act (2020) (Lusty and Richards, 2022). However, none of these initiatives mandate companies to proactively eradicate forced or child labor from their supply chains. Instead, businesses are required to reveal the labor origins in the supply chains of their merchandise and disclose whether they are taking measures to eliminate forced or child labor. It should be noted that legal action can only be taken against companies for failing to reveal their dependence on child labor in their supply chains, and not for their use of child labor itself (James, 2022).

The Uyghur Forced Labor Prevention Act (UFLPA) was implemented in June 2022 in the United States, which prohibits the importation of any goods from the Xinjiang Uyghur Autonomous Region (XUAR). The UFLPA aims to prevent the entry of goods produced through forced labor into the US market. Companies must prove due diligence and provide assurance that their products are free from any components made under forced labor conditions. As a result, transparency and accountability are key in global supply chains, particularly with respect to preventing forced labor (U.S. Customs and Border Protection, 2023).

5.2 European Union

The European Commission wants to lead the transition of the textile industry towards a more sustainable, circular, resilient, and digital economy. As a result, the EU Strategy for Sustainable and Circular Textiles, developed in March 2022, aims to establish a sustainable and circular fashion industry ecosystem by the year 2030 (Centobelli et al., 2022). The Commission already adopted a new Circular Economy Action Plan in March

2020, which is a central component of the European Green Deal (European Commission, 2021). This plan outlines Europe's new agenda for sustainable growth, implementing new measures throughout the entire product life cycle, including textiles, to support the transition towards a more environmentally friendly future, while enhancing the competitiveness of businesses, protecting the environment, and promoting consumer and worker rights in production (Papasolomou et al., 2023).

According to the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, the EU Strategy for Sustainable and Circular Textiles is composed of five key elements. The Ecodesign for Sustainable Products Regulation (ESPR) will introduce mandatory requirements for textile products, which will enhance their durability, reusability, reparability, and fiber-to-fiber recyclability. These requirements will also mandate the use of recycled fibers, minimize the presence of hazardous substances, and reduce the negative environmental impact of textiles, all while keeping track of their performance (European Commission, 2022). The ESPR would impact any fashion multinational which exports to the European Union, so this would force fashion brands to transform their supply chains in developing countries so that they comply with the EU standards (Shao, 2022).

The Commission is planning to oblige large corporations to publicly disclose the quantities of discarded and destroyed products, including textiles, along with the methods used to prepare them for reuse, recycling, incineration, or landfilling. Besides, there will be a prohibition of the destruction of unsold garments. The Commission will also establish a Digital Product Passport for textiles, which will include compulsory information concerning circularity and other crucial environmental factors so that consumers can make better choices. The new EU rules will ensure that buyers receive a commercial guarantee of durability and information relevant to repair. In order to avoid greenwashing, the EU Ecolabel will determine if clothes can be labeled as "green" or "ecofriendly", also relying on third party verifications. The European Commission has also several initiatives to monitor the developments in textile waste generation (European Commission, 2022).

However, what is even more relevant about the EU Strategy for Sustainable and Circular Textiles is its will to find alternatives to fast fashion trends by the mandatory requirements of increasing the durability of textiles. The goals are also to change the mind of consumers

towards sustainable and circular business models such as take-back, second hand or repair services (Centobelli et al., 2022). The Commission also mentions that Member States should support the reuse and repair sector through taxation measures (European Commission, 2022).

The Better Work Programme is a collaboration between the United Nation's International Labour Organization (ILO) and the International Finance Corporation (IFC), and its aim is to enhance working conditions and promote the observance of labor rights for all employees in the garment industry, while also increasing the competitiveness of apparel companies by bringing together all levels of the sector (BetterWork, n.d.). The European Commission wants to simulate the Better Work Programme and supports third partner countries in improving working conditions and the compliance with international labor standards. Moreover, the Commission is in the process of developing a new legislative proposal, which will effectively forbid the sale of products produced using forced labor, including forced child labor, in the European Union (European Commission, 2022).

5.3 United States

In the United States, the Fashioning Accountability and Building Real Institutional Change Act, known as the FABRIC Act, is the first federal legislation which seeks to improve labor rights for garment workers while also promoting the re-establishment of the US garment production sector (Shao, 2022). The FABRIC Act aims to ensure that garment workers worldwide are safe (Beridze, 2022), and sets an hourly pay rate for workers while prohibiting "piece rates" (payment per item). The bill also includes a proposal to incentivize brands to relocate their garment manufacturing operations to the United States by offering a 30% reshoring tax credit scheme (Paton, 2022). A summary of the key objectives of the FABRIC Act is shown in Figure 4.

Figure 4. Objectives of the FABRIC Act



Source: The FABRIC Act (2022)

At the state level, California passed the Garment Worker Protection Act in 2021, which requires hourly wages for garment workers and estates that laborers would no longer receive payment based on the number of garments they produce (Shao, 2022).

With the Fashion Act, New York could become the first state in the US to impose accountability on fashion brands for their environmental and social effects. If passed, the proposed bill would mandate fashion brands to disclose a range of information about their supply chains, encompassing carbon emissions and labor standards. Those companies doing business in New York generating more than \$100 million in revenues would be obligated to map out a minimum of 50% of their supply chains and reveal the impacts of their operations, such as water footprint, chemical usage, and greenhouse gas emissions (Cernansky, 2022). The legislation would also mandate brands to mitigate their impact on the environment and improve any substandard practices based on legislative standards (Zwieglinska, 2023).

The Uyghur Forced Labor Prevention Act (UFLPA) came into force in the United States in June 2022, prohibiting the entrance of all goods from the Xinjiang Uyghur Autonomous Region (XUAR), also known as East Turkestan, as an effort to combat forced labor in Xinjiang and enhancing global cooperation to combat this flagrant infringement of human rights. XUAR provides 20% of the world's cotton. To avoid using materials produced under forced labor conditions, fashion brands must provide proof of conducting thorough due diligence and confirm that none of their products have been

made under forced labor (U.S. Department of State, 2022). In February 2023, US senators asked the chief executive officer of SHEIN to provide details about whether it procured cotton associated with forced labor. The letter cited a report published by Bloomberg in November 2022 in which a testing conducted in a laboratory confirmed that the clothes purchased from SHEIN on two separate occasions were manufactured using cotton sourced from Xinjiang. SHEIN responded that it requires its suppliers to purchase cotton from authorized regions and that it would conduct unexpected audits of supplier facilities (Business of Fashion, 2023).

6. CONCLUSIONS

The fast fashion industry has become a significant global phenomenon, rapidly expanding in recent years and achieving remarkable growth. Throughout this work, it has been explained how the industry has evolved to ultra-fast fashion, due to a change in consumption patterns especially notable in the Covid-19 pandemic. Buyers, especially young consumers, seek for immediate pleasure: they see a new fashion trend and they want it immediately in their wardrobe. The evolution of social media, especially Tik Tok, contributes to the culture of instant gratification which is translated into overconsumption patterns. Sections 1 and 2 describe fast fashion industry making a special emphasis on the emergence of ultra-fast fashion.

Recently, consumers seem to be more aware of environmental concerns and, consequently, fast fashion brands appear now to be "sustainable", "ethical", "committed" or "green", but they are not. Section 3 is completely devoted to analyzing sustainability in the industry. Garment manufacture considerably pollutes the environment making the fashion industry one of the most polluting industries. Water usage and water pollution, increasing amounts of waste and landfills, billions of tons of greenhouse gas emissions and use of harmful chemicals are only some examples of the detrimental environmental effects of fashion on the planet. Many fast fashion brands claim to be "sustainable" in their supply chain practices, but most of this is a greenwashing strategy, as it has been proved with several examples and investigations shown throughout the degree project. Moreover, besides environmental concerns, social and ethical issues are also very relevant in the analysis of sustainability in the fashion industry. Labor abuses and violation of garment workers rights are an actual problem. Wages in developing and underdeveloped countries do not ensure a decent living, and most workers are overexploited. The lack of job security

has produced many examples of factory fires over the years. Gender discrimination and racism are as well common, especially against ethnic minorities. Child labor is habitual in the fast fashion industry in all stages of the supply chain. Taking into account the environmental and social consequences of the fast fashion industry, under no circumstances it can ever be considered as sustainable.

In section 4 the company SHEIN is deeply explained and analyzed. Created in 2008, it was valued at \$100 billion in 2022, same as Zara and H&M combined. Gen Z is especially attracted to SHEIN due to its infinite availability of the latest trends and extremely low prices. On February 2023, #SHEIN had 50.5 billion views on Tik Tok, and #SHEINHauls are among the most popular trends in the social network. In its webpage, SHEIN addresses CSR values and states the protection of workers' rights, which, however, are not verified by third parties, and external investigations have shown many cases of labor abuse and exploitation. The company is not transparent and claims to be involved in practices which are not sustainable at all.

Finally, in Section 5, the legislation has been analyzed. The fact that the fashion industry has huge and complex supply chains in many countries of the world contributes to the difficulty of building efficient laws. However, in recent years there have been several improvements. Proposals such as the European Union Strategy for Sustainable and Circular Textiles and the FABRIC Act bill in the United States could make a significant change in the industry forcing companies to modify their supply chain practices and accelerate the transition towards sustainability. Existing legislation such as the Uyghur Forced Labor Prevention Act is already having an impact in the attempt to reduce labor slavery by prohibiting imports of cotton from the Xinjiang Uyghur Autonomous Region in China.

Customers have a key role. They can make an impact with their purchasing decisions. They are not paying the entire price of a garment because someone else is doing so by being exploited. The planet also pays the price for cheap fashion. We need to be conscious and raise awareness of what we are buying and what we are supporting. Fast fashion is popular because consumers allow it. We should reconsider our buying practices and start caring more about the planet, the unprivileged and the future.

Regarding the limitations of the work, it has to be said that it is based on secondary data. Even though there are many research papers about fast fashion, sometimes there are discrepancies. Figures can become obsolete quickly, so it is important to take this into

account when relying on papers published several years ago. Fashion brands themselves sometimes do not provide exact or complete data, which then makes it more complicated to contrast the information. Future research papers can address the impact of legislation on the fashion industry. Right now, most of the regulations explained throughout the degree project are proposals, meaning that they are not law yet, so they are not binding. It is uncertain now if they will become legally binding and if they will end up affecting the fast fashion business. This work has tried to provide readers with clear current facts and data regarding the fast fashion industry so they can become more conscious if they wish to do so.

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