



SPECIAL EDITION ETHICAL FASHION REPORT

WHAT'S CHANGED IN 10 YEARS?



WE ACKNOWLEDGE
THE TRADITIONAL
CUSTODIANS OF
THE LAND ON WHICH
WE ARE PRIVILEGED
TO WORK AND LIVE.
WE GIVE THANKS
TO OUR CREATOR
GOD FOR THEIR
STEWARDSHIP, AND
WE PAY OUR RESPECT
TO ELDERS PAST,
PRESENT AND FUTURE.

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The Ethical Fashion Report is a project of Baptist World Aid Australia.

Baptist World Aid Australia has been campaigning publicly to end worker exploitation for 10 years. To help us continue this work, click [here](#) to donate. We are learning and improving each year with our ethical fashion research. Your feedback is always greatly appreciated, and can be sent to hello@baptistworldaid.org.au

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Introduction

A LOT CAN CHANGE IN A DECADE. FOR BETTER, AND FOR WORSE.

Ten years ago, in the early hours of April 24, 2013, a garment factory in Dhaka, Bangladesh, crumbled. Within its walls were thousands of workers, many of whom never returned home to their families that night.

Over 1,130 workers perished in the collapse, with thousands more critically injured.

As labels of well-loved brands surfaced amongst the dust and rubble, consumers and brands around the world awoke to the daily reality facing the people who make our clothes. This tragic incident catalysed a new wave in the ethical fashion movement.

Fast forward a few months, and Baptist World Aid released its very first edition of the Ethical Fashion Report.¹ During this critical time, the report placed a spotlight on what Australian fashion companies were (or weren't) doing to protect and empower their supply chain workers. And findings were pretty grim.

A decade on, the report's findings are as pertinent as ever. The Rana Plaza collapse was one of the deadliest industrial accidents in recent history,

but it wasn't the last. Scores of factory fires and building accidents have occurred since, affecting the lives of thousands. Beyond safety incidences, exploitation in the fashion industry is woven deeply into the system as workers face abuse, harassment, discrimination, unliveable wages, and polluted environments. Scattered throughout this report, you'll find excerpts from stories of real-life garment workers who face these issues daily. Workers like Alaya, Nargis, and Layla² are the reason the Ethical Fashion Report exists.

Through ten years of advocacy, action, raising awareness, and holding companies to account, Baptist World Aid—alongside countless other organisations, advocates, and individuals—has pushed fashion closer towards an industry that respects its workers and the planet. But we're not done yet.

This report reflects on what's changed in the ten years since Rana Plaza and the first Ethical Fashion Report. What is most shocking isn't what has changed, but what hasn't. This report shows that despite the remarkable advancements in areas like tracing, transparency and policies, outcomes for workers have failed to progress.



Paper policies will no longer cut it. In many countries around the globe, the people who make our clothes are still living in poverty despite working twelve-hour days, six days per week. Many fail to have their voices truly heard by fashion companies and lack the ability to raise concerns without fear of retribution, as freedom of association, union presence, and collective bargaining agreements are still scarce. Despite abundant chatter from companies, handsome sustainability reports, impressively worded ethical sourcing pages, and formidable graphs—all amongst growing profits and production rates—the reality for garment

workers and the environment tells a vastly different story. The pandemic proved fast change is possible when backed against a wall. Now, more than ever the fashion industry has its back against the wall.

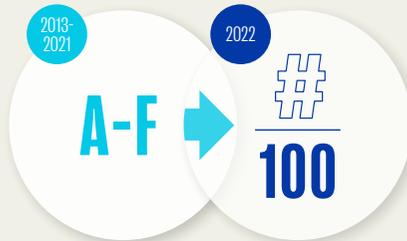
We celebrate the progress the fashion industry has made but call on them to act now to create genuine, systemic change over the coming decade. The Ethical Fashion Project isn't going anywhere until we reach a world where all garment workers are treated with respect and dignity, can afford to support their families, and live and work in healthy and safe environments. We won't stop until this is the reality.

¹ The 2013 report was titled the Australian Fashion Report. ² Names changed to protect privacy. Worker stories published in partnership with Tearfund New Zealand and ActionAid Australia.

A DECADE IN REVIEW

Our Biggest Report Changes

2022 NEW SCORING SYSTEM
= GREATER TRANSPARENCY ON BRAND PERFORMANCE THAN A-F GRADE



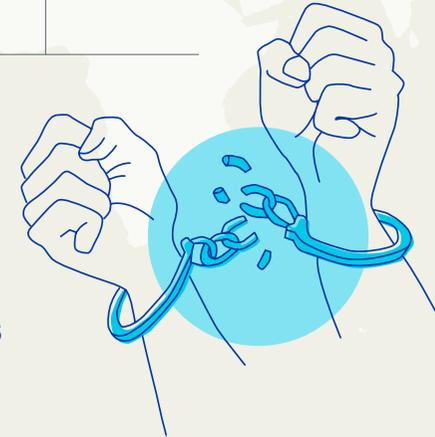
2019
Introduced Environmental Sustainability Survey Section
ENVIRONMENT + WORKERS



2013-2023

Global Fashion Context

UK, USA, AUS + OTHER COUNTRIES ENFORCED MODERN SLAVERY ACTS



INTERNATIONAL



Problem-solving tech
INCLUDING BLOCKCHAIN, ISOTOPE TRACING + INNOVATIVE FIBRES



Certification schemes =
INCREASED ACCESS TO RAW FIBRES, FABRICS AND PRODUCTS WITH STRONGER ENVIRONMENTAL & ETHICAL STANDARDS



100 billion³ +
'FAST FASHION' ITEMS CREATED GLOBALLY EACH YEAR



14.8KG
OR 56 ITEMS OF NEW CLOTHING PER AUSTRALIAN PER YEAR⁴

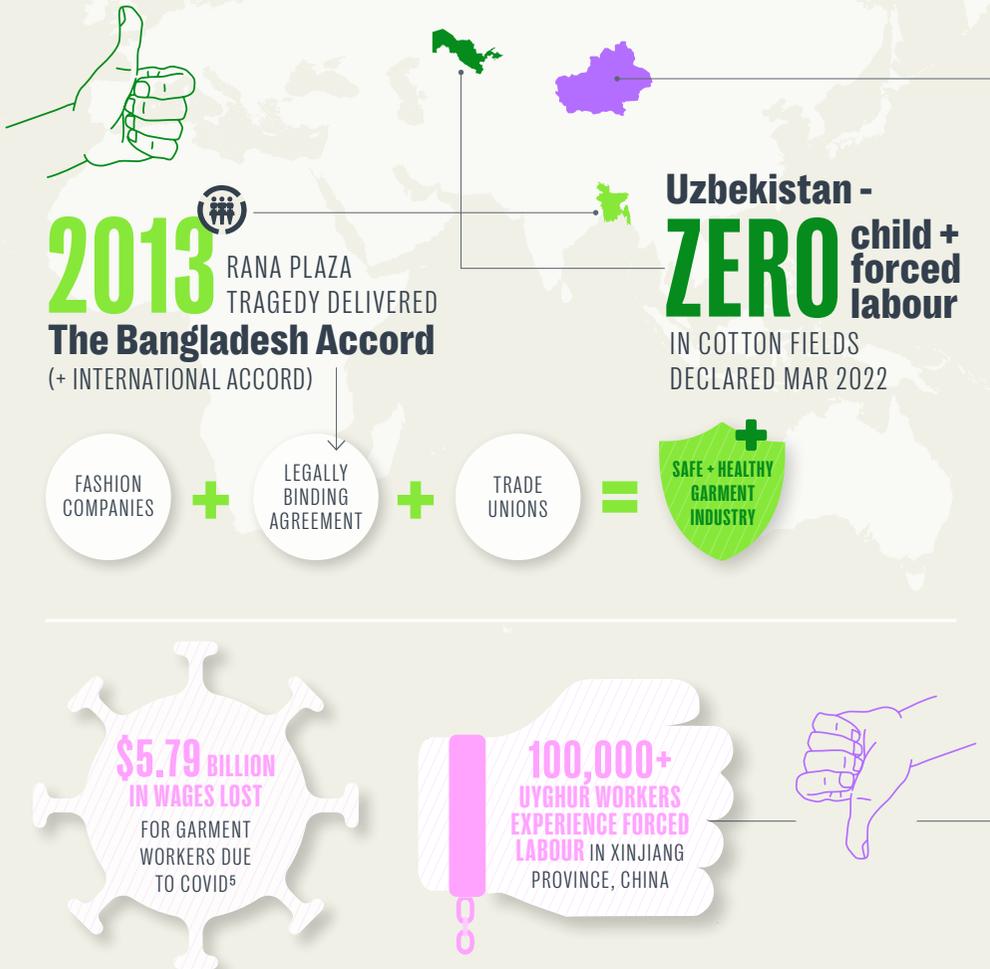
227,000
TONNES OF CLOTHING SENT TO LANDFILL PER YEAR⁴

+190,000
TONNES DONATED TO CHARITIES EACH YEAR⁴

³ Clean Clothes Campaign <https://cleanclothes.org/fashions-problems/waste-and-pollution>

⁴ Australian Fashion Council, Clothing Data Report 2022

Wins & Losses For Global Garment Workers



‘Because of the new regulations, the rules are a lot stricter. Factories cannot get away with as much. Garment workers can place a complaint now and many companies will take action.’

NARGIS, 40, BANGLADESH GARMENT WORKER

The Biggest Movers And Shakers

25 COMPANIES WERE ASSESSED IN BOTH YEARS, A DECADE APART

5 MOST IMPROVED

(COMPARED TO THEIR PEERS, 2022 SCORES OUT OF 100)

KMART	D	TOP 20%	(57)
LACOSTE	F	TOP 40%	(44)
DAVID JONES	F	TOP 40%	(42)
LULULEMON	C-	TOP 20%	(56)
VF CORP	C+	TOP 20%	(54)

5 LEAST IMPROVED

(COMPARED TO THEIR PEERS, 2022 SCORES OUT OF 100)

FOREVER 21	D-	BOTTOM 20%	(3)
ABERCROMBIE & FITCH	D+	BOTTOM 40%	(23)
SUSSAN GROUP	C-	MIDDLE 20%	(23)
MYER	D+	MIDDLE 20%	(24)
CUE CLOTHING CO.	B	MIDDLE 20%	(29)

2013 2022

2013 2022

⁵ Garment Worker Diaries. Two Months On: The Impact of COVID-19 on Workers. GWD. [Online] June 2020. [Cited: August 2020.] <https://workerdiaries.org/two-months-on-the-impact-of-covid-19-on-workers/>

Two Steps Forward, One Step Back: What's Changed And What Hasn't

Any step towards a more ethical supply chain is a good one, and over the last decade, the fashion industry has made several steps forward.

Our analysis found companies that were included in the Ethical Fashion Report in both 2013 and 2022 outperformed the full cohort of companies assessed in 2022 by an average of more than 11 points.⁶

ETHICAL FASHION REPORT AVERAGE COMPANY SCORES IN 2022 (OUT OF 100)

- AVERAGE FULL 2022 COHORT
- AVERAGE COMPANIES ASSESSED IN BOTH 2013 AND 2022



This group has made progress on the majority of comparable indicators assessed in this research compared to 2013, notably in policy development, supply chain tracing and transparency. This speaks to the value of consistent, long-term ethical sourcing efforts from companies, coupled with ongoing public accountability through advocacy efforts such as the Ethical Fashion Project.

This gradual industry progress contrasts starkly to the rapid increase in clothing production, steeply rising profits of fashion companies, and the lived experiences of garment workers whose lives are put at risk, simply by going to work. Despite the huge improvements across foundational company-led indicators, the measures which see practical, worker-focused outcomes have failed to progress significantly in ten years. Some of the worst offenders include living wages, freedom of association, and raw materials monitoring.

So, here's what's changed and what hasn't.



⁶ Comparison based on the 2022 scores of the full 2022 cohort versus the 2022 scores of the cohort of 25 companies also assessed in 2013.

Here's What's Changed: POLICY CREATION



One of the areas of largest improvement is policy creation. Robust policies reinforce—theoretically at least—the standards of behaviour that suppliers adhere to, setting a baseline for measuring the effectiveness of efforts to improve supply chain practice.

Amongst companies assessed in both 2013 and 2022, 84% now have a Code of Conduct aligned to international best practice standards on workers' rights such as the elimination of child labour, freedom of association, and the right to collective bargaining—an improvement from just 28% of these companies in 2013. But progress is slower when it comes to deeper tiers of the supply chain. Only 36% of these same companies applied their Code of Conduct beyond Final Stage suppliers in 2022, improving marginally from 24% in 2013.

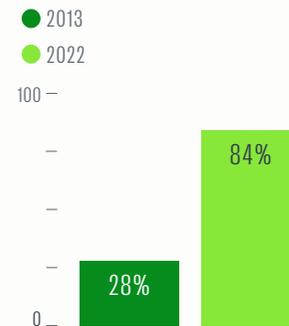
The second policy of note is Responsible Purchasing Practices (RPP), designed to support improved working conditions and enable the implementation of practices like fair price negotiations and sufficient order lead times. Of the 25 companies assessed in both 2013 and 2022, 40% had taken at least partial action towards developing an RPP policy in 2013. In 2022 the survey response requirements were strengthened, and 84% of the same cohort could evidence partially or fully developed policies and accompanying strategies for implementation. This contrasts with the full cohort of 2022 companies of whom only 59% have at least partially developed a policy and strategy to implement.



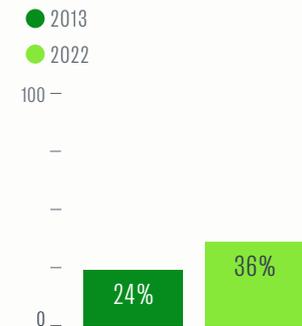
COMPANIES WITH A RESPONSIBLE PURCHASING PRACTICES POLICY AND STRATEGY FOR IMPLEMENTATION IN 2022

Full 2022 Cohort (120 COMPANIES)	30%	YES
	29%	PARTIAL
	41%	NO
Companies assessed in both 2013 and 2022 (25 COMPANIES)	56%	YES
	28%	PARTIAL
	16%	NO

COMPANIES WITH A CODE OF CONDUCT ALIGNED TO BEST PRACTICE STANDARDS (25 COMPANY COHORT ASSESSED IN 2013 AND AGAIN IN 2022)



COMPANIES WITH A CODE OF CONDUCT COMMUNICATED TO INPUTS AND/OR RAW MATERIALS (25 COMPANY COHORT ASSESSED IN 2013 AND AGAIN IN 2022)



BUT Here's What Hasn't Changed:

POLICIES IN PRACTICE – FREEDOM OF ASSOCIATION AND LIVING WAGES



It's promising to see companies establishing foundational policies and guidelines, but these alone don't make a material difference to workers in need of a collective voice, living wage, and job security.

FREEDOM OF ASSOCIATION

In the aftermath of Rana Plaza, it was revealed that the building's structural issues were known, but thousands of workers who attended the factory on the day of collapse were threatened with several weeks of pay loss if they failed to show up for work. Without a collective voice and with families reliant on this income, these workers were powerless to say no.

Freedom of association gives workers the ability to push back against power imbalances between themselves, their factory managers, and the fashion brands they're producing for. The right to join unions or worker representative groups is enshrined in most fashion companies' Codes of Conduct. In 2013, three quarters of all companies assessed had 'freedom of association' listed in their Code, and in 2022, this remained high. Yet when asked in 2013 whether Final Stage suppliers were either majority worker-owned co-ops or had

collective bargaining agreements in place, just 7% could evidence this with another 17% receiving a partial mark. In 2022, companies were asked a slight variation on this question: what percentage of facilities were known to have independent, democratically elected trade unions and/or collective bargaining agreements in place? Of the entire cohort assessed in 2022, just 5% of companies could evidence this for over three quarters of their suppliers, with another 42% providing evidence for up to three quarters of suppliers (with the majority falling in the lowest 1-25% bracket).

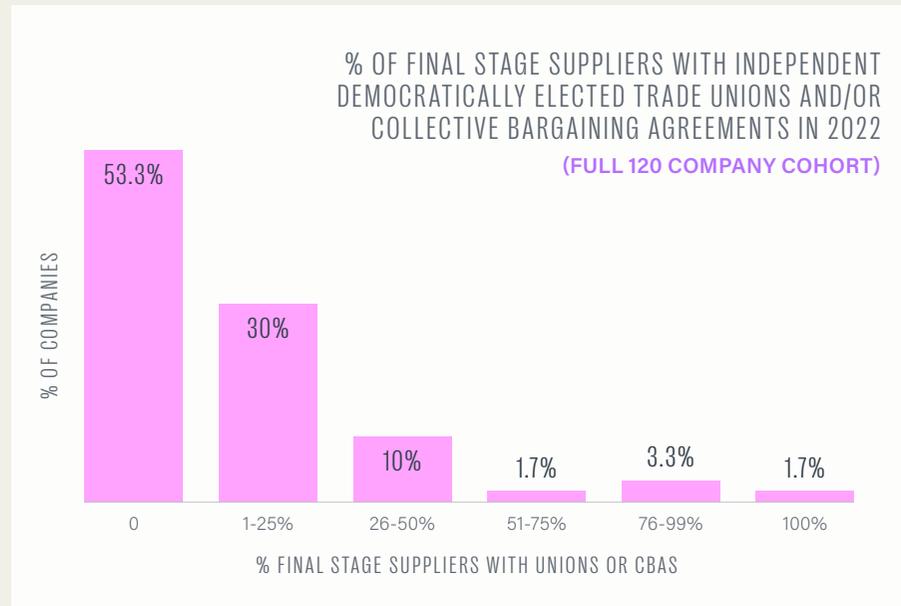
Herein lies the discrepancy between statements made in paper policies and actual worker outcomes. While most companies publicly state that they are supportive of freedom of association, few can genuinely provide evidence that this occurs in their supply chains. Companies must move beyond a 'sign and fine' approach, whereby factories are required to sign policies such as Codes of Conduct requiring rights to be upheld, with no further follow up. Instead, they must engage their suppliers in ongoing dialogue, targeted training, and enforcement of policies through tactics such as order incentives.



'I got a job, but I had to quit because they were suppressing workers' rights and exploiting workers. They gave me little pay, but I had to take it because I needed to buy formula for my baby.'

CHANNA, CAMBODIAN GARMENT WORKER

HERE'S WHAT HASN'T CHANGED



LIVING WAGES

Payment of living wages was called out in the 2013 Report as *'one of the most demonstrable and measurable differences a company can make to the welfare of their workers.'* Year after year, we've asked companies a variety of living wage-focused questions. But while the questions may have changed, what hasn't is the industry's progress on this issue.



HERE'S WHAT HASN'T CHANGED

Of the 25 companies assessed in both 2013 and 2022, only one company, Cue, could guarantee payment of living wages for their Final Stage garment workers in 2013. (Cue were manufacturing predominantly onshore and were certified through Ethical Clothing Australia, making them an industry outlier.) Ten years later only two companies from this same group, Cue and Patagonia, could evidence payment of living wages at more than a quarter (but less than half) of their Final Stage factories. None could evidence living wages at all final stage factories.

The story becomes even more grim when the entire 2022 company cohort comes under the microscope. Between 2013 and 2022, the number

of companies included in the Ethical Fashion Report almost tripled. But of the 120 companies assessed in 2022, only four could evidence payment of living wages at more than 25% of their factories (one being a small, Fairtrade brand), and only eight could evidence payment at less than 25% of their factories.

So, why are companies making such little progress on living wages? Put simply, it's a systemic issue and no single actor in the fashion system can change things on their own. Even if a company pays a supplier a premium for their goods, an increased salary for workers isn't guaranteed because each company is just one buyer

of potentially hundreds using the factory. What's clear is that companies benefit financially from producing clothing in countries with low wages. Moving forward, we need a strong collaborative approach from all actors across the system.

Companies are starting to elevate this issue. Amongst companies assessed in 2013 and 2022, 64% evidenced projects to improve wages at some Final Stage suppliers in 2022. Just over one third of companies had also published a commitment to long-term payment of living wages, but we're yet to see if these commitments will be little more than empty promises.

COMPANIES PAYING LIVING WAGES AT ALL FINAL STAGE FACTORIES

(OF THE 25 ASSESSED IN BOTH 2013 AND 2022)

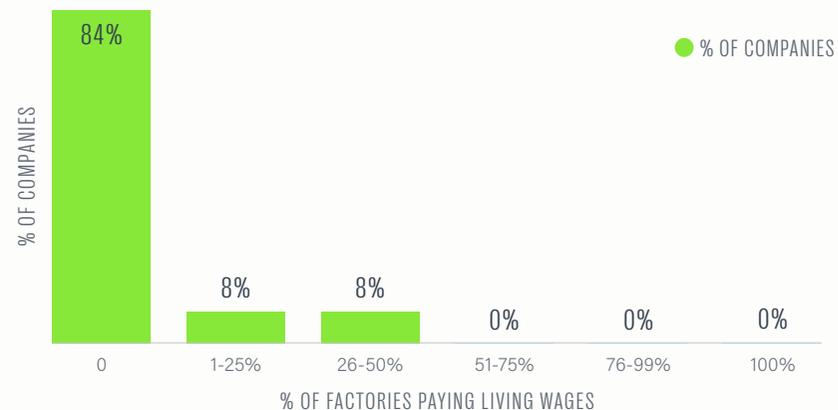
4%

2013
1 COMPANY

0

2022
0 COMPANIES

COMPANIES PAYING LIVING WAGES AT SOME FINAL STAGE FACTORIES IN 2022 (OF THE 25 ASSESSED IN BOTH 2013 AND 2022)



'I got another job at a different factory working in the sewing section where my salary was almost 1,600 taka (\$25 AUD) a month. My working hours were 8am to 8pm and sometimes 10pm. I worked long hours and then overtime and sometimes overnight. There was a lot of pressure to get things finished. It was possible to go to the toilet and have a drink of water, but we had to be very quick, otherwise the supervisors would shout at us.'

LAYLA (18), BANGLADESH
GARMENT WORKER

Here's What's Changed:

TRACING, TRANSPARENCY, AND FINAL STAGE MONITORING



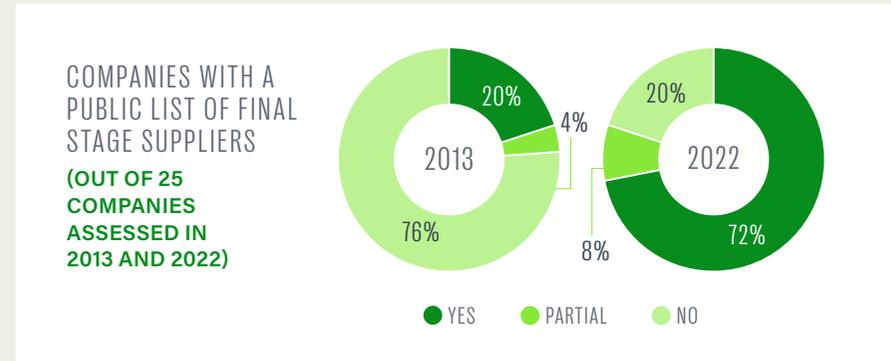
TRACING AND TRANSPARENCY

A company's ability to fully trace the source and supply of raw materials through to finished garments is not a simple process, but is essential to ensure appropriate human rights and environmental safeguards are in place. It's also the process which many other ethical supply chain practices depend on because without supply chain visibility, measures to prevent unethical practices cannot be implemented.

Amongst the 25 companies assessed in both 2013 and 2022, it's promising to see progress in tracing beyond Final Stage suppliers. Tracing of more than three quarters of Inputs suppliers (such as fabric mills) improved from 28% in

2013 to 52% in 2022. Twenty-eight per cent of companies had traced more than three quarters of Raw Materials suppliers⁷ in 2022, up from none in 2013. This demonstrates the efforts of companies assessed over the last decade to improve their supply chain tracing. Progress of the full cohort of companies in 2022 varied significantly, with 79% having traced at least some Inputs and 56.7% at least some Raw Materials suppliers. While there is still a long way to go, supplier consolidation, manual tracing and certifications have resulted in industry progress.

Once a supply chain has been traced, best practice companies progress towards full transparency. Publicly disclosing supplier names and addresses, and worker

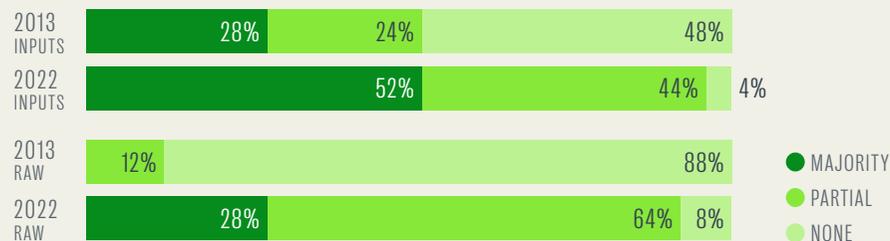


demographics such as gender and migrant populations, enables greater accountability. This is critical when abuse and exploitation are prevalent. Amongst companies assessed in 2013 and 2022, only 24% had published any form of supplier list in 2013, compared to 80% in 2022. This is a huge cultural shift for the industry, which pushed back sharply against transparency for decades citing 'trade secrets' and 'commercial confidence'. But beyond the public who can now access this data, the real win is for garment workers and whistle blowers who can identify and contact brands producing in factories where issues may be occurring.

FINAL STAGE MONITORING

Supplier monitoring usually involves an auditing process and questionnaire, and in some cases, gathering feedback directly from workers. While no monitoring process is perfect, high-quality monitoring gives fashion companies a better understanding of worker conditions. It enables them to address non-compliance, uncovers any risks or exploitative practices, and helps track the progress of projects intended to improve worker conditions.

% OF COMPANIES THAT HAVE TRACED INPUTS AND RAW MATERIALS SUPPLIERS⁸
(OUT OF 25 COMPANIES ASSESSED IN 2013 AND 2022)

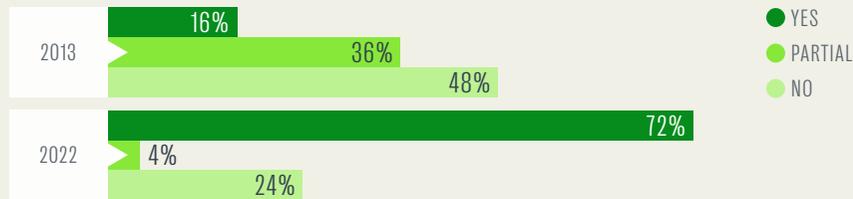


⁷ The 2022 statistic is based on companies who have traced 76% or more of their Inputs suppliers, whereas the 2013 statistic is based on companies who had traced 'all or almost all' of their Inputs suppliers. ⁸ 2022 figures have been converted to 2013 question format and are based on the following: 'Majority' is 76-100%, 'Partial' is 1-75%, 'None' is 0.

HERE'S WHAT HAS CHANGED

% OF COMPANIES THAT HAVE PUBLICLY SHARED SUPPLIER MONITORING RESULTS⁹

(OUT OF 25 COMPANIES ASSESSED IN 2013 AND 2022)



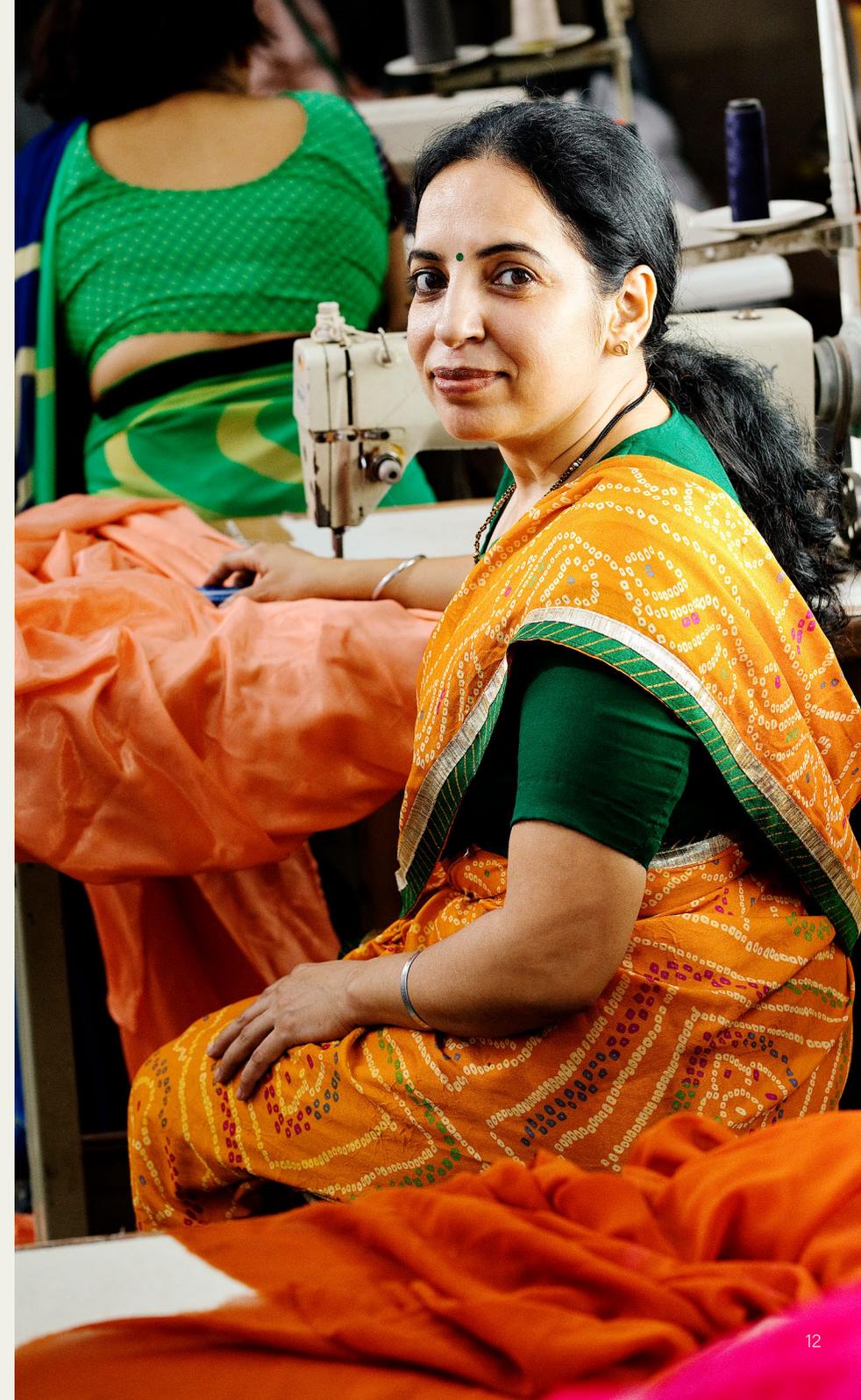
In 2013, 56% of the 25 companies assessed in 2013 and 2022 monitored the majority (at least 75%) of their Final Stage suppliers annually. In 2022, 84% of these companies could provide evidence of bi-annual monitoring. In a further nod to transparency, full or partial public reporting of supplier

monitoring has increased from 52% in 2013 to 76% in 2022. This not only enables greater accountability but also partly demonstrates the impact of Australia's 2019 Modern Slavery Act, which drove companies to increase public reporting of modern slavery risks and incidences.

'If I could talk to the foreign buyer, I would say 'please, please provide safety equipment and monitoring.'

RANA, TANNERY WORKER

⁹ In 2013 companies were asked "Does the brand share audit reports and corrective action plans publicly?" and in 2022 they were asked 'Does the company publicly report on the results of supplier monitoring and evaluation procedures'



BUT Here's What Hasn't Changed:

MODERN SLAVERY AND RAW MATERIALS SUPPLIER MONITORING



Despite progress in tracing and monitoring for Final Stage and Inputs suppliers, the Raw Materials tier continues to lag.

The agricultural industry is one of the highest risk industries in the world for modern slavery and child labour. The 2013 Ethical Fashion Report called out the cotton industry, shining a spotlight on Uzbekistan's state-enforced forced labour scheme which saw over a million children and adults forced into cotton fields at harvest each year. Uzbekistan was officially declared free of systemic child and forced labour in March 2022 which was a huge win for Uzbeks, and the global community at large.

Despite this win, modern slavery persists around the world, at greater levels than ever before. The 2022 Global Slavery Index¹⁰ shows the devastating reality that almost 50 million people around the world are living in modern slavery.¹¹ This is a **significant increase** from 2013, when an estimated 30 million people were affected. One of the most concerning regions is the Xinjiang province in China, which supplies roughly 20% of the world's cotton.

Most companies are still failing to trace and monitor where their raw materials are coming from, so they are unable to play their part in identifying,

addressing, and remediating exploitation when it occurs. Unfortunately, knowing where the majority of Raw Materials suppliers are based is still a novelty for companies. Amongst the 25 companies assessed in both 2013 and 2022, just 28% knew where the majority¹² of their raw materials came from in 2022, in contrast to zero in 2013. Amongst the entire cohort of 120 companies assessed in 2022, 43.3% of companies could not evidence knowledge of any Raw Materials suppliers, meaning little more than one in two companies have the ability to undertake monitoring, or implement initiatives to protect their workers and the environment.

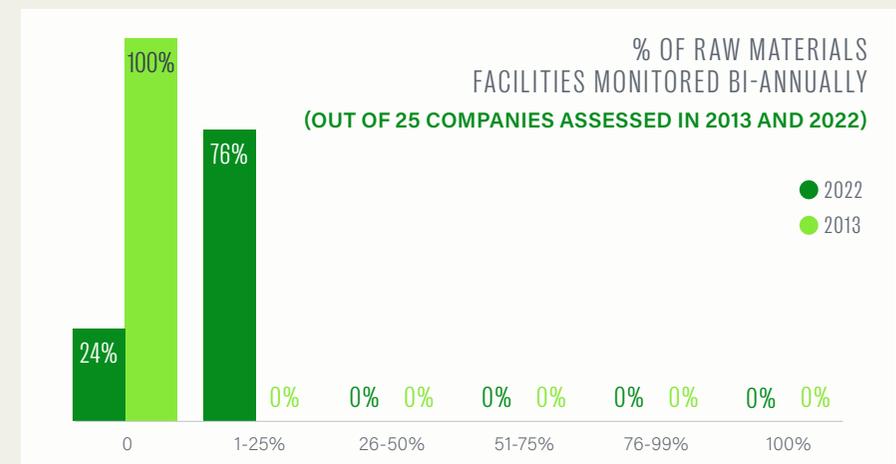
When it comes to monitoring of Raw Materials suppliers, progress is stagnant. Of the 25 companies assessed in 2013 and 2022, zero could evidence annual monitoring such as audits for at least three quarters of their suppliers in 2013. In 2022, this remains unchanged.¹³ However, there is monitoring occurring for lower percentages of Raw Materials suppliers. In 2022, 76% of these companies could evidence monitoring for up to one quarter of suppliers. In contrast, just 47% of the full 2022 cohort of 120 companies could evidence this same amount. This small

growth is testament to the increased use of raw material certifications in recent years, such as Better Cotton and Cotton Australia. But gaping holes

in tracing and monitoring require immediate and systemic action to protect some of the world's most vulnerable and exploited workers.

'Most of the factories I worked in had child labour. When the buyers or compliance officers visited the factory, they used to hide all the children on the roof or in some rooms. The supervisors would verbally abuse them and make them work overtime.'

ALEYA (35), BANGLADESH GARMENT WORKER



¹⁰ Walk Free, 2022. ¹¹ These statistics include forced labour and forced marriage. ¹² Majority defined as more than 75%. ¹³ In 2022, companies were assessed on bi-annual monitoring.

A Manifesto For A Better Fashion System

We are part of an ethical fashion movement: a global movement made up of organisations, certifiers, purpose-driven businesses, garment workers and global citizens, working together to disrupt the fashion system. Our movement has grown over the last decade, with more taking up the call to act.

Fashion companies have their backs against a wall and can no longer ignore the call. Following the global pandemic, burgeoning climate crisis, recent natural disasters and economic downturn, the future for garment workers has never felt less certain. But out of uncertainty is birthed an opportunity to rethink our current values and redesign our systems.

We are committed to the proposition that in a world driven by profits and power, justice and love matter above all. The ideas and hopes of those most significantly impacted by the fashion industry should be the voices most clearly heard—the workers and communities whose livelihoods and wellbeing rely upon a better tomorrow for them, their families, and generations to come. Our common humanity, our collective goodwill and desire for change are key to creating a long-term, sustainable change. This is our manifesto for a better fashion system.

Inspired by their voices and lived experiences, we see a world where workers:

- are not exploited for commercial gain but experience economic dignity through payment of living wages;
- who have been subjected to suffering and harm are heard, rehabilitated and compensated;
- feel safe in their workplace, and free to speak out or form collective action groups to protect their rights and co-create bold solutions.

We see a world where fashion companies:

- redefine success to put human rights and environmental justice over profits;
- take effective action that delivers on their policies and commitments, bringing about better conditions for workers throughout their supply chain;
- admit when 'solutions' are not working and mistakes have been made, seeking to innovate and improve their business practices;
- are transparent about their supply chain practices, with senior leaders rigorously involved in ethical sourcing decisions and accountable for their actions;
- use their collective power to create systemic change.

We see a world where the planet:

- is protected and restored from the damaging impact of over-production, the use of toxic materials and processes and textile waste;
- and the precious, finite resources it provides us with are taken sustainably, used with care, and reproduced in a regenerative way;
- is prioritised in all business decisions as we build a circular economy;
- is thriving and supports the health and wellbeing of all its inhabitants.

We see a world where global citizens:

- make informed clothing purchases, respecting the time, resources and skills that went into making them;
- seek to reduce the environmental impact of their clothes in-use, buy as sustainably as possible, and thoughtfully dispose of them through repurposing and recycling;
- advocate for fashion companies to escalate the pace of change, and for governments to hold them accountable;
- share what they know about ethical fashion with their networks, imploring them to join the movement.

We see a better world for all. Will you help us reach it?



'I'm not sure they've ever been conscious to ask where is the final destination of that thing they're discarding. But if they come here... and see the practicality for [themselves], then they will know that, no, we better take care of this thing within our country and not to ship the problem to other peoples.'

**SOLOMON NOI
DIRECTOR OF WASTE
MANAGEMENT
ACCRA METROPOLITAN
ASSEMBLY¹⁴**

¹⁴ ANC Foreign Correspondent <https://www.youtube.com/watch?v=bB3kuuBPVys>

Methodology

The *Special Edition Ethical Fashion Report: What's Changed In Ten Years?* is a comparison of existing data sets examining company progress since the publication of the first *Ethical Fashion Report* in 2013. The findings examined in this report are based on previously conducted research published in the 2013 *Australian Fashion Report* and the 2022 *Ethical Fashion Report*. Both reports were produced by Baptist World Aid Australia.

DATA COMPARISON

The research undertaken in 2013 and 2022 was conducted using a survey provided to companies. Although the survey largely covered the same themes and questions in 2022 as in 2013, it was not identical. Baptist World Aid reviews the survey questions annually to ensure the Ethical Fashion Report is aligned with best practice supply chain ethics and continues to raise the standard for fashion companies. This means the 2022 survey asked several questions which were not assessed in 2013, such as the inclusion of environmental sustainability practice. Other questions may be worded differently in 2022 for clarity but are inherently examining the same issue and require the same validation (or highly similar). All

data comparisons in this report reference questions which are either unchanged from 2013 or reworded but validated using the same criteria.

In some cases, data may be discussed thematically based on different questions assessed in 2013 and 2022. In these instances, the differences are noted for contextualisation. The full suite of survey questions assessed can be found here: [2013](#) and [2022](#).

COMPANY INCLUSION

The companies examined in this report have been grouped in two ways: full year company cohorts; and comparative company cohorts. Where it is indicated that 'full year company cohorts' are being discussed, this refers to the entire list of companies assessed in 2013 and/or 2022, respectively. This approach enables a comparison of the Australian fashion landscape at both points in time. In 2013, this was 41 companies representing 128 brands, and in 2022 this was 120 companies representing 581 brands.

'Comparative company cohort' refers to the list of 25 companies that were examined in the 2013 Australian Fashion Report and were again assessed under the same

COMPARATIVE COMPANY COHORT (2013-2022)	2013 GRADE	2022 SCORE	2022 RANK
Abercrombie & Fitch	D+*	23*	Bottom 40%
Adidas	B+	58	Top 20%
Big W	C*	34	Middle 20%
Cotton On Group	B-*	42	Top 40%
Cue Clothing Co.	B*	29	Middle 20%
David Jones	F*	42	Top 40%
Forever 21	D-*	3*	Bottom 20%
Fruit of the Loom	D	34	Middle 20%
Gap INC	B	46*	Top 40%
H&M	B+	56	Top 20%
Hanesbrands	A-	58	Top 20%
Inditex	A-	60	Top 20%
Just Group	D-*	27	Middle 20%
Kathmandu	B	55	Top 20%
Kmart	D*	56	Top 20%
Lacoste	F*	44	Top 40%
Levi Strauss and Co	B	39*	Top 40%
Lululemon Athletica	C-	56	Top 20%
Myer	D+*	24	Middle 20%
New Balance	B	52	Top 20%
Nike	B	50	Top 20%
Patagonia	B+	68	Top 20%
Puma	B	58	Top 20%
Sussan Group	C-	23	Middle 20%
VF Corp	C+*	54	Top 20%

* Depicts companies assessed on public information only.

entity name in 2022. Throughout the body of this report this has predominantly been referenced as 'the 25 companies assessed in both 2013 and 2022'. This cohort is listed in the table on the left.

Where 'companies' are referenced, this means parent companies. Most companies have multiple fashion 'brands' under their structure. In some cases, the brands assessed under a parent company in 2013 are not identical to those in 2022 due to corporate sales, mergers, and closures. The research conducted and data discussed in this report are reflective of the brands under each company at the date of publication of the 2013 and 2022 reports, respectively.

The full research methodologies, company lists, brand lists, and survey questions employed in each year are accessible via the following links: [2013](#); [2022](#).

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