

Monitoring report **Denim Deal**

Quantitative monitoring
brands and retailers
Baseline 2020

December 21, 2021



Introduction






On October 29, 2020, 28 parties signed the Dutch C-233 Green Deal on Circular Denim ('Denim Deal'). Signatories in the value chain, from collectors and recyclers to producers, brands, retailers and public authorities, have jointly developed an approach to take major steps towards using recycled textile in all denim products marketed in the Netherlands. On July 1st, 2021 in total 36 signatories were committed to the Denim Deal. This includes 8 new signatories.

The signatories of the Denim Deal aim to close the denim loop by promoting the use of high-grade post-consumer recycled cotton fibres ('PCR-cotton') in new jeans and other denim garments. They committed themselves to the joint ambition of working as quickly as possible towards a new industry standard at 5% PCR-cotton used in the production of all denim garments and will raise the bar in the future based on the learnings of the Denim Deal. They will publish transparent annual reports of the activities they have undertaken to this end, the results achieved, and their effect towards achieving the goals of the Denim Deal.

All data in this quantitative report apply to the 7 participating brands and retailers and not to the total market.

Goals Denim Deal

All signatories of the Denim Deal undertake activities to achieve the following specific goals before the end of the Denim Deal in December 2023.

1	Brands and retailers will achieve a minimum of 5% PCR content in their own denim collections during this period by working together closely with other signatories.	
2	Brands and retailers will achieve their own, individual and higher goals for PCR content in denim garments, and will set out their ambitions and approach in individual roadmaps, based on the close collaboration with other signatories.	
3	Brands and retailers will commit to individual ambitions designed to achieve the specific, joint goal of using 20% PCR cotton fibres in 3 million pairs of jeans produced by these parties until the end of 2023.	

This monitoring report provides the results of the quantitative baseline monitoring 2020 based on a monitoring form completed by all 7 brands and retailers in the Denim Deal to report on the Denim Deal goals and results.

Definitions

The monitoring considers the following definitions:

Denim is a cotton twill fabric, traditionally made from 100% cotton, but recently alternative fibres are added such as hemp, linen and elastane. The product must contain at least 80% cotton. Denim is traditionally blue by using indigo dye to colour the yarn in one direction. In practice, denim can have different colours and does not necessarily have to be indigo blue.

Denim garments are outer clothing made of denim (e.g. pants, dresses, skirts, jackets, shorts, shirts), except accessories (caps, bags, etc.), which for the purposes of the Denim Deal does not include trimming.

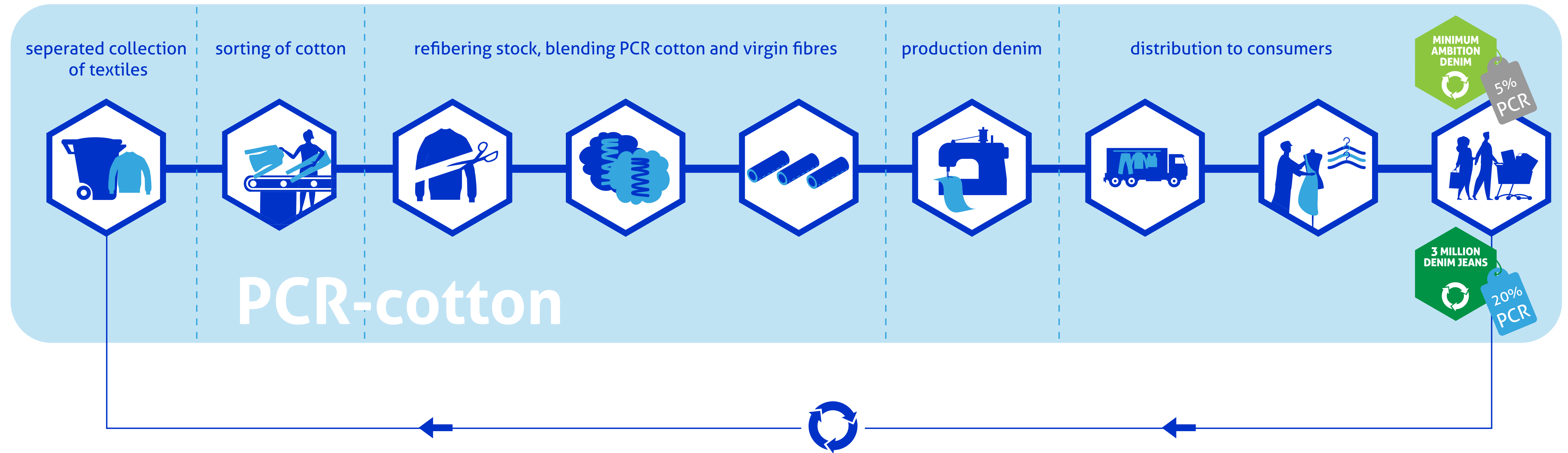
Jeans are hard-wearing trousers made of denim.

PCR-cotton is recycled cotton from textile products that have been used by the end user(s) for an indefinite period of time for the intended purpose and discarded and subsequently recycled, whereby the cotton fibres of at least 98% cotton are reused in new products.

The baseline data is compiled by FFact. Annual monitoring reports are planned each year up to 2024. The information in the report is anonymized and aggregated. This annual report was adopted in the Steering Committee of the Denim Deal.

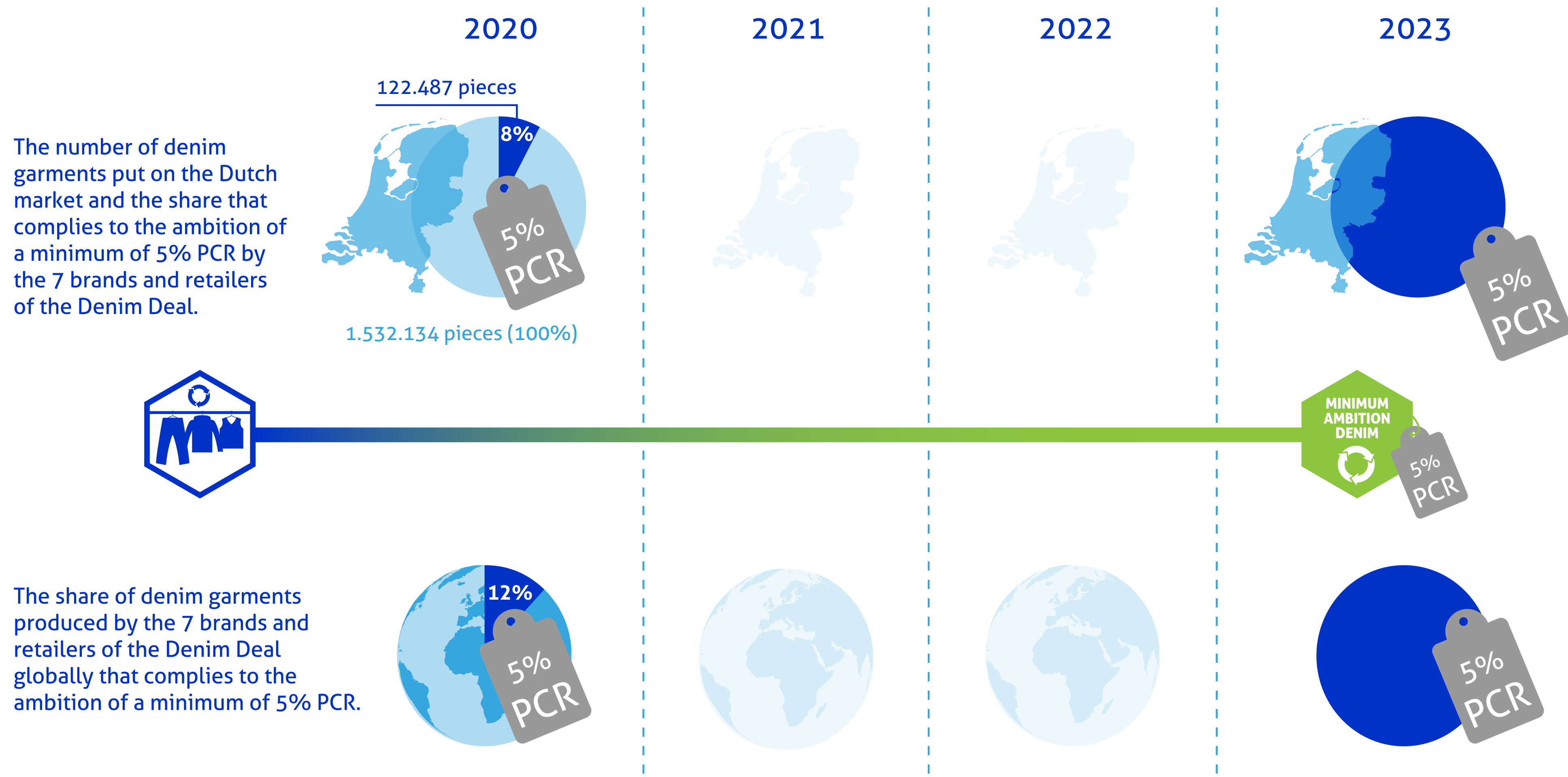
Road to goals denim garments and jeans

The figure below shows the supply chain of PCR cotton.



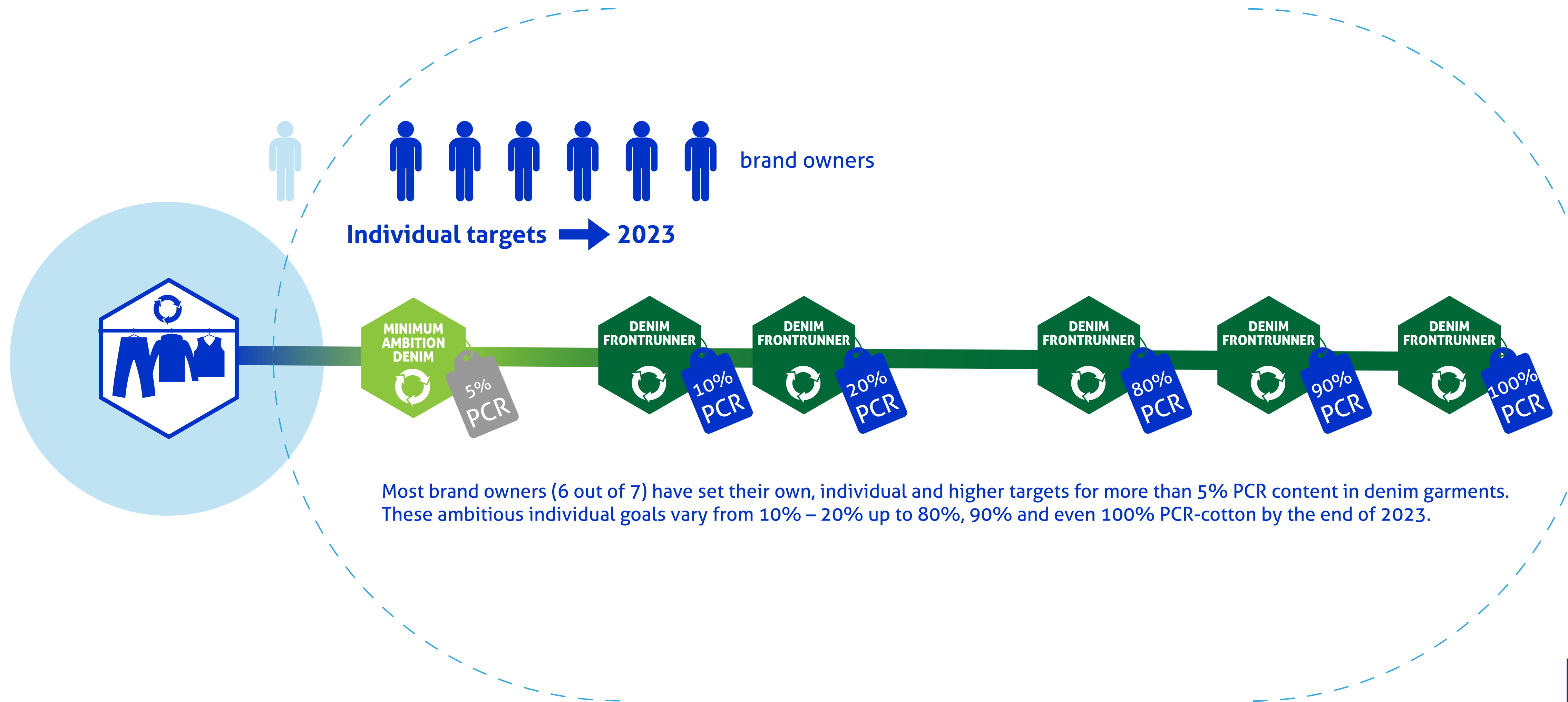
Results baseline monitoring 2020 denim garments

Following the results of the baseline monitoring of 2020 the numbers below refer to the questions in the baseline 2020 monitoring form. These are the figures of denim garments including jeans. The figures over 2021, 2022 and 2023 will be included in this figure in subsequent years.



Additional individual goals denim garments

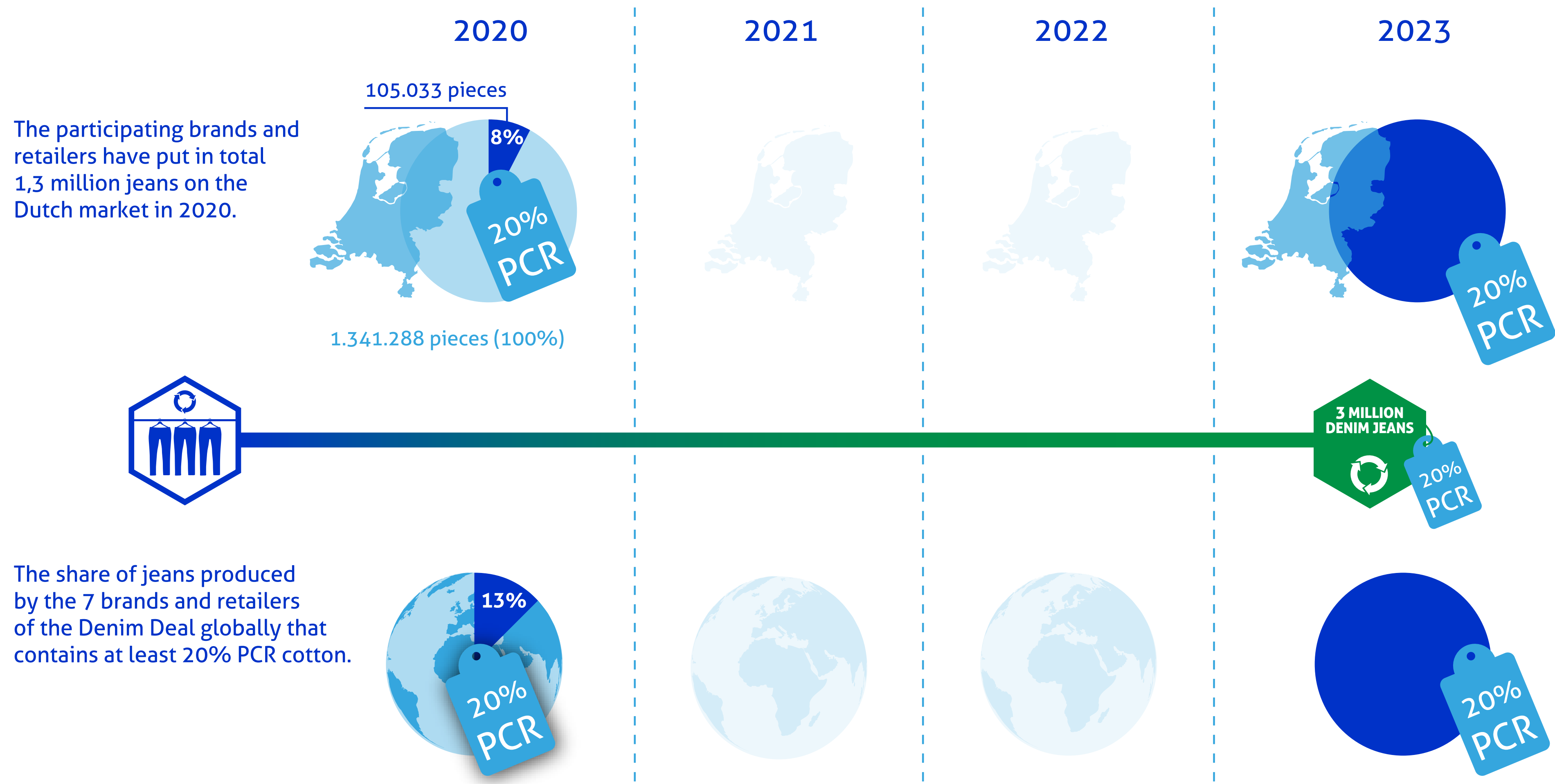
Brands and retailers have reported their own, individual targets for PCR content in denim garments including jeans.



Most brand owners (6 out of 7) have set their own, individual and higher targets for more than 5% PCR content in denim garments. These ambitious individual goals vary from 10% – 20% up to 80%, 90% and even 100% PCR-cotton by the end of 2023.

Results baseline monitoring 2020 jeans

Following the results of the baseline monitoring of 2020 the numbers below refer to the questions in the baseline 2020 monitoring form. The figures over 2021, 2022 and 2023 will be included in this figure in subsequent years.



Summary

Brands are willing to monitor

For 2021 seven brands and retailers participated in the 2020 baseline measurement of the Denim Deal. Potential new signatories will participate in the monitoring after joining.

Results denim garments

The results of the baseline measurement show for 2020 that from the volume put on the Dutch market by the 7 participants, 8% contains at least 5% PCR-cotton. And 12% of the volume of denim garments produced by the participants worldwide contains at least 5% PCR cotton.

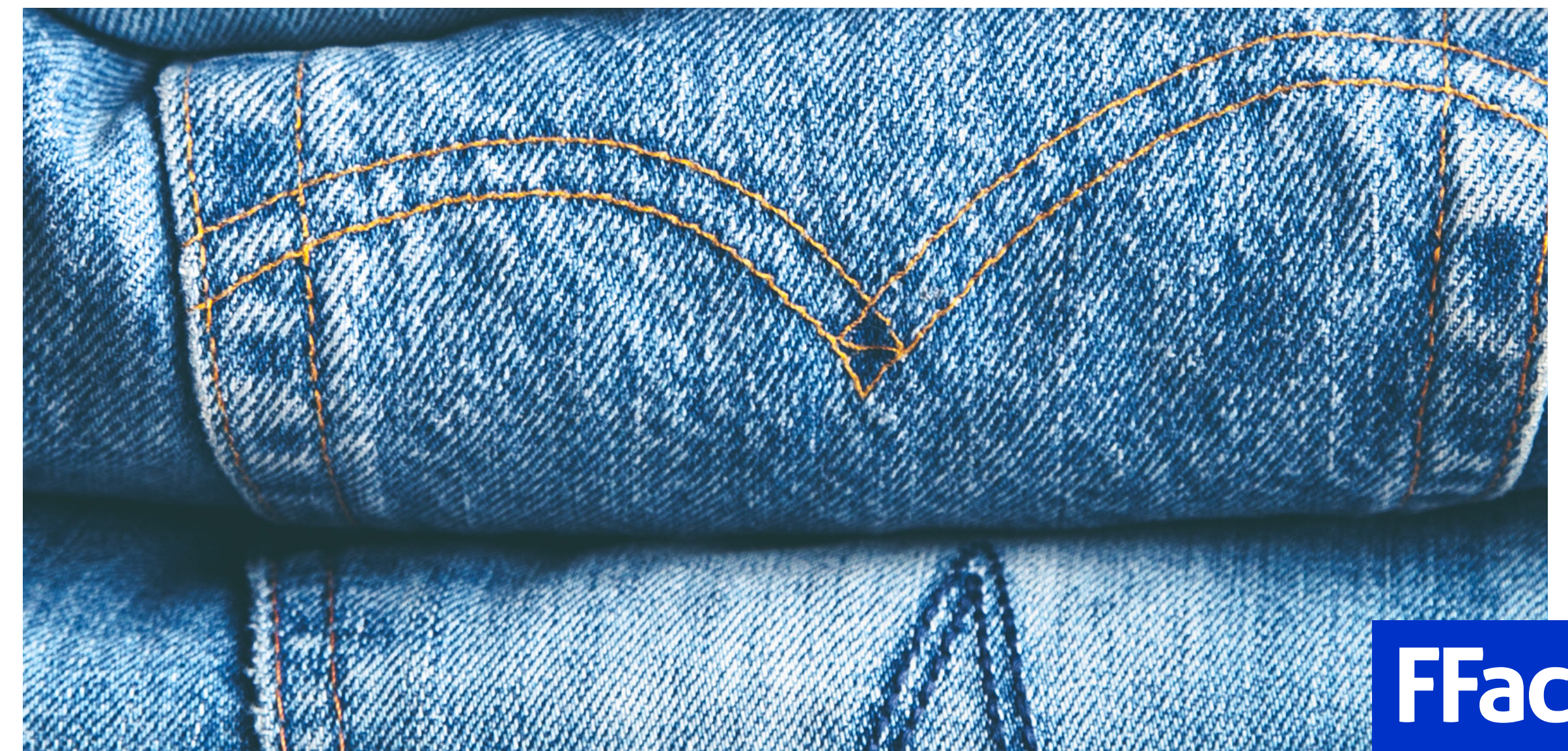
All 7 brands and retailers aim to achieve a minimum of 5% PCR content in their own denim collections during the Denim Deal. By working closely with other signatories from 2021 onwards (one company expects to achieve this in 2022).

Most brands and retailers (6 of 7) have set their own, more ambitious goals for PCR content in denim garments than the aimed new industry standard of 5%. Ambitious individual goals vary up from 10% – 20% to 80%, 90% and even 100% PCR-cotton at the end of 2023.



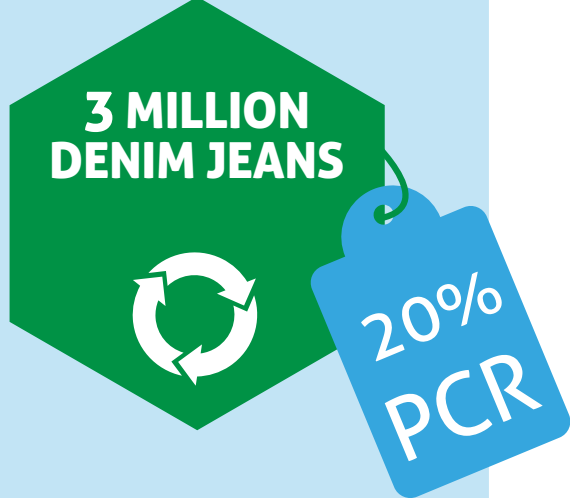
Results jeans

The participating brands and retailers have put in total 1,3 million jeans on the Dutch market in 2020. This is a relatively small part of the amount of jeans put on the Dutch market annually. From the volume put on the Dutch market by participants 105.033 jeans (8%) contains at least 20% PCR-cotton.

The results of the baseline measurement show for 2020 that 13% of the volume of jeans produced worldwide by participants contains at least 20% PCR cotton.



Summary per goal

1	<p>Brands and retailers will achieve a minimum of 5% PCR content in their own denim collections by working together closely with other signatories.</p> <p>Most participating brands and retailers expect to achieve 5% PCR in denim garments in 2023.</p>	 <p>MINIMUM AMBITION DENIM</p> <p>5% PCR</p>
2	<p>Brands and retailers will achieve their own, individual and higher goals for PCR content in denim garments, and will set out their ambitions and approach in individual roadmaps, based on the close collaboration with other signatories.</p> <p>Most brands and retailers even aim for a higher percentage of PCR in denim garments.</p>	 <p>DENIM FRONTRUNNER</p>
3	<p>Brands and retailers will commit to individual ambitions designed to achieve the specific, joint goal of using 20% PCR cotton fibres in 3 million pairs of jeans produced by these parties until the end of 2023.</p> <p>On the global market the number of 3 million 20% PCR jeans is achievable for the participants during 2021 – 2023, depending on their efforts. However, it will be a challenge to reach 3 million 20% PCR jeans on the Dutch market only. To achieve such amount during 2021 - 2023 would imply that nearly all jeans of the participating brands should contain 20% PCR. With the current number of brands this target will not be reached. It would take more brands and retailers in the Netherlands to join the Denim Deal.</p>	 <p>3 MILLION DENIM JEANS</p> <p>20% PCR</p>

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