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CASE STUDY

Sustainability in Saudi: Can Ethical Label Sadeem Dominate Arab Fashion?

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Sustainability in Saudi: Can Ethical Label Sadeem Dominate Arab Fashion?

Abstract

Saudi-born designer Aljawharah Sadeem Abdulaziz Alshehail (Alshehail) launched her slow-fashion, prêt-à-couture, sustainable fashion label, 'Sadeem', in the Kingdom of Saudi Arabia in 2016— at a time when the market was still in its nascency. Shocked to discover that fashion was the second-most polluting industry after oil and gas during her postgraduate studies, Alshehail realized she could do things better and launched Sadeem, an ethical luxury fashion brand, which not only embraced sustainable practices, but also collaborated exclusively with suppliers that shared the same values. By 2019, Sadeem had launched four collections: Manhattan, Deco, Nautical and Abwaab, and had showcased its collections in Paris, New York and Dubai. However, Alshehail faced several challenges in sourcing the materials, supervising production and even in terms of consumer awareness, the latter requiring a shift in preferences from fast fashion to responsible fashion. Operating in a region that was on the verge of burgeoning in the sustainability arena, would Alshehail be able to leverage Sadeem's ethical haute couture beyond the Kingdom and expand into the Arab sphere?

Case Study

*"Do not underestimate the consumer in this region. She is starting to understand that sustainable fashion is (necessary), and it will become a major part of regional fashion."*¹

*"When you say 'ethical fashion', you think tie-dye prints and hemp fabrics. I want to make luxury ethical."*²

— Aljawharah Sadeem Abdulaziz Alshehail (Alshehail)³

¹ Assomull, Sujata, "How Arab fashion is waking up to sustainability", <https://www.arabnews.com/node/1588041/lifestyle>, November 22nd, 2019

² "About", <http://www.bysadeem.com/about>

³ Aljawharah Sadeem Abdulaziz Alshehail is a Riyadh-based ethical luxury fashion designer and Founder of Sadeem.

An engine for global development, in the early 21st century the world's fashion industry mushroomed into a trillion-dollar enterprise that, in 2016 alone, generated '€1.5 trillion in annual apparel and footwear revenues'.⁴ In 2019, given a spike in consumer preferences for online shopping, global apparel shifted its focus towards e-commerce⁵ and, a year later, the global fashion industry was valued at nearly USD 3 trillion, of which apparel comprised USD 800 billion.⁶ But while 'sales of the traditional fast fashion-sector' grew rapidly, 'by more than 20 percent over the last three years'⁷ and accounted for nearly 4% of the world's gross domestic product,⁸ the industry had a lesser known, dark side to it.

As the world's second-largest polluter and consumer of water, fashion was responsible for generating more than 15.1 million tons of textile waste annually while textile manufacturing industries contributed nearly 20% of global greenhouse gas emissions.⁹ From pesticides in cotton farming to rejected clothing that choked landfills, the environmental impact of the fast fashion¹⁰ industry was too massive to ignore – second only to oil and gas. **(Annexure I)** Manufacturing 'somewhere between 80 billion and 150 billion garments a year globally', 'nearly three-fifths of all clothing produced' ended up in 'incinerators or landfills within years of being made.'¹¹ Fee Gilfeather, a sustainability expert at non-profit OXFAM¹², explained the ramifications of this: "It would take 13 years to drink the water that is used to make one pair of jeans and one T-shirt." He then added, "It's just an incredible amount of environmental resources that are required for making the clothing that we wear."¹³ **(Watch the video titled "Is Fashion Destroying the Planet? - Ethical Fashion Documentary" on YouTube at <https://youtu.be/YfoENTF8Lh0>)**

⁴ "Pulse of the Fashion Industry", https://globalfashionagenda.com/wp-content/uploads/2017/05/Pulse-of-the-Fashion-Industry_2017.pdf, 2017

⁵ Venkat, Nisha, "6 Sustainable Fashion Labels from the Middle East That Need to be on Your Radar", <https://en.vogue.me/fashion/sustainable-fashion-middle-east/>, May 22nd, 2019

⁶ Turrillo, Hernando, "AI and Blockchain and the \$3 Trillion Fashion Industry – Challenges and Opportunities", <https://www.fashionabc.org/ai-and-blockchain-and-the-3-trillion-fashion-industry-challenges-and-opportunities/>, March 16th, 2020

⁷ "10 Trends That Will Define the Fashion Agenda in 2018", <https://www.businessoffashion.com/articles/intelligence/10-trends-that-will-define-the-fashion-agenda-in-2018>, January 2nd, 2018

⁸ "AI and Blockchain and the \$3 Trillion Fashion Industry – Challenges and Opportunities", op.cit.

⁹ "6 Sustainable Fashion Labels from the Middle East That Need to be on Your Radar", op.cit.

¹⁰ Fast fashion is a contemporary term used by fashion retailers for designs that flow from the catwalk quickly to capture current fashion trends.

¹¹ Wicker, Alden, "Fashion has a misinformation problem. That's bad for the environment."

<https://www.vox.com/the-goods/2020/1/27/21080107/fashion-environment-facts-statistics-impact>, January 31st, 2020

¹² Oxfam is a confederation of 19 independent charitable organizations focusing on the alleviation of global poverty, founded in 1942 and led by Oxfam International.

¹³ Knight, Lizzie, "Sustainability in the fashion industry faces an uphill climb", <https://abcnews.go.com/Lifestyle/wireStory/correction-eu-fashion-sustainability-issues-story-68119669>, January 7th, 2020

As one of the leading players in the global economy wherein '1 in 6 people in the world' were somehow involved, the fast fashion industry – known for its unabashed focus on capital gains, excess and beauty – was increasingly mired with issues pertaining to environmental damage¹⁴ and exploitation of garment workers' rights,¹⁵ along with consumer shifts and a changing fashion system.¹⁶ **(Annexure II)** Disrupted further by evidence of increased global consumption,¹⁷ minimum wages equivalent to USD 22 per week (less than 45 cents per hour),¹⁸ and 'one of the largest industrial disasters in modern times' – the 2013 Rana Plaza garment factory collapse that killed 1,134 workers,¹⁹ the problems for fast fashion soon escalated and a 'heightened awareness toward the fashion industry's environmental impact' emerged.²⁰

In this troubling scenario, as an alternative to mainstream fashion, sustainable fashion started to gain traction and popularity in relevant circles. Also known as ethical fashion, slow fashion, green fashion and eco-fashion, the industry witnessed a gradual shift as several designers, brands, manufacturers and retailers – growing conscious of the irreversible effects of fast fashion – jumped onto the 'green' bandwagon and gravitated towards sustainability. Consequentially, fashion movements such as *#WhoMadeMyClothes* too played a significant role to usher in a certain degree of transparency to the backend processes of garment manufacturing,²¹ "in terms of giving people easy tools to be curious, find out, and to do something about it," according to fashion campaigner Carry Somers (Somers).²² While Bong Guerrero, Chief Executive Officer (CEO) and Co-Founder of Fashion Forward Dubai, believed that the focus on sustainability was primed to grow as a virtuous cycle,²³ Somers opined strongly that fashion should be an 'industry where environmental protection, as well as human rights, are the standard and not the exception.'²⁴ **(Watch the video 'Sustainable Fashion: Green is the New Black' on YouTube: <https://youtu.be/t4kdI2Nha4s>).**

¹⁴ Ghanem, Khaoula, "Introducing the Arab World's First Sustainable Clothing Brand", <https://en.vogue.me/fashion/rawan-maki-sustainable-clothing-brand/>, April 22nd, 2018

¹⁵ Dewans, Yasmin Khatun, "A Fashion Revolution in the Middle East?", <https://www.middleeasteye.net/features/fashion-revolution-middle-east>

¹⁶ "A Fashion Revolution in the Middle East?", op.cit.

¹⁷ Wu, Jennifer Xiaopei and Li, Li, "Sustainability Initiatives in the Fashion Industry", <https://www.intechopen.com/books/fashion-industry-an-itinerary-between-feelings-and-technology/sustainability-initiatives-in-the-fashion-industry>, August 6th, 2019

¹⁸ Blanchard, Tamsin, "Who made my clothes? Stand up for workers' rights with Fashion Revolution week", <https://www.theguardian.com/fashion/commentisfree/2019/apr/22/who-made-my-clothes-stand-up-for-workers-rights-with-fashion-revolution-week>, April 22nd, 2019

¹⁹ "A Fashion Revolution in the Middle East?", op.cit.

²⁰ "Sustainability Initiatives in the Fashion Industry", op.cit.

²¹ Khandual, Asimananda and Pradhan, Swikruti, "Fashion Brands and Consumers Approach Towards Sustainable Fashion", https://link.springer.com/chapter/10.1007/978-981-13-1268-7_3, June 22nd, 2018

²² "Who made my clothes? Stand up for workers' rights with Fashion Revolution week", op.cit.

²³ "How Arab fashion is waking up to sustainability", op.cit.

²⁴ "Who made my clothes? Stand up for workers' rights with Fashion Revolution week", op.cit.

But while sustainable fashion had 'bandied around all decade', it was only recently that brands and companies had started to take sustainability seriously, by incorporating 'green' practices within their manufacturing process. According to the Global Fashion Agenda (GFA), of the 93 global companies which represented 207 brands in 2017 (approximately 12% of global fashion), an estimated 75% improved their sustainability score during the 2016-2017 period.²⁵ (**Annexure III**) But despite such numbers, GFA believed that fashion companies were 'not implementing sustainable solutions fast enough to counterbalance negative environmental and social impacts of the rapidly growing fashion industry.'²⁶ In such regard, as testimony to the new 'direction' of the industry, the London Fashion Week went furless for the first time in September 2018 while the Helsinki Fashion Week went a step further by announcing a ban on all animal-based leather goods in its 2019 iteration.²⁷ Not one to be left behind, even the Milan Fashion Week participated by closing its event with a star-studded Green Carpet Awards segment during which Hollywood celebrity Cate Blanchett 'recycled' a 2014 piece to promote 're-using old clothing items as well as sustainable textile materials.'²⁸

But with eco fashion often side-lined as a 'niche option for shoppers with a conscience', consumers remained under immense social pressure in a status-driven, consumption-focused world. As pointed out by an anonymous participant at a recent roundtable discussion hosted by British daily The Guardian, there existed an 'intention-behaviour gap' wherein 'a consumer's intent to do the right thing is forgotten when they go into a shop.' Highlighting this 'disconnect', the participant opined, "All the fashion industry does is fulfil people's desires. We can try to appeal to people's better nature, but fundamentally we are status-driven; we use fashion to show we are on top of the pile. So we need a different status symbol."²⁹

Sadeem: Carving a Sustainable Fashion Brand in the Kingdom

For years, the idea of sustainability in the Middle East was not as widespread as it was in the West; however, of late, there had been a substantial shift in the former's approach with businesses,

²⁵ Hendriksz, Vivian, "Has the Global Fashion Agenda succeeded in making the fashion industry more sustainable?", <https://fashionunited.uk/news/fashion/has-the-global-fashion-agenda-succeeded-in-making-the-fashion-industry-more-sustainable/2018052329806>, May 23rd, 2018

²⁶ Danziger, Pamela N., "Coronavirus Will Force Fashion to A Sustainable Future", <https://www.forbes.com/sites/pamdanziger/2020/05/10/coronavirus-will-force-fashion-to-a-sustainable-future/#28cb28585292>, May 10th, 2020

²⁷ Dumitru, Cristina, "Thoughtful Threads: Ethical Consumerism and Fashion", <https://www.ibisworld.com/industry-insider/analyst-insights/thoughtful-threads-ethical-consumerism-and-the-fashion-industry/>, October 2nd, 2018

²⁸ Cooper, Rachel, "Milan Fashion Week closes with the Green Carpet Fashion Awards", <http://www.climateaction.org/news/milan-fashion-week-closes-with-the-green-carpet-fashion-awards>, September 25th, 2018

²⁹ Payton, Johanna, "A sustainable model for fashion", <https://www.theguardian.com/sustainable-business/sustainable-model-for-fashion>, March 19th, 2013

governments, and consumers recognizing the importance of sustainability. With a constant push from leadership circles in the region to adopt sustainability within social, environmental and economic spheres, the widespread presence of some of the renowned international fashion brands in the Middle East too played a catalytic role in raising awareness amongst consumers and retailers. Moreover, with sustainability labelled as one of the key themes for Dubai's Expo 2020 – the first ever World Expo to be hosted in the Middle East, Africa and South Asia (MEASA) region,³⁰ the timing was perfect. **(Watch the video titled “Sustainable Fashion in the Middle East” on YouTube at <https://youtu.be/1RsFaRbfAX8>)**

For the Kingdom of Saudi Arabia (Kingdom, Saudi Arabia), the concept of sustainability gained further visibility following the launch of the national economic transformation plan – Vision 2030, which was unveiled in 2016 by the Crown Prince, His Royal Highness Mohammad Bin Salman Bin Abdulaziz Al-Saud (HRH MBS). In this regard, an excerpt from the plan stated, ‘Preservation is also our responsibility to future generations and essential to the quality of our daily lives. We will seek to safeguard our environment by increasing the efficiency of waste management, establishing comprehensive recycling projects, reducing all types of pollution and fighting desertification. We will also promote the optimal use of our water resources by reducing consumption and utilizing treated and renewable water.’³¹ However, nestled in a market that was still in its nascent stages, the Kingdom was yet to fully incorporate sustainability and sustainable practices within its ecosystem.³²

The Setting: A ‘New’ Saudi Arabia Sans Abaya

Furthermore, courtesy of the Kingdom's Vision 2030 modernization plan, Saudi's fashion industry received a much-needed boost when HRH MBS clearly stated that conservative clothing for women in Saudi ‘does not particularly specify a black abaya or black head cover. The decision is entirely left for women to decide what type of decent and respectful attire she chooses to wear.’³³ But even with the country's religious police losing most of their power and Saudi witnessing ‘an expansion in women's rights’ which were ‘hailed as proof of a new progressive trend towards modernisation in the deeply conservative Muslim kingdom,’³⁴ such boundaries remained untested initially³⁵, given that

³⁰ Beig, Raza, “Sustainable fashion makes its way to the Middle East with Splash”, <https://www.europeanceo.com/lifestyle/sustainable-fashion-makes-its-way-to-the-middle-east-with-splash/>, September 27th, 2018

³¹ “Vision 2030- The Kingdom of Saudi Arabia”, <https://vision2030.gov.sa/download/file/fid/417>

³² “Fashion for Change”, <https://kintsugispace.com/fashion-for-change/>

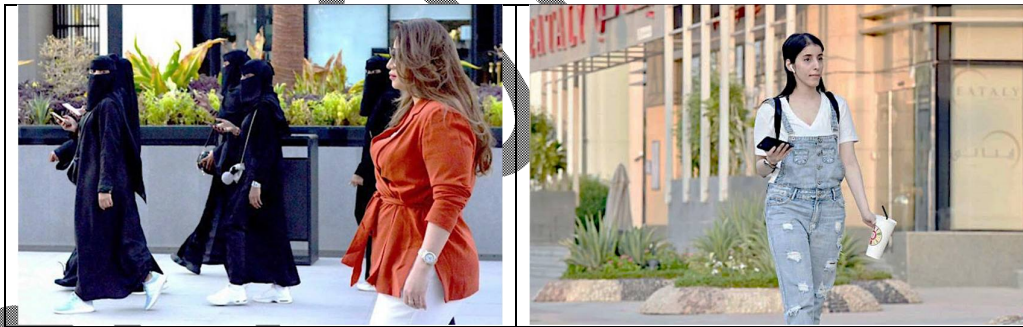
³³ “Saudi women in ‘inside-out abaya’ protest”, <https://www.bbc.com/news/world-middle-east-46222949>, November 15th, 2018

³⁴ Kalin, Stephen, “Saudi women should be able to choose whether to wear head cover or black abaya in public, says Crown Prince”, <https://www.independent.co.uk/news/world/middle-east/saudi-arabia-women-abaya-head-cover-crown-prince-mohammad-bin-salman-a8263446.html>, March 19th, 2018

³⁵ “Saudi women scrap traditional abaya in bold bid for more freedom”, <https://the arabweekly.com/saudi-women-scrap-traditional-abaya-bold-bid-more-freedom>, September 21st, 2019

there were no official regulations specifying women's dress codes.³⁶ But with time, women began to 'test the limits' of the relaxed dress code and it became increasingly common for women to uncover their hair³⁷ and opt for 'light blues and pinks in stark contrast with the traditional black' while abayas over long skirts or jeans became more common in some parts of the country.³⁸ As a result of such reforms, Saudi topped the rankings as the best country for women in the Arab sphere, at the 89th position, followed by Oman and Jordan at the 91st and 96th position, respectively.³⁹ According to historian Ellen R. Wald, "Women are now able to walk around Riyadh in conservative Western clothing as they would in New York or London."⁴⁰ **(Exhibit I)** In some extreme instances, Saudi residents such as 25-year-old Manahel Otaibi even stepped out of her house sans abaya and believed she did no wrong because "that there is no law criminalizing wearing something as long as it's modest dress."⁴¹

Exhibit I Women in Saudi Arabia Sans Abaya



Source: "Saudi women scrap traditional abaya in bold bid for more freedom",
<https://theArabweekly.com/saudi-women-scrap-traditional-abaya-bold-bid-more-freedom>,
 September 21st, 2019

³⁶ "Saudi women should be able to choose whether to wear head cover or black abaya in public, says Crown Prince", op.cit.

³⁷ "Saudi women pushing the limits of their dress code",
<https://businessmirror.com.ph/2019/10/06/saudi-women-pushing-the-limits-of-their-dress-code/>,
 October 6th, 2019

³⁸ "Saudi women should be able to choose whether to wear head cover or black abaya in public, says Crown Prince", op.cit.

³⁹ Salama, Samir, "Saudi Arabia ranked Arab world's best country for women in 2020",
<https://gulffnews.com/world/gulf/saudi/saudi-arabia-ranked-arab-worlds-best-country-for-women-in-2020-1.1593232630206>, June 27th, 2020

⁴⁰ Wald, Ellen R., "Kingdom's new dress code a boost for businesswomen",
<https://www.arabnews.com/node/1572636>, October 22nd, 2019

⁴¹ Bulos, Nabih, "Saudi women, bucking tradition, forgo abaya", <https://www.latimes.com/world-nation/story/2019-09-22/saudi-women-bucking-tradition-forgo-abaya>, September 22nd, 2019

Following such liberation, Saudi's Ministry of Culture⁴² (MOC) strove to further cultivate the Kingdom's fashion sector as even international brands began catering to modest fashion in the region. Subsequently, in 2019, Saudi launched its flagship fashion event – Fashion Futures – which was touted to 'serve as a platform to create dialogue between Saudi talent and the international fashion industry'. On this, Abdulkarim Alhumaid, the official spokesperson for Saudi's MOC, said, "Fashion Futures is the first important step on a journey to transform the Saudi fashion industry from a nascent under-developed sector to a flourishing hub of creativity and innovation." He then added, "By bringing together a diverse group of fashion experts from both the Kingdom and around the world we are facilitating international cultural exchange; providing Saudi fashion professionals with the opportunity to learn from some of the best in their respective fields, while offering a platform to showcase their talent to a global audience."⁴³

But in terms of homegrown talent, as of early 2020, Saudi only had a handful of 'established or up-and-coming' renowned ethical luxury fashion designers such as Layla Moussa⁴⁴, Daneh Buahmad⁴⁵, Nora Al Shaikh⁴⁶ and Alshehail who focused on notions of sustainability and had made an impression in the international fashion arena.⁴⁷ On this, Saudi designer Nabila Nazer suggested, "I believe that talented Arab women, in particular, require substantial levels of support and encouragement when it comes to pursuing their aspirations and dipping into their dreams to make them a reality."⁴⁸ To facilitate the relevant support, Saudi's Vision 2030 agenda sought to promote such initiatives and similar ones through the formation of the General Authority for Small and Medium Enterprises (Monsha'at). Operational since 2015, Monsha'at offered support and sought to raise the contributory role of businesses, particularly of those owned by women, from all industries, including fashion, **(Exhibit II)** from SAR⁴⁹ 500 billion in 2014 to SAR 2 trillion by 2030.⁵⁰

⁴² Launched on March 27th, 2019, Saudi's Ministry of Culture symbolized the national and international advancement of culture in the Kingdom and was tasked to preserve the country's historical past while promoting a culturally rich future that fostered art and culture.

⁴³ Abusief, Fatma, "Welcome to Fashion Futures, Saudi Arabia's first ever fashion event", <https://emirateswoman.com/fashion-futures-saudi-arabia/>

⁴⁴ Saudi fashion designer who, based in Jeddah, has dedicated herself to showcasing artisanal craft.

⁴⁵ Dubai-based Saudi designer Daneh Buahmad transforms luxurious textiles into a modern wardrobe using materials cotton, viscose, Tencel, and jacquard.

⁴⁶ Based in Jeddah, Nora Al Shaikh produces three collections a year: Ramadan, pre-fall, and resort, to create contemporary clothes that translate to different cultures, yet maintain a distinctly Saudi attitude in terms of proportions and juxtaposition of materials like fine brushed cottons and techno textiles.

⁴⁷ Moussa, Layla, "Kingdom Come: Meet Six Saudi Arabian Designers Changing the Face of Fashion", <https://en.vogue.me/fashion/designers/kingdom-come-six-saudi-arabian-designers/>, June 2018

⁴⁸ Yahya, Samar, "A thriving fashion industry emerging in KSA", <https://saudigazette.com.sa/article/40273>, April 12th, 2013

⁴⁹ Approximate Exchange Rates: 1 Saudi Riyal = 0.2668 US Dollar

⁵⁰ Paton, Elizabeth, "Saudi Arabia Just Had Its First Fashion Week", <https://www.nytimes.com/2018/04/16/fashion/saudi-arabia-fashion-week.html>, April 16th, 2018

Exhibit II

Saudi Arabia's Apparel and Fashion Market Overview

Apparel Market	Fashion Market
<ul style="list-style-type: none">▪ In 2020, revenue in Saudi's apparel segment was projected to reach USD 1,213 million in 2020.▪ Revenue was expected to grow at a CAGR⁵¹ of 5% between 2020-2024, resulting in a projected market volume of USD 1,475 million by 2024.▪ User penetration is 49.9% in 2020 and is expected to hit 66.4% by 2024.▪ The Average Revenue per User (ARPU) currently amounts to USD 69.91.▪ In global comparison, most revenue will generate in China (USD 192,818 million in 2020).	<ul style="list-style-type: none">▪ Revenue in the Fashion segment was projected to reach USD 2,058 million (2020).▪ Revenue is expected to show an annual growth rate (CAGR 2020-2024) of 4.7%, resulting in a projected market volume of USD 2,469 million by 2024.▪ The largest segment is apparel with projected market volume of USD 1,213 million (2020).▪ In global comparison, most revenue will generate in China (USD 284,311 million in 2020).

Compiled by the Author from the following sources:

- 1) "Apparel: Saudi Arabia", <https://www.statista.com/outlook/249/110/apparel/saudi-arabia>
- 2) "Fashion: Saudi Arabia", <https://www.statista.com/outlook/244/110/fashion/saudi-arabia>

Childhood to Couture: The Early Years

Born into a progressive Saudi Arabian family, wherein her parents' passion for education 'fostered a profound sense of curiosity in the minds of their children', right from an early age, Alshehail was a well-learned child with a curious mind and creative hand. Spending her formative years learning the innate intricacies of fashion in her hometown of Riyadh, Alshehail recalled her first encounter with fashion during the time she spent at her aunt's atelier witnessing designs come to life. On this, Alshehail reminisced that watching her aunt's "sketches turn into beautiful creations birthed a desire to create and execute my own designs."⁵²

Speaking further about her journey in fashion, Alshehail said, "For as long as I remember, I've been surrounded by the topic of fashion and style. It wasn't only about clothes; it was a way of living." She then added, "I'm a child of the 70s. Growing up in Riyadh required wearing specific attire that fit our customs and occasions. There were few stores that sold ready-to-wear clothes. Most households relied on their neighborhood or house seamstress to build a fitting wardrobe. When we travelled for holidays, shopping clothes for the entire year was a necessity. I remember the joy of customizing long

⁵¹ Stands for compound annual growth rate and refers to a representational percentage that shows how much a sector, business or anything else has grown or will grow in a time-gap of at least two years.

⁵² D'souza, Tanika, "Sadeem Alshehail: Haute Scholarship", <https://www.harpersbazaararabia.com/fashion/the-style/sadeem-alshehail-haute-scholarship>, April 18th, 2017

skirts for each outfit bought abroad. Burda sewing patterns were a must-have, and people ended up redesigning international trends with a modest and conservative twist.”⁵³

Upon receiving her bachelor’s in Fashion Design and Merchandizing from Marymount University in Arlington, Virginia, Alshehail returned home in 2000 and worked as a Senior Buyer at Harvey Nichols’ first international store in Riyadh for a few years, honing her skills and developing an understanding of the nuances of fashion. On her experience at the British department store chain, she said, “When they began, they quickly discovered the clothes weren’t really compatible with the Saudi market and realized they needed locals who understood the market. I was put in charge of three departments—international luxury designer wear, eveningwear, and shoes.” Describing it as ‘an exciting time’, Alshehail spent considerable time ‘travelling between London, Milan, New York and Paris two or three times a year.’⁵⁴

Following her three-year stint at Harvey Nichols, Alshehail delved into the world of entrepreneurship with her inaugural venture – a boutique called SadaShop that was accompanied by an e-commerce website – which did not take off. Talking about the business, Alshehail said “We had worked on the business plan since 2007 and finally launched the business in 2010. It was called SadaShop. Sadly, the business was short-lived. It lasted only three years. I think this was mainly because at that time people in Saudi Arabia weren’t ready to put their trust in e-commerce. We’re talking about 2010. People only trusted established names. In terms of marketing and sales, it wasn’t easy. I wouldn’t go so far as to say we failed, but it was certainly very difficult and expensive to run the e-commerce platform.”⁵⁵ Having wound down SadaShop, Alshehail returned to the States in 2009 for a Master’s in Design Management from Pratt Institute in New York City (NYC).⁵⁶

The Eureka Moment

Looking to ‘to acquire all the managerial skills I needed to build my own fashion ‘empire’’, as Alshehail thought, little did she realize that her ‘priorities would change completely’ during said program. As discussions veered towards the United Nations’ development goals, Alshehail learned about sustainability, the environment, and the triple bottom line – people, planet and profit, but was shocked to discover the ‘dark side’ of the industry. Realizing that fashion was responsible for a lot of

⁵³ Minthe, Caterina, “This Saudi Designer’s Slow Fashion Brand Merges Sustainability and Style”, <https://en.vogue.me/fashion/saudi-arabian-sadeem-slow-fashion-sustainable/>, June 10th, 2019

⁵⁴ Wahab, Quratulain, “Making luxury ethical”, <https://lucire.com/2019/1003fe0.shtml>, 2019

⁵⁵ “Making luxury ethical”, op.cit.

⁵⁶ “Sadeem Alshehail, Sustainable Luxury”, <https://www.essentialmagazine.com/sadeem-alshehail-sustainable-luxury/>, April 12th, 2018

environmental damage,⁵⁷ Alshehail vowed 'that she wasn't only going to design beautiful clothes, but impactful solutions too.'⁵⁸

The Birth of Sadeem

Against this backdrop, in 2016 – armed with rich experience in the luxury segment and looking to capitalize on the ongoing liberalization and increased participatory role of women in the workforce – 'an economic bet that is sure to pay off'⁵⁹ – Alshehail launched Sadeem, a prêt-à-couture⁶⁰ ethical fashion label⁶¹ which was 'centered on creating collectible high-end pieces for a woman who is confident, elegant and sophisticated; a woman who is looking for timeless, well-made and versatile attire.' In such regard, clothes made by Sadeem were not only luxurious and timeless but were also environmentally friendly, with all fabrics sourced from firms that had employed sustainable practices. As stated on its website: "Sadeem's garments are designed and created with a focus on quality and a very acute attention to detail, resulting in clean lines and a luxurious feel. An advocate of sustainable design, Sadeem embraces ethical practices, collaborating with companies that share the same principles. Sadeem's fabrics are non-toxic and are sourced from companies that employ sustainable practices."⁶²

Speaking about what sparked her interest, Alshehail attributed Sadeem's sustainability and ethical design practices to the time she'd spent in the States where she studied extensively on responsible designs. "It was there that I realized that everything around us has a designer behind it. As designers, it is our duty and obligation to create things 'cradle to cradle'. We all need to be aware of how materials are sourced, we have to consider where they will end up, what their life cycle is, and most importantly, what impact they will have on our environment and society," she said.⁶³ In such regard, sustainable fashion brand builder, Femke Speelman, clarified that the true concept of sustainability meant that "you are looking at your full business spectrum, from sourcing yarns to making fabrics to shipping the finished goods to your customers. Not to mention the labels, tags and packaging you're using for your products."⁶⁴

⁵⁷ "Making luxury ethical", op.cit.

⁵⁸ Caspelich, Katrina, "Spotted at Paris Fashion Week: Social A-wear-ness", <https://remake.world/events/spotted-at-paris-fashion-week-social-a-wear-ness/>, June 8th, 2018

⁵⁹ Vogelstein, Rachel, "Women Can Drive Now in Saudi Arabia. Here's What They Still Can't Do", <https://fortune.com/2017/09/28/saudi-arabia-women-driving-%20economic-effect/>, September 29th, 2017

⁶⁰ Pret-a-Couture refers to ready to wear high end fashion.

⁶¹ Bellheather, Diana, "Ethical style", <https://emirateswoman.com/three-reasons-to-love-saudi-label-sadeem/>, July 11th, 2019

⁶² "About", <http://www.bysadeem.com/about>

⁶³ "Sadeem Alshehail, Sustainable Luxury", op.cit.

⁶⁴ "The Real Price of Fashion", <https://thesustainableist.ae/the-real-price-of-fashion/>, July 5th, 2018

Interestingly, even on the personal front, Alshehail was committed to a holistic way of life – which she conveyed through her personal closet full of slow-fashion brands, local designers and vintage pieces inherited from her mother.⁶⁵ This was also reflected in the core value of Sadeem which was ‘to provide fashion that has a positive impact on the global environment and society’.⁶⁶ Working only with textile mills that were eco-friendly and did not mass produce, to ensure that there is no waste,⁶⁷ Alshehail said, “I’ve been sourcing my textiles from factories in Japan and Italy that employ ethical labor laws, renewable energy, and waste and water reduction management.”⁶⁸ However, she was quick to add that “Regional suppliers were keen to bring in what I needed.”⁶⁹

Sadeem’s Sustainable Fashion Business Model

In the world of fashion, haute couture followed one of the more sustainable and ethical practices in which all the pieces were handmade and made-to-order. Speaking about how she practiced ethics and sustainability across all aspects of Sadeem’s sustainable business model (**Exhibit III**), Alshehail said, “When people talk about ‘ethical fashion’, they’re normally thinking about tie-dye prints and hemp fabrics. I try to go beyond that by putting my values into action. It’s about the triple bottom line I talked about—people, planet, profit—which I try to apply to everything I do. It’s about how the clothes are made, where they’re made, and how long they’ll last. I don’t mass-produce anything. I do things that are made to order because I hate the idea of getting stuck with inventory. I always try to make sure the facilities I work with pay fair wages and that factories use renewable energy. All of that takes time and effort but I won’t compromise on my values. I’ve shown my collections in Paris, New York and Dubai and I’ve found more and more people are beginning to understand the need to make the fashion industry more environmentally friendly. I don’t market myself as a “green” designer, because this should be the norm. That said, I’m happy to say that in the past year I’ve been approached by retailers that are focusing more on ethical fashion. It’s great to see that more people are starting to care.”⁷⁰

Exhibit III

Operating Model of Sustainable Fashion Businesses

⁶⁵ “Saudi Fashion Designers: The Women Shaking Up the Industry Across the Middle East”, op.cit.

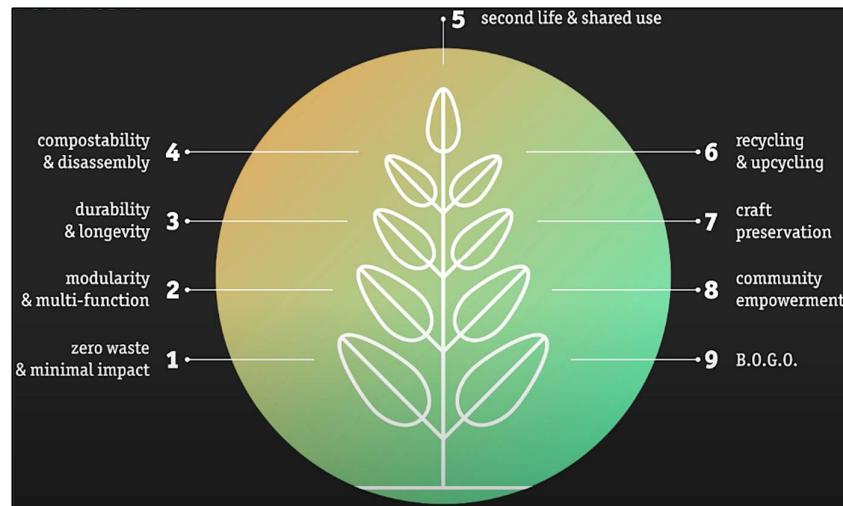
⁶⁶ “About”, op.cit.

⁶⁷ “How Arab fashion is waking up to sustainability”, op.cit.

⁶⁸ “Saudi Fashion Designers: The Women Shaking Up the Industry Across the Middle East”, op.cit.

⁶⁹ Minthe, Caterina, “Sadeem on Building a Sustainable Brand”, <https://en.vogue.me/fashion/sadeem-spring-2018-rtw-review-ffwd/>, October 29th, 2017

⁷⁰ “Making luxury ethical”, op.cit.



Source: Screen Grab from the video titled “Sustainability Snack. Operating Models of Sustainable Fashion Businesses” on YouTube at <https://youtu.be/NQahqfy8wIY>

Choosing to operate within such realms, Alshehail channelled her creativity and, by paying close attention to detail, Sadeem’s pieces were well-designed, classy and inspired by Saudi folklore, architecture, famous heroines and silver-screen sirens while promoting ethical practices through collaborations solely with companies that shared the same principles.⁷¹ Focused on timeless designs that were ideal for those who liked elegant modest wear,⁷² Alshehail said, “Sadeem is a slow-fashion brand. I don’t follow seasons or trends.”⁷³

While building Sadeem’s portfolio, Alshehail opted mostly for silk fabrics that were both, durable and biodegradable, and worked with textile mills that used eco-friendly printing and dying.⁷⁴ “I love working with innovative and naturally sourced materials. The 100 per cent silk fabrics used in my MANHATTAN collection⁷⁵ are treated with Nano technology (stain free). So, I’m happy to let my clients know that they will be saving on energy and water, as they do not need to wash their garments,” said Alshehail.⁷⁶

Sadeem’s Growth

⁷¹ Bellheather, Diana, “How Saudi label Sadeem is introducing sustainability to couture”, <https://emirateswoman.com/three-reasons-to-love-saudi-label-sadeem/>, July 11th, 2019

⁷² “How Saudi label Sadeem is introducing sustainability to couture”, op.cit.

⁷³ Singh, Amrita, “Sustainable & Stylish: Why Sadeem Is the Saudi Arabian Brand to Know”, <https://www.abouthether.com/node/21736/fashion/fashion-news/sustainable-stylish-why-sadeem-saudi-arabian-brand-know>

⁷⁴ “This Saudi Designer’s Slow Fashion Brand Merges Sustainability and Style”, op.cit.

⁷⁵ MANHATTAN was Sadeem’s debut collection as an ode to New York.

⁷⁶ “Sadeem Alshehail, Sustainable Luxury”, op.cit.

In 2016, Alshehail launched her debut collection 'MANHATTAN' as an ode to New York, the city where she first learnt about sustainability and ethics in fashion. Speaking about her designs, she said, "The collection is an homage to New York; the city where my heart is and where I've lived for many years." She then added, "Although the designs are minimal, there's a lot of attention to detail. I chose black and white because these are basic colors that you can wear anytime of the year. Many of the pieces were created with a 'zero-waste' policy. I took whatever fabrics were left over and tried to see what else I could do with them."⁷⁷ Interestingly, through the collection's designs, Alshehail's love for the city was evident through 'clean silhouette lines and Art Deco ornaments', which were inspired by the Empire State Building and Chrysler Building. Even the 'poetic justice of art imitating life, or in this case, art imitating art,' was evident in the way the Saudi designer paid her respects to the complex simplicity of New York's architecture. All in all, MANHATTAN reflected the time she'd spent to ensure each of her creations fully embodied the principles by which they were inspired, while simultaneously carving a niche of their own.⁷⁸ **(Exhibit IV)** But while the majority of the collection was an ovation to the bold geometric forms of Cubism and the complete modernity of the Art Deco era, the other aspects of Alshehail's couture collection alluded to similar notions of sleek simplicity but with an emphasis on craftsmanship and material.⁷⁹

In collaboration with fellow Saudi designer, Her Royal Highness Princess Nourah AlFaisal (HRH Princess Nourah), founder and designer of Nuun Jewels, Alshehail's second collection, DECO, celebrated the sophistication of yesteryears. Speaking about the project, Alshehail said, HRH Princess "Nourah and I found that we share a love of timeless elegance and we believed that our design aesthetics would complement each other well."⁸⁰ She then added, "Of course, I jumped at the opportunity because I personally love Princess Nourah's jewellery. The fashion show was a beautiful experience and it was there that I was discovered by an editor from Vogue magazine. My designs began to attract more attention and I was invited to take part in Fashion Forward in Dubai."⁸¹ **(Watch the video titled "Fashion Forward October Edition 2019: Sadeem" on YouTube at https://youtu.be/EJdAIH_QcDE)**

⁷⁷ "Making luxury ethical", op.cit.

⁷⁸ "Sadeem Alshehail: Haute Scholarship", op.cit.




⁷⁹ "Making luxury ethical", op.cit.

⁸⁰ "Sadeem Alshehail: Haute Scholarship", op.cit.

⁸¹ "Making luxury ethical", op.cit.

Exhibit IV

Sadeem's Debut Collection: MANHATTAN

Chrysler Top - Empire Pants	Streamline Top - Empire Pants	Manhattan Top - Pylon Pants
		

Source: "MANHATTAN", <http://www.bysadeem.com/manhattan>

In October 2017, Alshehail launched her third collection, NAUTICAL, a luxury line that catered to the contemporary woman on a summer holiday. Inspired by sailor suits, seashell shapes and the glamorous yachting lifestyle, the collection offered timeless silhouettes; from daytime to sophisticated night-time looks.⁸² (Watch the video 'FFWD October 17: SADEEM' on YouTube <https://youtu.be/quXTEiwFGAk>). Discussing the rationale behind the collection and what made it disruptive, Alshehail said, "I'm proud that my company produces a sustainable and eco-friendly line, and all fabrics used are certified non-toxic materials made in Japan. Also, the garments were ethically constructed in Dubai's very own Design District."⁸³

Alshehail launched her fourth collection ABWAAB (which meant 'doors' in Arabic) and was dedicated to the Kingdom. As a young girl, Alshehail had often listened to her mother talk about how each tribe in Saudi had its own design motifs and types of embroidery, and 'people identified where you came from by what you were wearing'. Drawing on her knowledge of such traditions and folklores and adding a modern twist to the collection, each piece was named after a different town, city or region like Najd, Makkah, al-Ahsa, etc. Interestingly, representing her 'roots and aspirations for a bright and empowered future', one of the pieces was named after the historic city of al-Ula while another was called NEOM – after a new high-tech city being built near the Red Sea – and was quite futuristic in design.⁸⁴ As stated on the company's website, 'ABWAAB is a collection that was inspired by a nation

⁸² "Nautical", <http://www.bysadeem.com/nautical-1>

⁸³ Jardine, Emily Julia, "Meet the designers who are taking Mideast fashion forward", <https://www.arabnews.com/node/1183716/fashion>, October 27th, 2017

⁸⁴ "Making luxury ethical", op.cit.

moving forward without letting go of the past. It's about standing tall and being proud. It's about new opportunities and beginnings. The designs are a contemporary take on the motifs found in the native folklore, architecture and jewellery.⁸⁵ **(Exhibit V)**

Exhibit V

Sadeem's Fourth Collection: ABWAAB



Source: "ABWAAB", <http://www.bysadeem.com/abwaab>

Nodding more directly to her native homeland, the designer said, "Saudi has been exploring many of its untapped resources, with a very determined plan," then added, "Simple initiatives by our leadership has truly evolved the mindset and quality of living in Saudi Arabia."⁸⁶ With her collections displayed in top-tier cities across three continents, Alshehail was soon recognized as a leader in sustainable design.⁸⁷

Consequently, by 2019, Alshehail's wardrobe requisites had evolved to mirror the Kingdom's developments and showcase her ambitions to further the circular economy, while shying away from the linear and recycling version. **(Exhibit VI and Annexure IV)** Speaking about how Sadeem contributed to this economy, Alshehail said, "Designs should be timeless and sewn with high quality in an environmentally friendly and ethical manner." She then continued, "When an item is no longer desired, I hope that it would be swapped or handed to a friend, a second hand shop, or donated to charity. If the garment is too worn, it can be sent to a textile recycling facility, where it can be reused for new clothes or other fabric products."⁸⁸ Affirmatively speaking, she opined, "Eco-friendly

⁸⁵ "ABWAAB", <http://www.bysadeem.com/abwaab>

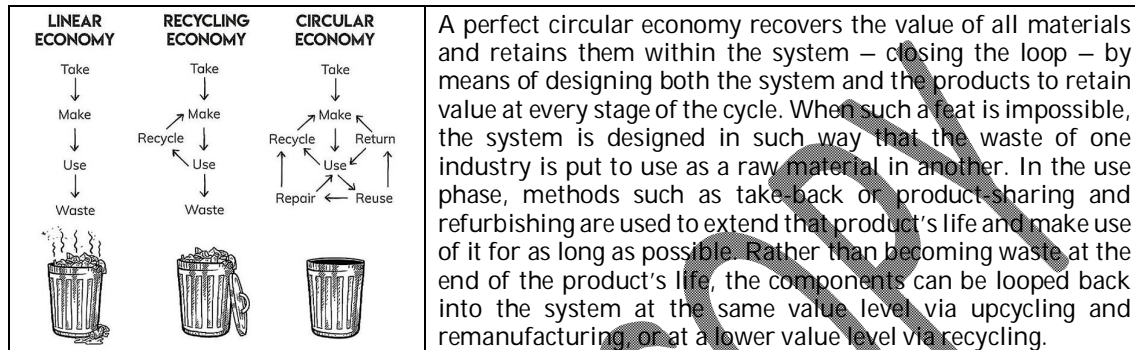
⁸⁶ "Sustainable & Stylish: Why Sadeem Is the Saudi Arabian Brand to Know", op.cit.

⁸⁷ "This Saudi Designer's Slow Fashion Brand Merges Sustainability and Style", op.cit.

⁸⁸ ibid.

materials and high-quality tailoring are costly, but made to last. Fast fashion has made it easy for people to forget that when you pay next to nothing for an outfit, someone else is paying for it.”⁸⁹

Exhibit VI Circular Economy



Compiled by the Author from the following sources:

- 1) Eric Schaffner, “Circular Economy”, <https://medium.com/@zeloop/circular-economy-5ac5583c7eb1>, February 1st, 2020
- 2) Meilani, “The Circular Economy: More than Just ‘Recycling Better’”, <https://community.materialtrader.com/the-circular-economy-more-than-just-recycling-better/>, February 9th, 2019

Can Sadeem Revolutionize Sustainable Luxury Fashion?

En route to establishing a name for herself in Saudi and the wider regions’ sustainable luxury fashion industry, Alshehail faced several challenges, some of which were specific while others broadly impacted the entire segment. Her primary concerns, initially, related to the sourcing of fabrics and the production process. Speaking about the former, she explained how she tried everything she could to follow sustainable practices which also meant selecting the right suppliers, using non-toxic dyes, etc. and even used pure silk because ‘it’s a biodegradable fabric. If it’s mixed with any fibre, it’s much harder to recycle.’⁹⁰ But, she added, “I have recently discovered that we can create faux-leather materials from pineapples, and silk like materials from oranges. This is very exciting news to me, as its biodegradable and socially responsible.”⁹¹ Moving on, talking about the process and problems she encountered with MANHATTAN, Alshehail said, “You have to start with samples and fittings and it often took a while to perfect the designs. Sometimes you visualize and sketch a design in a particular

⁸⁹ “Sustainable & Stylish: Why Sadeem Is the Saudi Arabian Brand to Know”, op.cit.

⁹⁰ “Making luxury ethical”, op.cit.

⁹¹ “Sadeem Alshehail, Sustainable Luxury”, op.cit.

way but when you cut the fabric, it doesn't look the same. These were the things I learned along the way."⁹²

Post the mid-1970s, in the quest to keep retail prices low, overseas garment factories had become 'synonymous with low and exploitative wages.' In such circumstances, with every part of the production cycle 'squeezed into days and hours rather than weeks', by enforcing often unpaid overtime, workers were allegedly 'locked inside factories at night to finish orders, subjected to intimidation and even violence to make them feel they have no choice but to stay.'⁹³ Nodding to such issues, Alshehail mentioned that "Sometimes, naturally made and dyed fabrics are produced in very poor countries with sweatshop labor conditions." "Thankfully, being green is starting to become trendy, and some companies are taking initiatives towards sustainable practices, by using alternative energy powers, and producing innovative products," she then added.⁹⁴ **(Annexure V)**

Shifting her focus to the other challenges she faced in bringing her couture to the international platform, the Saudi designer said, "In today's world, bringing a fashion brand to an international audience is becoming easier to achieve by the day. Thanks to e-commerce and social media platforms, marketing a brand to the world is now just a click away! The only challenge here, would be getting more likes, retweets, and shares that would eventually lead to media coverage and sales."⁹⁵

In terms of competition, there were several other Arab fashion designers in the Kingdom and wider region, some of whom, like Alshehail's ethical luxury fashion label, engaged in related practices. **(Annexure VI)** One such promising ethical fashion label was Herfah by Naeema. Launched in 2015 by the aunt and niece designer duo, Naeema and Shad Alshuhail (Shad), to empower artisans in the country, the ready-to-wear label celebrated Saudi craftsmanship and heritage in a contemporary way. Speaking about Herfah by Naeema's vision, Shad said, "Our aim is to generate sustainable employment for these women. Their techniques have been practiced for generations." Then, referring to customers' levels of awareness, she added, "Our customers appreciate beauty and quality but are conscious of their impact. They're selective and make a long-term investment to preserve and even pass down clothes."⁹⁶ On this, however, Saskia Hedrich, a Senior Expert on Apparel, Fashion & Luxury at McKinsey & Company, argued that while "Some of the more informed consumers are aware of the complex social and environmental issues associated with the fashion market and how their shopping

⁹² "Making luxury ethical", op.cit.

⁹³ Siegle, Lucy, "Why fast fashion is slow death for the planet", <https://www.theguardian.com/lifeandstyle/2011/may/08/fast-fashion-death-for-planet>, May 8th, 2011

⁹⁴ "Sadeem Alshehail, Sustainable Luxury", op.cit.

⁹⁵ ibid.

⁹⁶ "Kingdom Come: Meet Six Saudi Arabian Designers Changing the Face of Fashion", op.cit.

habits contribute," "other consumers often don't fully get what 'sustainability' really means."⁹⁷ But reiterating Herfah by Naeema's support for ethical fashion, Shad quipped, "I believe that our choices matter and make a difference."⁹⁸

Alshehail, however, in contrast, believed Sadeem should continue working and collaborating with charitable foundations, empower underprivileged communities, and seek to preserve heritage handmade products by artisans. Sadeem, she said, also planned to reach a wider market and dress celebrities on 'red carpets.'⁹⁹ In such regard, with plans to visit the *Première Vision* in Paris, a trade fair for textiles, Alshehail opined, "I'm very happy to hear that this year they have a whole section of the trade fair dedicated to sustainable fabrics. I'm so happy with the direction the global fashion industry is taking. A few weeks ago, Zara announced it was working on a roadmap to sustainability. This was music to my ears. I'm a hundred per cent against fast fashion. Zara is one of the giants of the fashion industry and is converting to green fashion. Once you have a brand like Zara take such a step, others will quickly follow."¹⁰⁰ But Emily Farra, a Senior Fashion Writer at *Vogue*, was a bit less optimistic on the movement gaining instant traction, "Sustainability has only recently gone mainstream in Western fashion, so Saudi Arabia has several hurdles to clear before it can really address it (for starters, it needs a real garment industry)."¹⁰¹

Amidst such developments, industry experts believed that, on a large scale, sustainable fashion presented major challenges for designers and brands. In such regard, one expert opined that 'there is an "inevitability" that brands will make sustainability desirable to the consumer,' then added, "Consumers may demand large-scale change for aspirational reasons, but the fashion industry will have to deliver it for economic reasons – or it will fail."¹⁰² On the other hand, Sarah Willersdorf, BCG's partner and Global Head of Luxury, believed that, moving forward, consumers would 'be far more selective with a mindset toward quality, value and sustainability. They will be concerned about where fashion comes from, that it is ethically manufactured, and that it is as good as it can be for the environment.'¹⁰³

As pointed out by HRH Princess Nourah, who was also an advisor to Saudi's MOC, "As the Kingdom develops on many fronts, we see a place for the Kingdom on the global stage, not least because we are

⁹⁷ Dixon, Emily, "The problem with 'sustainable fashion'", <https://edition.cnn.com/style/article/the-problem-with-sustainable-fashion/index.html>, October 11th, 2019

⁹⁸ "Kingdom Come: Meet Six Saudi Arabian Designers Changing the Face of Fashion", op.cit.

⁹⁹ "Sadeem Alshehail, Sustainable Luxury", op.cit.

¹⁰⁰ "Making luxury ethical", op.cit.

¹⁰¹ Emily, Farra, "These Designers Are Changing the Look (And Future) of Fashion in Saudi Arabia", <https://arabfashionweek.org/designers-changing-look-future-fashion-saudi-arabia/>, 2018

¹⁰² "A sustainable model for fashion", op.cit.

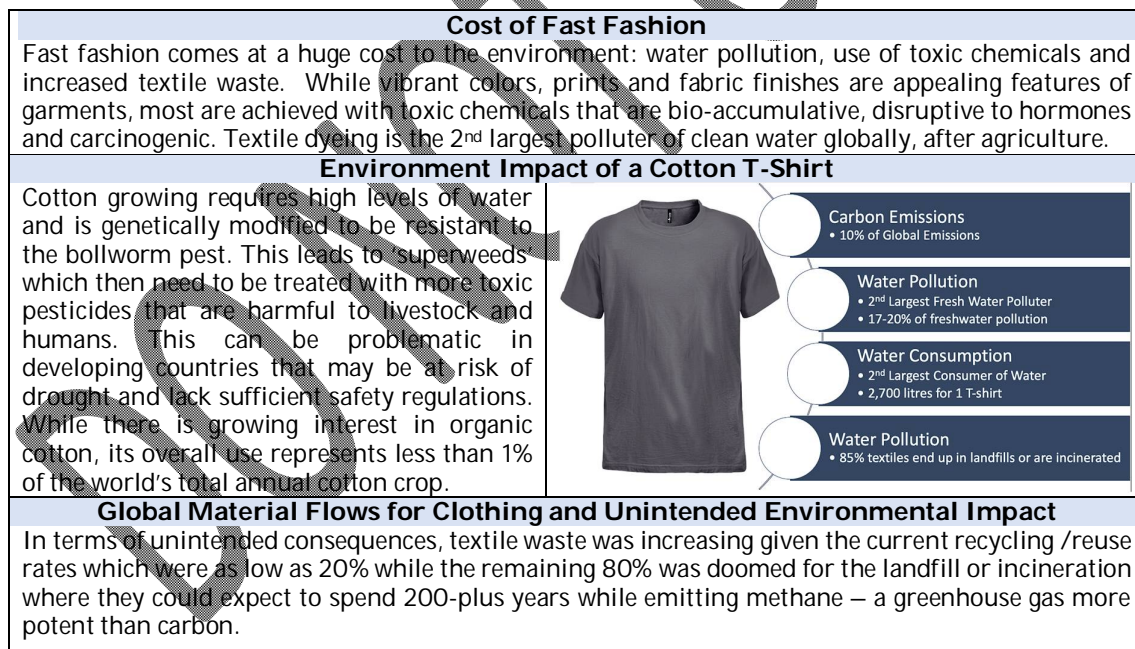
¹⁰³ "Coronavirus Will Force Fashion to A Sustainable Future", op.cit.

very knowledgeable about fashion, its cultural link to craft, tradition, and the importance of heritage. We care about fashion in the context of a changing world.”¹⁰⁴ And with industry stalwarts such as Raza Beig, CEO of Splash Fashion, one of the biggest retailers in the Middle East, believing that, “The greatest part of the future of sustainable fashion is that more and more people are excited about it every day,”¹⁰⁵ what could Alshehail do to leverage Sadeem’s ethical approach in the region’s burgeoning sustainable fashion ecosystem?

Opining that “We’ve been placed on this earth and we need to take care of it”, Alshehail wanted to expand her sustainable business in the Kingdom and beyond.¹⁰⁶ But given the high degree of competition from the West, the global reach of international brands and the pertinent challenges of said industry, would Alshehail be able to successfully establish firm roots for Sadeem and expand it beyond the MENA region?

Annexure I

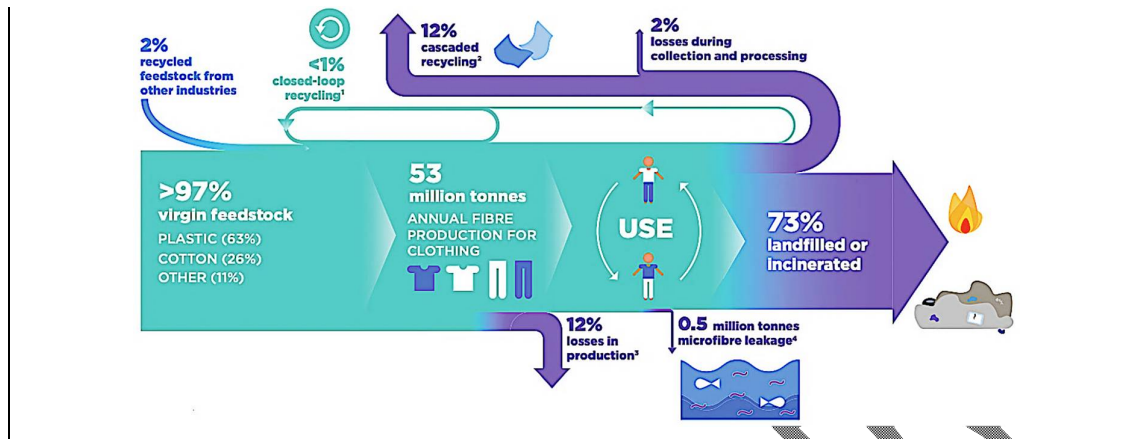
Pollution by the Fashion Industry and Environmental Impact



¹⁰⁴ Tashkandi, Hala, “A stitch in right direction: Saudi Arabia opens new chapter for fashion industry”, <https://www.arabnews.com/node/1579186/saudi-arabia>, November 5th, 2019

¹⁰⁵ Kavalier, Tara, “Eco-Friendly Fashion Trending in the UAE”, <https://themedialine.org/news/eco-friendly-fashion-trending-in-the-uae/>, March 19th, 2019

¹⁰⁶ “Making Luxury Ethical”, op.cit.



Compiled by the Author from the following sources:

- 1) Perry, Patsy, "The environmental costs of fast fashion", <https://phys.org/news/2018-01-environmental-fast-fashion.html>, January 3rd, 2018
- 2) "Stylish killers. The fashion industry as the second largest planet polluter", <https://www.iamrenew.com/environment/stylish-killers-fashion-industry-second-largest-planet-polluter/>, May 1st, 2018
- 3) McCarthy, Allison, "Are Our Clothes Doomed for the Landfill?", <https://remake.world/stories/news/are-our-clothes-doomed-for-the-landfill/>, March 22nd, 2018
- 4) "Make Fashion Circular: Report", <https://www.ellenmacarthurfoundation.org/our-work/activities/make-fashion-circular/report>

Annexure II

Crucial Themes for the Fashion Industry in 2020

Pre- COVID-19 ¹⁰⁷				
Global Economy		Consumer Shifts		
On high alert	Beyond China	Next-generation social	In the neighborhood	Sustainability first
Turmoil could disrupt developed- and emerging-market economies, and indicators of recession risk are spurring companies to build resilience.	Although China provides exciting opportunities, the market can be hard to crack; companies should consider other high-growth geographies as well.	To maximize return on marketing spend, fashion players need to hone their social-media strategy.	Convenience and immediacy are key, and companies must reduce friction in the customer journey via in-store experience and localized assortments.	Fashion players need to swap platitudes and promotional noise for action on sustainability measures such as energy consumption, pollution, and waste.
Fashion System				
Materials revolution	Inclusive culture	Cross-border challengers	Unconventional conventions	Digital recalibration

¹⁰⁷ First reported in China on December 31st, 2019, coronavirus (COVID-19) was an infectious disease that was declared a Public Health Emergency of International Concern on January 30th, 2020 and, on March 11th, 2020, the World Health Organization declared it as a pandemic.

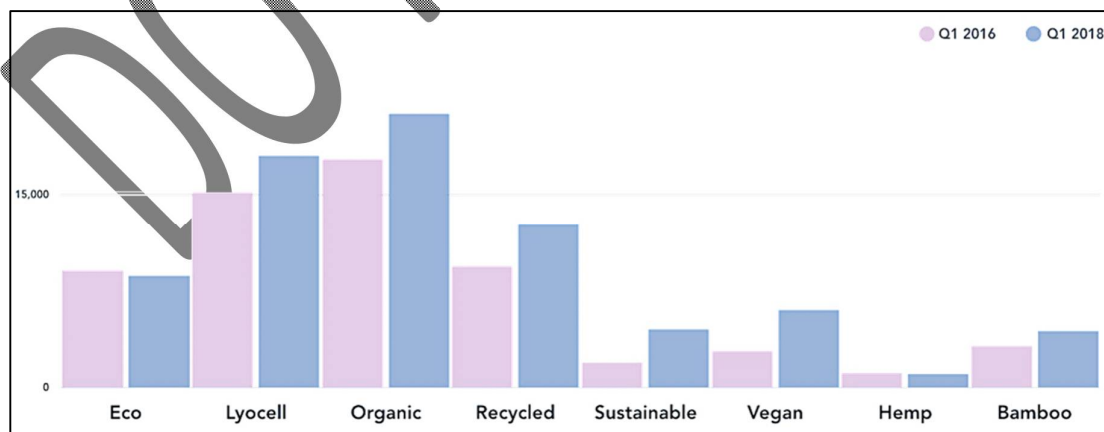
Alternative materials, including sustainable substitutes, may be on their way to adoption at scale.	Consumer and employee pressure will continue the push for fashion players to emphasize diversity and inclusion.	Established players will face competition from Asian challengers, including small and medium-size enterprises selling directly to global consumers.	As direct-to-consumer activity rises, traditional trade shows must adapt.	Although some fashion-tech and digital fashion players have reached unicorn status, concern over their ability to turn a profit is growing.
With/Post- COVID-19				
Global Economy	Consumer Shifts	Fashion System		
Survival instincts	Discount mindset	Digital escalation	Darwinian shakeout	Innovation imperative
Recovery from the pandemic will coincide with a recessionary market, compelling players to ramp up resilience planning and adapt operating models. Companies surviving the crisis will have made bold, rapid interventions to stabilize their core businesses before seeking new markets, strategic opportunities, and pockets of growth.	As deep discounting plagues retailers for the remainder of 2020, a decade-long buildup of bargain-shopping culture will be exacerbated by a rise in anticonsumerism and cash-strapped consumers looking to trade down or turn to off-price channels. Clearance of overstock will be a priority as brands find ways to regain value and rethink their business missions.	Physical distancing has highlighted the importance of digital channels more than ever, and lockdowns have elevated digital as an urgent priority across the entire value chain, but unless companies scale up and strengthen their digital capabilities in the recovery phase of the crisis, they will suffer in the longer term.	The crisis will shake out the weak, embolden the strong, and accelerate the decline of companies that were already struggling before the pandemic, leading to massive waves of consolidation, M&A activity, and insolvency.	To cope with restrictions, mitigate the damaging impact of the pandemic, and adapt to economic and consumer shifts, companies must introduce new tools and strategies across the value chain to improve operational agility, boost productivity, and future-proof business models.

Sources:

- 1) Amed, Imran, et al., "The fashion industry in 2020: Ten top themes from The State of Fashion", <https://www.mckinsey.com/industries/retail/our-insights/the-fashion-industry-in-2020-ten-top-themes-from-the-state-of-fashion>, February 27th, 2020
- 2) Amed, Imran, et al., "It's time to rewire the fashion system: State of Fashion coronavirus update", <https://www.mckinsey.com/industries/retail/our-insights/its-time-to-rewire-the-fashion-system-state-of-fashion-coronavirus-update>, April 7th, 2020

Annexure III

In Stock Numbers of Sustainable Apparel (Q1 2016 vs Q1 2018) (based on number of products available at 52 global retailers each quarter)

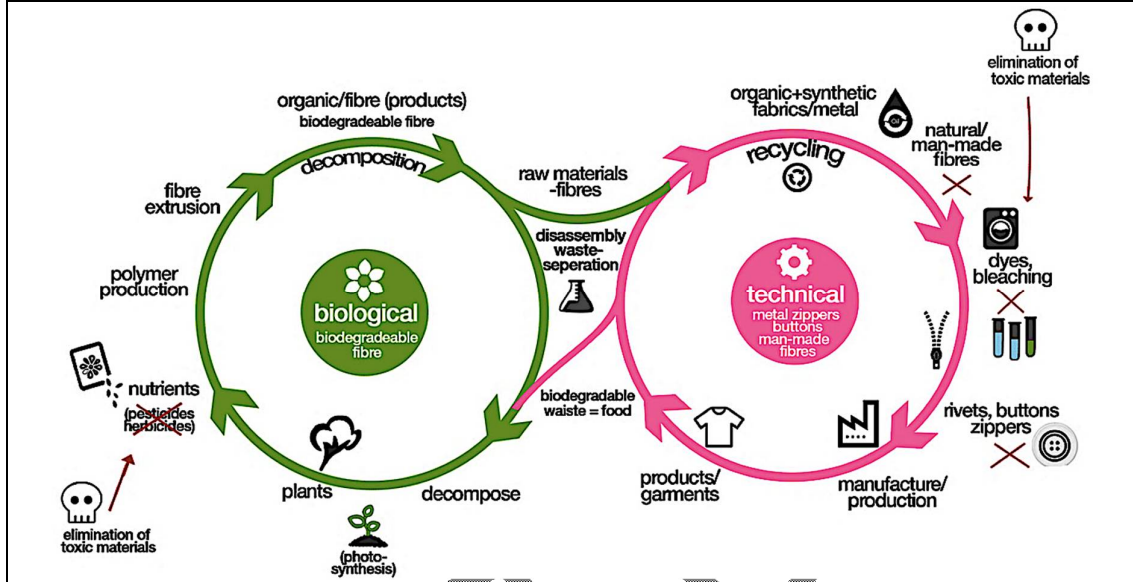


Source: Smith, Katie, "When will the fashion industry take sustainability seriously?", <https://edited.com/resources/fashion-industry-sustainability/>, May 30th, 2018

Annexure IV

Cradle to Cradle Framework of the Garment Industry

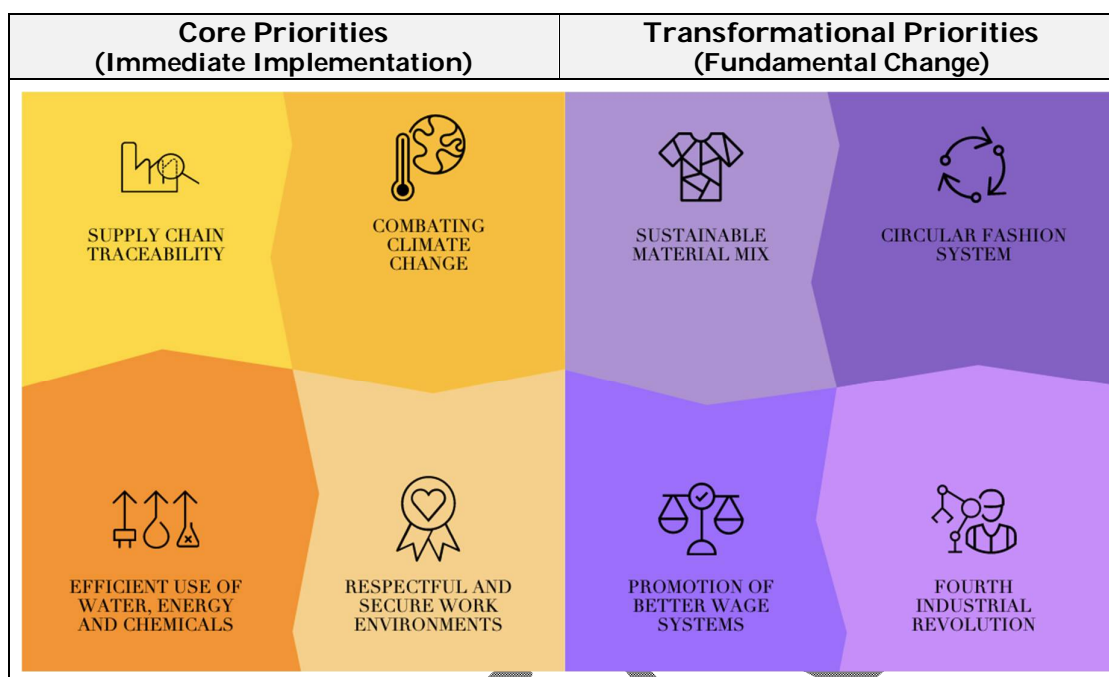
Cradle to Cradle ensures that products remain in a continuous circuit where there is no waste and that the end of the supply chain a closed loop. It starts with the design, by using deliberately chosen materials and encourages companies to take environmental and social factors into account, which are crucial to create value.



Compiled by the Author from the following sources:

- 1) Westerlo, Bas, "Cradle to Cradle in the fashion industry", <http://www.c2c-centre.com/news/cradle-cradle-fashion-industry>, February 20th, 2014
- 2) Kenneth Lyngaas, "Cradle to Cradle Garment Industry", <https://buddhajeans.com/encyclopedia/concept-sustainable/>, June 8th, 2018

Annexure V Eight Sustainability Priorities for the Fashion Industry



Source: "CEO Agenda", <https://globalfashionagenda.com/ceo-agenda-2019/#>, 2019

Annexure VI Arab Fashion Designers who Design for Sustainability

Designer	Label	Country of Origin	Description
Sally Sarieddine	LaLaQueen	Lebanon	Dubai-based Lebanese bag designer created the LaLaQueen hit collection, which showcased contemporary yet timeless designs that are made of ethically sourced leather.
Rawan Maki	Rawan Maki	Bahrain	Environmental engineer Maki is interested in sustainable fashion, its methods, and its applications. She has launched 6 different couture collections, made from recycled materials such as organic cotton, linen glass and coconut buttons.
Sadeem Alshehail	Sadeem	Saudi Arabia	With a strong belief in her ability to inspire people to lead more eco-friendly lifestyles, Saudi designer Sadeem Alshehail has boycotted fabric factories that use chemical dyes and has only been using non-toxic materials in her collections.
Rania Refei and Yara Yassin	Up-Fuse	Egypt	Co-founding their environment-friendly store Up-Fuse together, the two Egyptian designers have been committed to creating and promoting purses, clutches, and backpacks all made from recycled plastic.

Source: Darwish, Riham, "Looking Good for Planet Earth: 4 Arab Designers Making Fashion Sustainable and Stylish", <https://www.albawaba.com/business/looking-good-planet-earth-4-arab-designers-making-fashion-sustainable-and-stylish>, February 17th, 2020