SENTIENT STANDARDS CONSULTING

ANIMAL MATERIALS AND TRANSITION REVIEW

How well do you know your supply chain?

Animal-derived materials (ADMs) can create risks beyond the material itself.
A Sentient Standards Animal Materials and Transition Review examines how ADMs are used and communicated across your collection, helping identify opportunities to strengthen sourcing practices and transition away from virgin animal fibres. Unlike conventional materials assessments focused primarily on environmental impacts, Sentient Standards examines fashion supply chains through an animal welfare and ethical sourcing lens while considering the commercial, environmental and practical implications of transition.

Current consumer landscape[1]:

- 68% of fashion consumers are conscious about animal welfare.
- 27% avoid animal-based fashion, while 1 in 5 would buy more animal-free fashion if they had access to sustainable alternatives.
- 1 in 10 say fashion brand or animal welfare certification claims can't be trusted at face value. Reports of animal cruelty in uncertified and certified textiles supply chains has led to consumers (and brands) finding it difficult to identify high welfare products confidently.
- 50% believe companies should give animal protection equal priority to environmental and social standards within their Corporate Social Responsibility strategy and policies.
- 81% believe that fashion companies should reduce the use of ADMs and invest in alternatives, and transition to sustainable animal-friendly materials.
- 46% of people buy more sustainable products as a way to have less of an impact on the environment[2].
- 80% of consumers are willing to pay 9.7% more for sustainably sourced or produced goods[3].

How are ADMs having a negative impact on the environment and climate?

- 5 billion animals a year are used in textile production. ADMs are not just by-products, but are intrinsically linked to slaughter-based industries.
- Farmed animals account for 44% of anthropogenic methane emissions and 53% of anthropogenic nitrous oxide emissions[4].
- Low-income communities often live near intensive animal farms, and they suffer from pollution of the land, water and air from the farms and vehicles transporting animals to and from the farms which can cause respiratory issues[5] and cancer[6].
- Workers in the supply chain are negatively impacted; slaughterhouse workers can suffer from severe psychological distress[7], while tannery workers can suffer physiological impacts from exposure to toxic chemicals, such as skin irritation and body pain[8].

How does transitioning from virgin ADMs help brands achieve their Environmental Sustainability Goals?

Next-gen materials[9]

- Next-gen materials are environmentally preferred, animal-free direct replacements for conventional ADMs, which are recycled, plant-derived or microbe-derived materials, cultivated animal cells, or a blend of the aforementioned, treated with a range of biomimicry techniques to replicate aesthetics of leather, silk, wool, fur, down and exotic skins.
- $3b has already been invested into next-gen materials, with 145 companies currently working on material development.
- Many big brands such as Stella McCartney, Adidas, Balenciaga and Lululemon Athletica are already using new-gen materials in their clothing lines.

Recycled or reclaimed ADMs

- Repurposing recycled or reclaimed ADMs can reduce the demand for new resources, easing the pressure on the environment and requiring fewer animals to be killed for fibres.
- It can require less processing than virgin animal fibres, saving energy and using less water and chemicals.
- It can reduce incineration and landfill volumes, which benefits the environment and wildlife.

Why review your materials?

- ➔ Reduce reputational risk by identifying animal welfare and sourcing issues before they become concerns for customers, campaigners or other stakeholders.
- ➔ Support credible sustainability & ethical claims with evidence.
- ➔ Stay ahead as expectations around traceability, ethical sourcing and corporate accountability continue to develop.
- ➔ Keep up with big brands which are already incorporating next-gen materials into their collections, such as Stella McCartney, Balenciaga, Lululemon Athletica and Nike.
- ➔ Increase resilience against supply chain disruption as climate change, geopolitical hazards, regulatory changes and commodity competition are increasingly impacting ADM supply[10].

Included in a Animal Materials and Transition Review:

✓ **ADM supply chain mapping** — mapping ADMs across the agreed collection and identifying what is known about their provenance.
✓ **Independent welfare risk analysis** — identifying material- and origin-specific animal welfare risks and assessing the evidence available to address them.
✓ **Supplier evidence & certification review** — assessing what supplier documentation and certification actually demonstrates, and where further evidence is required.
✓ **Traceability gap analysis** — identifying where the brand cannot currently trace or substantiate the origin and conditions of ADMs.
✓ **Claims review** — assessing whether relevant animal welfare, ethical sourcing and materials claims are supported by the available evidence.
✓ **Alternative material research** — identifying appropriate recycled and next-generation materials to virgin ADMs, with consideration of cost, quality, performance and commercial feasibility.
✓ **Transition roadmap** — prioritised recommendations identifying immediate, medium- and longer-term opportunities to reduce reliance on virgin animal-derived materials.

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Interested in understanding your animal-material supply chain and opportunities for transition?

Book a free introductory consultation

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Sources

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