

# EXPLORING SUSTAINABILITY TRENDS IN FASHION INDUSTRY: THE EXPERTS' INSIGHTS OF FASHION PRODUCERS IN TÜRKİYE

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# **Exploring Sustainability Trends in Fashion Industry: The Experts' Insights of Fashion Producers in Türkiye**

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## **Abstract**

This study investigates the latest trends and practices in sustainable fashion in Türkiye. Focusing on the top three fast fashion brands in the country, the study aims at examining how these brands conceptualize and apply sustainable fashion as well as the motivation, prospects and challenges involved in the process. Given the exploratory nature of the study qualitative approach is employed. Data was collected mainly from interviews with sustainability directors in the brands along with industry experts. Latent thematic analysis is utilised for data analysis. Our results show that sustainable fashion is still in its inception stage in the country with top brands still struggling to follow well-defined efficient sustainability concepts, leadership and strategies. In spite of the challenges faced by fashion industry players, promising prospects were highlighted given the increasing awareness and attitudes of young generation. Findings highlight the potential of stakeholder approach, consumer-focused approach, awareness-raising and government support in dealing with various challenges facing sustainable fashion in the country. The study provides useful insights on how to bring about a change not only in the fashion industry but in the society at large by raising awareness of the importance of sustainable lifestyles.

## **Keywords**

*Sustainable fashion, Turkish fashion brands, fast fashion, stakeholder theory*

## Indrodcution

The impact of the the fashion industry on the environment is undeniable. In 2018 fashion industry was responsible for at least 2.1 billion metric tons (4 %) of global greenhouse-gas emissions GHG. While there was a reduction during the pandemic, the level of emission, is expected to be twice the target set by the Paris Agreement for 2030 (Magnus and Granskog, 2020). The fashion industry is ranked second (after the oil industry) in terms of its contribution to pollution (Conca, 2015), and the 4th biggest industry in the world (Vilaça, 2022). All the stages of the industry from producing a garment to ending its life have had harmful effects on the environment (Shen et al., 2017). With about a quarter of the world's chemicals being used in textiles, the industry is the second biggest polluter of natural water in the world (Conca, 2015). High rates of consumption of natural resources, such as water, are a concern in producing textile (Desore and Narula, 2017). Fast fashion trends that were created to meet the high demand for cheap and fast clothing have a substantial impact due to their use of non-biodegradable petroleum-based synthetics clothes (Pucker, 2022). These clothes are often made in developing countries, compromising environmental and social settings and often in unethical work conditions with only one goal to produce more within the shortest timeframe (Wren, 2022).

With such situations, accompanies with rising public awarness, the industry has been under an increasing pressure from policy makers and regulators to adopt more ethical and sustainable measures. Although many definitons of sustainability are in ciruclation, they all share a common vision of sustainability to reflect “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (United Nations General Assembly, 1987: 43). Generally, the fashion industry has been upgrading its strategies to become more compatible with sustainability (Khandual and Pradhan, 2019). This ranges from the use of recycled fibers, reusing water, improving workers' conditions (Khandual and Pradhan, 2019; Shirvanimoghaddam et al., 2020; Hwang and Zhang, 2020). However, evidence shows that despite the pressure on the fashion industry to adhere to sustainable strategies, the industry is still behind in meeting targets. Research shows that sustainability strategies have not been suffienct, or have not been adopted seriously by businesses, demanding that the industry show more comitment (Pucker, 2022).

This paper aims to provide an overview of sustainable fashion in Türkiye from the point of view of fast fashion brands in the country. The paper attempts to provide answers to relevant questions such as how the key brands in the country understand and apply sustainability measures? what kinds of procedures are followed and to what extent? and finally, what are the primary motivations behind going sustainable?

The paper chooses well-known Turkish fast fashion brands as the main source of data. Namely, the brands included in this study are Lc Waikiki, Defacto, and Koton. Combined, these brands have more than 2000 stores. Both for men and women, these brands are found on the top three when it comes to the most preferred fashion brands in the country (Marketing Türkiye, 2023). In addition, two of these brands are listed among the top valuable 100 brands in Türkiye in 2022 (Sağlam, 2022). The list includes another fast fashion brand (Mavi) which was approached to be interviewed but was due to the absence of sustainability department, the interview was canceled. Türkiye was chosen as the context for this study for several reasons. First, the fashion sector is one of the most important contributors to the national economy. The country is ranked as the fourth largest exporter of fashion in the world with a share of 3.3% as of 2020. As for local market, over the last ten years, data shows continuous progress and expansion of the industry in Türkiye, with a turnover from retail stores (by 457%) and households' expenditures on clothing (by 285%) . Second, due to the fact that most research on sustainable fashion has not given enough attention to developing countries (Yang et al., 2017), Türkiye was chosen in a hope to provide inspiration and insights for other similar contexts. Finally, Türkiye was the focus of this research because sustainable fashion has not been sufficiently researched in this country.

The remainder of this paper is designed as follows. Section two provide some literature review that summaries important concepts and theories related to the subject. After the methodology is introduced, data obtained from experts is presented and analyzed. The paper then concludes with a number of valuable impacts and recommendations for main players in this industry.

## **Theoretical Framework**

### ***Sustainability***

The term “sustainability” is a complex concept with about three hundred alternative definitions being attributed to it (Correia, 2019). However, recent literature addresses sustainability in relation to three aspects, namely economic, social, and environmental aspects (Presley and Meade, 2018), which in turn include different principles, approaches, systems, sub-systems, and policies that are related to these three domains (Glavič and Lukman, 2007). United Nations documents consistently explain that sustainable development includes economic development, social development, and environmental protection and that they are highly interdependent (Traer, 2020). The economic dimension focuses on the profit and financial value of the organization including growth and sales and its contribution to the economy. The social dimension addresses the impact of an organization on the community, including the safety and well-being of the workers. The environmental dimension is related to the commitment of an organization to meet ecological concerns and reduce environmental impact by wise usage of resources in a way that safeguards

the interests of future generations (Alhaddi, 2015). This three-dimensional approach of considering sustainability is often referred to as the Triple Bottom Line (TBL) model which has expanded the traditional economically-focused domain of sustainability framework to include the social and environmental dimensions urging organizations to consider the three Ps. This includes, People, Planet and Profit in an effort to apply sustainability that enhances environmental quality and social equity along with economic benefits (Alhaddi, 2015; Correia, 2019).

With sustainability being a priority in global agendas and the industry being a significant source of pollution and damage, this study develops within the discourse surrounding the urgency to go sustainable in fashion (Unal et al., 2020). Sustainability in fashion is mainly discussed in relation to the scarcity of the resources required to produce fabric (Paulina, 2018). However, due to the wide and diverse impact and considering that the harming effects of the industry include all production and consumption stages (Kang et al., 2013), the article adopts the following definition of sustainable fashion: “The variety of means by which a fashion item or behavior could be perceived to be more sustainable, including (but not limited to) environmental, social, slow fashion, reuse, recycling, cruelty-free and anti-consumption and production practices” (Mukendi et al., 2019:2874).

Therefore, some terms, such as ethical fashion, eco-fashion, slow fashion, and green fashion have been used interchangeably with sustainable fashion (Mukendi et al., 2019). Working within the framework of sustainable fashion thus implies that businesses should be conducted in conditions where neither workers nor environment are harmed while also maintaining fair trade principles as well as mindful and ethical consumption.

### ***Fast Fashion***

Fast fashion brands have been the target when addressing sustainability in fashion due to their mass production and cheap products that encourages consumers. Fast fashion is based on the technique of continuous introduction of new models and styles to the customers. The strategy is based on immediate respond to customers' changing moods towards fashion. To achieve this, the strategy seeks low cost and flexible structure (Adıgüzel et al., 2020). Consequently, the idea depends on rapid reactions to different trends which in turns results in higher rates of consumption and waste leading to unsustainable outcomes (Neumann et al., 2020). In addition, the need for cheap production have led to many non-sustainable practices (Presley and Meade, 2018). Low prices often encourage customers to buy more and consequently dispose more (De Angelis et al., 2020). In short, fast fashion promotes a linear model that makes available large quantities of less durable clothes at cheap prices and within a short period of time. These circumstances have put the players of the

fast fashion industry under increasing pressure to quickly and efficiently meet sustainability measures. Therefore, this study develops within an assumption that fast fashion brands in Türkiye, like their international counterparts, have been targeted and informed about sustainable fashion procedure and can be a rich source of research in this regard.

### ***Stakeholders' Theory***

In an effort to thoroughly understand Turkish brands' motivations and strategic orientations towards sustainability, this study develops within the framework of stakeholder's approach. Accordingly, the main goal of any organization is to provide values to all the parties that influence or can be influenced by the business of that organization (Freeman, 1984). Important problems faced by business can be effectively handled if the relation between all parties is taken as the point of the analysis (Parmar et al., 2010). Organizations need to understand that stakeholders share common ends. Thus, a real business value is created when stakeholders value is created as well (Parmar et al., 2010). This could create a contradiction with the traditional view of shareholders' value maximization (Friedman, 2007). based on this understanding, environment is a major stakeholder that is not only affected by the company's activities but also works in the opposite direction decreasing the company's ability to regenerate (Bendheim et al., 1998). Rather than focusing on traditional stakeholders, other groups need to be considered including green and similar interest groups (Freeman, 1984; Lozano et al., 2015). Natural environment is seen as a primary nonsocial stakeholder along with the pressure that comes from secondary stakeholders such as government and social pressure groups (Lozano et al., 2015).

### ***Circular Economy***

Circular economy is a newly emerging concept that is being promoted by the EU and some other governments such as China and Japan (Korhonen et al., 2018). It is defined as "a model of production and consumption, which involves sharing, leasing, reusing, repairing, refurbishing and recycling existing materials and products as long as possible. In this way, the life cycle of products is extended" (European Parliament, 2022). The approach aims to reduce the waste to a minimum and maximize the utilization of the products that contributes to the economic cycle as well the time in which the different resources stay in the cycle (Shirvanimoghaddam et al., 2020). The final outcome will be maximizing value and quality of product value chain and lifecycle (Korhonen et al., 2018).

Two types of circular economy are identified. The first type is mainly about renewing old products via repairs and upgrades. The second type focuses on recycling processes (Stahel, 2016). In the fashion domain, circular economy

targets design plans aiming at: “Reduced utilization of virgin raw materials, efficiency, recycling, reuse, and remanufacturing, new business thinking, avoiding textile waste, slowing down consumption. It also embraces new business strategies which include renting, sharing, swapping, and borrowing, while at the same time increasing sustainable fashion consumption” (Peleg Mizrahi and Tal, 2022:4).

This approach is often referred to as the “cradle to cradle” approach since it departs from the traditional, linear economic model and the one-way flow of materials and energy. Taken into account the ultimate sustainability goals, circular economy as a concept will be a vital lens through which the study approaches sustainable fashion.

### ***Research Methodology***

Since there was an overall lack of research on this topic in the Turkish context, the interviews were designed with an exploratory orientation. The interviews were qualitative, semi-structured interviews employing an interview guide or a framework of questions rather than a specific list of fixed questions (Yin, 2011). Six interviews were conducted with six respondents working in the field of fashion production, sales and marketing. Three of these respondents were the directors of the sustainability department at three key fashion brands in Türkiye. The other three respondents worked in textile companies and are in charge of managing sales with key brands in the Turkish market. The interviews were conducted online using the Zoom software. Five interviews were conducted in Turkish and one interview was in English. In addition to the interviews, the study relied on complementary sources of data, including various ads and campaigns of the brands in questions as well as their annual reports and websites.

Since the interviews followed a list of themes rather than a fixed list of questions there was some flexibility in the manner the interviews occurred. This gave each interview its unique feature. The interviewees had the freedom and space to highlight or elaborate on certain themes more than others. The interviewer made sure all themes were covered or addressed by either asking a direct question; repeating a question that was not sufficiently answered or requesting a clarification on something the interviewee mentioned that was related to one of the themes. Each interview was recorded using two devices then a transcript was made following the “smooth verbatim transcript” method (Mayring, 2014) which made sure that all words were transcribed except for random utterances or filler words such as (oh, you know, umm and the like). These transcribed texts were then translated into English in preparation for the analysis.



Data was analyzed using a latent thematic analysis to identify main themes in the qualitative data as well as “to identify or examine the underlying ideas, assumptions, and conceptualizations – and ideologies – that are theorized as shaping or informing the semantic content of the data” (Braun and Clarke, 2006:84). Therefore, elements such as context, agency, position of the respondent were considered when analyzing the data in an effort to provide a thorough understanding of the situation. The analysis was done manually. The researcher went through the original and translated text several times to find patterns in order to generate categories. Categories were then combined and compared to develop major and subthemes. The themes are highly related and discussing one theme should always be done in relation to the other themes as well as the overall context.

The data revealed a number of findings that are highly related and intertwined. However, for organisation purposes, the themes were grouped into three major themes:

### ***Sustainable Fashion in Türkiye: State Of the Art Current Situations, Understandings and Efforts***

While data reveals that “Turkish brands are definitely starting to go sustainable” (R5), the overall situation of sustainable fashion in Türkiye seems to be in its inception phase with still slow and immature steps being taken and plenty of progress to be made. One respondent explains: “There are investments [of sustainable fashion], but I don’t think it’s enough, we are at the very beginning. [...], there is a lot to do, a lot of work needs to be done” (R3).

This is specially emphasized when Turkish brands compare themselves with international brands: “Europeans are a little bit advanced. Frankly it goes a little slower in Türkiye” (R5).

Overall the data highlights a lack of consistency and clarity in the way sustainability is conceptualized and understood by the brands. This could be attributed to the lack of a leadership and standardized legislations. The brands differ among themselves in the way they understand sustainability as well as the level, approach and degree of adopting sustainability measures and how much importance they assign to sustainability. For example, one brand under this study stands out as a fore-runner in sustainable fashion in Türkiye. The brand has clearly allocated more efforts and funds to sustainable issues. The brand’s commitment is illustrated in providing strategic plans and work, experimental laboratories, sustainability committees, benchmarking, and so on: “For example, we have a laboratory that employs 300 people, so we can do a lot of tests. Now we have started to do environmental waste tests, we have a huge laboratory. Of course, this is an important investment [...]. we did it. I haven’t heard of it in the textile market, you haven’t heard from another Turkish brand” (R1).

While the positionality of respondent (R1), being a representative of the brand, may influence the reliability of the data, other sources of data and available information on the brand's website show positive steps by this brand to be acknowledged compared to other brands studied. In addition, the brand pays attention to the need to control the chemical matters used in both fabric and garment washing processes.

The brand also employs a supplier auditing program which ensures that associated suppliers are applying a certain level of ecological practices that meet certain scores of sustainability standards. However, such control mechanisms do not have a compulsory orientation in the sense that the brand in question keeps working with those suppliers with low scores unlike the case with some other global brands. This reveals that when sustainability control mechanisms exist in the country, they tend to be understood as a tool through which the brands educate the suppliers and encourage them to apply more sustainable practices. In other words, there is little or no liability embedded in sustainable fashion practices in Türkiye and suppliers are not held accountable if they don't meet sustainable standards.

As for the other brands, the common characteristic is focus on the raw materials by using recycled and organic fabric, using BCI cotton, seeking more sustainable raw materials other than conventional ones like cotton, conducting water checks and conducting fabric lifecycle assessment. While not trying to underestimate the importance of the focus on raw materials in the sustainability project, focusing merely on that is not enough if not coupled with other procedures beyond production. Pessôa et al. (2015) believe that fashion companies usually start their sustainability transformation by focusing on raw materials, believing that this will make them look sustainable. In reality, however, excess consumption can cancel the benefits gained from sustainable raw materials. Therefore, the study argues that Turkish brands, if wanting to embark on the sustainable fashion project seriously, they need to realize the importance of addressing all phases and stakeholders involved.

When taking the comprehensive definition of sustainability and the three-bottom line model into account, it seems that the data presents a limited range of environmental sustainability practices. On the other hand, neither economic nor social sustainability seem to be within the standard practices of these brands. Only one respondent mentions social sustainability as a future plan to be considered: "Currently, our works are more focused on the raw material at the moment, and of course, in the future, there will be focus on social side, such as social sustainability" (R2).

This finding is in line with the existing research on sustainability which shows a tendency to be mainly interested in the area of environmental sustainability (Sheth et al., 2011). Sheth et al. (2011) continue to explain that when social

and economic initiatives take place, they are through optional programs under the corporate social responsibility (CSR) banner, which is often not combined with managerial responsibilities and standard business practices.

### ***The Role of Consumer Awareness of Sustainability***

One consistent finding that was emphasised by all respondents in this study is the need to address the customer and the consumption phase as a factor in seeking the sustainable fashion projects in Türkiye. First, all respondents expressed their concern about what they described as a low or underdeveloped knowledge of sustainability among consumers. Respondents agree that the level of Turkish consumer's awareness of sustainable fashions concerns is generally low except for some "shining signs" that come from young generation segments: "I think Turkish customers' consciousness level at the moment, I think, even less than 1 %. We put labels on the products. [...]. We say that these products save this much water or make that much contribution, but really the customers are not very aware of it, there are very few of them who are aware of it" (R3).

In addition, respondents believe that while some consumers may have general knowledge about sustainability, this knowledge is superficial and lacks the functional aspect. Customers may associate sustainability with positive views but when it comes to actual purchasing choices, they have doubts about the quality of a product with a sustainability label: "People see them [recycled products] as garbage or something dirty. In other words, in the research done [name of a brand], for example, nobody wants recycle garment, that is, most people do not want to buy recycle because they act as if a different treatment was done here. They think it's dirty. That is why I believe we should raise awareness about circular economy" (R1). Interviewees concluded that this lack of awareness resulted in weaker demand and smaller market for sustainable items in Türkiye especially when there is a price difference. The majority of research on sustainable fashion provides similar results on how lack of knowledge of consumers affects their purchase intentions towards sustainable fashion products (Maloney et al., 2014; Zheng and Chi, 2014; Cowan and Kinley, 2014; Ko and Jin, 2017; Chi et al., 2021).

Respondents highlight that considering Türkiye as a developing country, the price of sustainable fashion is a concern to the majority of consumers who have other matters to financially attend to than buying a pricier sustainable garment: "In such developing countries consumers unfortunately have to struggle with other issues rather than thinking about sustainable product. So, the priorities in these countries are not about buying a sustainable product rather is about staying alive" (R1).

The data reveals that there is a niche market of sustainable fashion in Türkiye and this market size is relatively small serving a limited number of educated rich elites. Some studies confirm how the smaller volume of the sustainable fashion market compared to fast or traditional fashion is something that sets the two settings of fashion aside (Štefko and Steffek, 2018; McNeill and Snowdon, 2019; Jung and Jin, 2016). Unlike fast fashion which focuses on directing customers to use their products within all times and to follow rapidly changing trends, the integral nature of sustainable fashion is to encourage fashion consumption only when needed (McNeill and Snowdon, 2019).

From the brand's point of view, when consumers buy sustainable products in Türkiye, this purchasing choice is mainly triggered by self-caring concerns, such as one's health, and less by ethical motivation or the care for the environment. For example, several respondents refer to Turkish mothers' keenness on buying organic garments for their children as a healthy option: "Apart from that, mothers, I am a mother, the biggest thing that mothers care is chemicals. Unfortunately, the chemical content is not written on the product, yes, it is ecological and organic cotton, especially for the new born group, it is very important for the baby group because we try to buy organic when we can, even if the prices are different, we try to buy when we afford it" (R5). One respondent also refers to how the sales of organic women underwear significantly increased after the pandemic, explaining that could have been triggered by health concerns.

The study acknowledges the potential bias toward customers taking into account the data is coming from the other side of the equation, namely the brands, that may attempt to refer to the consumer as a scapegoat when the sustainability project is not functioning as it is supposed to be. While initially this study did not intend to focus on the consumer, the current discussion deserves further elaboration. Drawing on Sheth et al. (2011)'s model of customer-focused approach to sustainability, the study finds relevant insights. Seth et al. (2011) discuss how the majority of sustainability approaches fail to directly address the customer, noting that "a weak customer focus seriously restricts both the efficiency and the effectiveness of sustainability efforts" (p. 23). In considering the differences in the way companies respond to stakeholders, the study maintains the importance of placing customer-centric issues at the center of any sustainability project.

### ***Motivation to go Sustainable***

When the motivation of the brands to go sustainable was investigated, several answers were detected. Some echoed a pragmatic perspective claiming that sustainability programs in Türkiye is "mainly about providing better image" for the brand to attract customers as well as catch up with the global trend (R6). One respondent (R5) reflects that the control of chemicals used in the

washing process by a brand was highly advertised in the children's department which highly matches the needs of customers, particularly parents shopping for the best options for their children. (R6) reflects how this practice is driven more by a pragmatic need to sell more in the market than a genuine ethical choice: "Here I can say mainly it is about providing better image not to actually satisfying a customer need." (R4) also attributes the low rate of sustainable collections in stores to the need to achieve a better brand image: "(one Turkish brand) made a collection of 8000-10000 mts, that is, about 6000 products, organic and recycle, this is nothing, this is nothing. This average is 5 pieces per store [...], this is purely for show". This discussion is in line with the research by Wolf (2013) who stresses that companies can be involved in such sustainability-looking manners in order to improve their images and to be seen as a contributor to the society. Research also highlights some other motivations for companies to be involved in ethical or social responsibilities roles, such as the impact of that role on the company's financial performance (Orlitzky et al., 2003; Horváthová, 2010; King and Lenox, 2011), and the impact on business competitiveness (Tan et al., 2015; Wagner et al., 2002).

Coupled with establishing an image is the peer-pressure or pressure from global organizations to follow the global demands on textile industry, including sustainable fashion. Almost all respondents, including the spokesman of the advanced brand, admit that a benchmark towards global brands is being done. As a result, many of Turkish brands are applying some sustainable criteria on their collections or work processes only to follow this trend that has been recently emphasized by different global brands. (R3) states that: "Zara and global brands are doing this sustainable production and so we feel like we are forced to start right now". This statement echoes the obligation or pressure that Turkish brands experience and trigger their practices, especially taken into account an absence of sustainable leadership in the country to set benchmarks. Seth et al. (2011) suggest that businesses are mostly driven by the demand to comply to external pressure rather than genuine strategic internal planning.

One respondent reflects how the pressure is not just external but also coming more from the new generation of the country, triggered by educated choices concerned about the future: "I mean look there are many things that are changing now, especially in regard to new generations. They are now educated [...] Also, they travel [...] So, if the management in these brands are realizing these changes, they may be actually doing this on purpose [...]. I think they are thinking about the future" (R6).

Another respondent further discusses how brands are starting to feel the responsibility to deal with the limited planet resources which could on the long run negatively affect the business:

Because we are consuming the resources, if the resources are depleted If you want to protect the world, even if you think about it by the capitalism system logic, if the resources run out, if you can't sell anything to the end consumer [...]. There will be nothing to do, there will be no production, there will be no sales, or if the cotton productivity drops, if this happens, sources transportation, raw material transportation will end if we do not consume properly (R4)

From the above discussion, it can be inferred that there is a genuine intention to participate in the international efforts to wisely and responsively use the planet resources. These efforts are motivated by the need to save the resources in order to keep the stability of the overall business on the long run. In another words, this view classifies environment as a stakeholder that affects and get affected by the company's action (Bendheim et al., 1998; Linnenluecke and Griffiths, 2013).

### ***Challenges***

The cost of sustainable fashion production was the main challenge highlighted by all respondents. All interviewees as well as documents related to several brands identified the high cost associated with sustainable fashion as a major problem that different brands struggle with. Higher costs of sustainable production, which amount to 10-20% cost difference compared to conventional methods, seems to result in slowing down the process of transition into full sustainable patterns and it is described as the major drive for customer purchasing choices: "So, the most important issue for customer is price. Now we are looking, yes, we can find recycle fabrics, we can find dyes and chemicals that are helpful in terms of reduction of water consumption, but when you look at it, they are more expensive washing and so on, the prices are almost double because their investments are very new and they add the costs of the investments" (R1).

The cost issue of sustainable fashion seems to be present in various studies. Higher cost of sustainable fashion comes mainly from higher cost of raw materials and adhering to fair trade principles (Khandual and Pradhan, 2019), difficulties of mass production due to the extra attention devoted to verification and traceability processes (Moon et al., 2014), or from the limitation of resources (Henninger et al., 2016). This can result in placing sustainable fashion in weaker position compared to cheaper unsustainable fast fashion (Ertekin and Atik, 2020), since more sustainable fashion products may become out of the reach of the mass of consumers (Khandual and Pradhan, 2019; Henninger et al., 2016). Otherwise, companies have to sacrifice their profit margin to stay competitive (Moon et al., 2014). Respondents conclude that due to this situation, brands face a big challenge in the sense that it is not easy to convince customers to pay a premium for this extra production cost. As a result, on the long run, brands may not be able to survive this imbalance. This can be seen

as a burden on the marketing departments who have to come up with strategies that help to communicate the benefits of sustainable products to buyers who may not be fully convinced of the idea of sustainable fashion (Henninger et al., 2016). According to Štefko and Steffek (2018) the cost problem manifest in three main points. First, due to higher costs, long run mark ups will not be easily maintained. Second, the balance between attractiveness and being commercial will be hardly achieved. Third, it may not be easy to justify slow fashion's higher prices to customers.

Another significant challenge facing the transition to sustainable fashion in Türkiye is the lack of government support. Respondents referred to a weak or non-existing support from the government, political parties or social syndicates and association, whose agendas seem to place sustainability goals on the margins. Left alone with little support, brands have to struggle to meet the demands and pressure to go sustainable from international organizations and to do the tasks that are supposed to be carried out by other sides: "Well in Türkiye I think there is no pressure from government or opposition or any other associations because people have more important priorities. Mainly they are worried about filling their somehow basic needs" (R6).

As a result, these kinds of extra tasks can create extra burden and cause a major challenge on the long run: "I mean now in Türkiye governments from different parties, this [sustainability] is far from being a priority for them. so, when different governments are not supporting this issue, we will have obstacles and challenges" (R6).

Respondent (R6) continues to explain how this lack of support is due lack of awareness of what sustainability measures really function:

For example, now Türkiye is banning to import recycle fibers because they see it as garbage. They are afraid that other countries are dumping their garbage in our country. So now fabric mills have shortage in recycle fibers because there is no enough governmental support. This is a big challenge. It is all connected to awareness if you can see. Awareness of government people, society politicians and so on. This is our biggest challenge I think (R6).

Indeed, the problem of banning the import of different recycle seems to be negatively affecting different players in this industry (Sismek, 2021). The data collected from the interviewees indicates that social and political pressure in Türkiye regarding sustainability is not sufficient to provide a real pressing power on companies to comply with related standards. Thus, it can be argued that this lack of support as well as lack of accountability from the government represents an absence of sustainability leadership in the country. Adopting the multidimensional Sustainable Leadership SL model, Suriyankietkaew and Avery (2016) propose that SL suggests "a holistic approach to leading

an organization with the aims of balancing people, profits, and the planet, and promoting longevity of the firm through evidence-based management practices” (p.4). The government’s role in sustainable fashion is undeniable and becomes very critical in supporting transition towards sustainable fashion set ups. This includes, for example, subsidizing and sponsoring green companies (Niu et al., 2017; Choi and Luo, 2019; Mizrachi and Tal, 2022), supporting high technologies in the sector (Mizrachi and Tal, 2022), providing credibility to fashion companies towards their customers by certification and pushing for transparency (Mizrachi and Tal, 2022; Cho and Lee, 2013), promoting green consumption through sustainable procurement and supporting green education (Boström and Micheletti, 2016; Cheramie, 2018).

Another major challenge that was identified in the data was the problems affecting supply chain. The effect of supply chain related issues cannot be ignored. Some examples include logistic problems, supply chain breaking down, shortage and long lead times. These concerns are not specific to Turkish brands and may result in pushing brands to ignore some sustainability standards and stick to more flexible and easy solutions: “We saw that chain breakdown, even if it was Inditex, you know the last thing, to be included in JOIN LIFE label you had to have certain criteria such as organic or recycle or Tencel. After that, they said, it doesn’t work because there is a price and lead time issue so they said You can have BCI cotton instead” (R6). These problems are not specific to fashion or sustainable fashion domains as these kinds of problems are currently affecting several other industrial domains worldwide. Although these problems are common in other domains, there are few factors that make supply chain issues deserve more attention in the realm of sustainable fashion. These issues include, high resources use, high competition, and the need to make manufacturing in location with lower sustainability standards (de Brito, 2008). Supplier delays are identified as the most significant risk that can face fashion brands in supply chain area (Hsu et al., 2021). What makes the issue even more challenging is that, commonly, brands try to take advantage of low cost of manufacturing by using suppliers that are located in several less developed countries (Turker and Altuntas, 2014). So, other than potential delays, the challenge is even more considering the need to coordinate these different locations (Fung et al., 2019), or the risk of losing control of some sustainability standards (Henninger et al., 2016) resulting in difficulties in conveying the sustainability standards along the whole supply chain (Todeschini et al., 2017).

### ***Prospects***

Despite the many challenges facing sustainability goals in Türkiye, data reveals an overall optimism about the future. All respondents shared a common positive outlook toward the near future highlighting that sustainability measures will soon become a necessity and norm in the fashion industry in the country. One



respondent (R5) explains that given that only 10% of current store products can be characterized as sustainable, there exists an estimation of this rate to reach 40% in the near future as Türkiye will witness a “huge increase” in the coming five years. This increase will become a sort of obligation rather than a responsibility following the footsteps of other international fashion brands such as H&M and Inditex. This optimism may be attributed to several reasons. For example, it is estimated that there will be different types of increases in sustainable fashion consumption not only in the sense of using more sustainable materials but also in transforming the overall business model into circular one to include settings such as resale, rental, repair, and refurbishment. Generally, there are a number of factors that explain and support the claim about such a rise in the future worldwide. First, an increasing demand from consumer side will end any optional terms for fashion business models. Moreover, the emotional setting that distinguishes fashion industry will probably result in shaping the direction of customers' loyalty towards more sustainable brands as research shows that brands that are perceived as ethical in the minds of their consumers are expected to have more gains in terms of their consumers' trust and loyalty (Singh et al., 2012). In the Turkish context, most of these reasons apply. However, one aspect that was prominent in the data was the prospect of increasing awareness of the young generations of sustainability issues due to education and awareness-raising opportunities: “The new generation is very conscious about this subject, because they research this subject more, they are more conscious and they buy the products and they are aware of them” (R5). Young generations will be the main tool that will change the face of this industry with a continuous growing size of Z generation. Thus, and as consumers' awareness is shifted towards more sustainable approach regarding their fashion consumption (Khandual and Pradhan, 2019), companies find themselves motivated to make more investments in the related fields (Todeschini et al., 2017).

In addition, respondents expect that the higher cost associated with sustainable fashion production will gradually decrease until it becomes equal to conventional production. As R6 advises, this is because higher expected production volume which will automatically result in reducing unit cost. In addition, it is expected that people will gradually earn more experience and will be able to maintain lower production costs. By this, price problems can be solved, and sustainable products may be offered in the same price in the future. While learning curve model can give validation to the argument that an accumulated experience can lead to better productivity and efficiency (Arrow, 1962 in Nemet, 2006), few concerns may come around regarding increase of production as this approach will lead to revised outcomes when sustainability goals are concerned (Atikt, 2013; Henninger et al., 2016; Ertekin and Atik, 2020).

Based on these optimistic future projections, respondents were able to identify important opportunities that can be gained by Turkish brands. Namely, as this matter is still in its early stage, brands can enjoy a first mover advantage in the sense that they can be ahead when the time comes in which the pattern of sustainability consumption turns into more regular one. In another words, interviewees agreed that the change is coming and that winners are the ones who are well prepared.

There are actual needs. So even now if consumers and governments are not aware. But when real problems come up, they will be aware and here the winners are the ones who have prepared for this issue before. So, I see it as a strategical investment. And the real opportunity is that not so many are investing there so brands have a chance to have a first mover advantage you know. They will have also the know-how and they will be always ahead of the brands that they didn't act or believe in this issue. (R6)

Indeed, these early moves can be helpful in boosting sales volume (Li and Zhao, 2019), create and capture value and achieve a sustained competitive advantage (Rahman and Bhattacharyya, 2003), and reducing costs (Tetrault Sirsly and Lamertz, 2007).

In addition, another strategic opportunity, specific to the current context, was also generated from the analysis. Türkiye seems to have two important strategic advantages: First, the country has great value in terms for resource, such as the land and the raw materials, such as hemp. Second, Türkiye is known for its skilled workforce with expertise in fashion. These two important advantages need to be carefully analyzed by brands as this can be a great opportunity to turn Türkiye into a strategic location in terms of sustainable fashion: "I think Türkiye is a very valuable tool in terms of using the land and using the resources. For two reasons, the country is very important for a sustainable resource management. We are able to provide this resource management, we have both resources and actually information power" (R4).

The power of human labor in Türkiye is significant. The expertise that people have gained through the past years can be critical in creating the proper environment for technological innovation. Technological innovation is key in sustainable fashion in areas such as achieving better clothes durability, decreasing water consumption, boosting effective use of synthetic fibres to replace natural ones (Todeschini et al., 2017), cost reduction (Nayak, 2019), improving ability to produce natural garments, and improving recycle techniques (Binet et al., 2019).

## **Conclusion and Implications**

The current study attempted at providing an investigation of the situation of sustainable fashion in Türkiye by analyzing data from key Turkish fast fashion

brands. The findings revealed that sustainability in fashion in the country is still going through an emerging phase with a notable lack of well-defined conceptualizations, efficient leadership and strategic orientations. Despite some positive examples of proactive sustainable procedures, these procedures are limited, uncomprehensive and are not accompanied by strict liability policies. The study highlighted the potential role of education and awareness-raising campaigns in making the sustainable fashion project more successful by including all stakeholders.

Considering Türkiye as a thriving textile business center, the findings of this study can have several implications for fashion managers, marketers, government and non-governmental policy-makers working in the realm of fashion. With the country gradually transitioning to sustainable fashion, sustainability must be viewed as an imperative and not a choice. A stakeholder approach can be utilized stressing equal partnership and cooperation. The decision makers in Turkish fashion brands must perceive sustainability as a major stakeholder that affects and is affected by their business activities. For proactive sustainability projects, a genuine commitment to sustainability and what it stands for is recommended. Sustainability needs to be perceived as a goal itself rather than a tool to achieve some commercial ends. There is also an urgent need to address the three dimensions of sustainability in the strategic planning of business and not just the environmental aspect. Due to the current lack of active sustainable fashion leadership at the government level, brands can benefit from establishing a sustainability leadership in the form of an association that could work as a platform for consultation and guidance. This association can act as a body to develop standardized conceptualizations, definitions, policies and target. Any sustainability policy must start by standardizing concepts and criteria for what sustainable fashion is all about. Benchmarking and liability standards should be taken seriously in order for sustainability targets to be met. Sustainability management is needed to be established within companies in order to ensure that sustainability goals and targets are being strategically designed and followed.

The findings of the study have implication for investing more efforts in the customer as a vital part in the sustainable fashion project. It is recommended that consumers should be included in any discussion about sustainable fashion. Our findings have highlighted how brands blamed the customer's lack of knowledge for the ineffectiveness of sustainable fashion. Brands need to acknowledge that "when it comes to fashion, it is simply not possible to promote a circular economy without the thoughtful integration of consumers" (Peleg Mizrahi and Tal, 2022:8). Focusing only on investing in new ways and technologies to make fashion greener and more sustainable remains incomplete if not coupled with placing the consumers and their choices and consumption practices as a vital part of the circular economy equation. As

a result, Turkish brands are recommended to allocate their efforts to invest in increasing consumers' knowledge and awareness about what constitute sustainable fashion practices. Some suggested tools can be the ones that focus on a combination of education and marketing programs. This can be done via the various platforms of social media. It can also be carried via in-store campaigns by for example designating a separate section or corner in stores that display sustainability issues using attracting designs and content. This can invite customers to read and ask questions. Here, the role of educated store sales persons is critical and these individuals should be trained in advance. One way that has been recently used in the market with positive prospect is the use of a tag attached to a garment that can be scanned by customers revealing all the details related to sustainability. From my experience as a manager in the field, this innovative method could contribute to educating the customers about sustainability. Such education initiatives that invite the consumers to learn and reconsider their choices can lead to a "significant change in the fashion industry, a change which will be no less powerful and even more meaningful than top-down changes led by decision makers" (Peleg Mizrahi and Tal:23).

Finally, with regard to cost problem, companies can consider different cost reduction techniques and strategies that can help them to improve this imbalance. Examples include, reconsidering design modular strategies (Gwilt, 2013), using hybrid approaches and optimal solutions to help reach the best economic combination of sustainable raw materials (Adriyendi and Melia, 2021), integrating sustainable practices within the whole business model of the organization (Nayak, 2019), the use of energy efficient technologies (Nayak, 2019), adapting a collaborative approach among fashion organizations (Puspita and Chae, 2021). As we believe that such tools may provide some help in reducing the gap between traditional and sustainable methods, we think also that they may not be able provide an optimal solution. We believe that the key word in this regard is wise and brave investment. The mentality of these investments should be circulated within circular economy framework. Cost reduction should not be the ultimate goal of these investments, rather it should be to achieve maximum efficiency and effectiveness while tracking sustainability goals.

### **Limitations and Future Research**

The research acknowledges the shortcomings of some methods and procedures. For example, the interviews were conducted online which may have decreased the advantages that may come out from direct social interaction and communication. In addition, the translation process that occurred from Turkish to English may have limited the ability of capturing some underlying meanings. Moreover, Generalizing the results of this research may have been limited by the qualitative nature of the method. Therefore, future research can combine some qualitative techniques as well. Content wise, future research

can investigate the perception and practices of Turkish consumers in order to have more thorough understanding of sustainable fashion in the country. Also, it could be useful to investigate the role of suppliers in sustainable fashion at the production level.

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