

The 2018 Ethical Fashion Report

THE TRUTH BEHIND THE BARCODE

tearfund



**BAPTIST
WORLD AID
AUSTRALIA**

Be love. End poverty.

THE 2018 ETHICAL FASHION REPORT

THE TRUTH BEHIND THE BARCODE

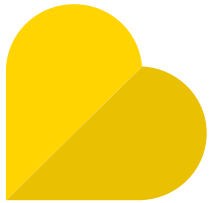
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Behind the Barcode is a project of Baptist World Aid Australia.

New Zealand headquartered companies researched in partnership with TearFund New Zealand.

www.behindthebarcode.org.au



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Report Design

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1 Executive Summary

This section outlines the research aims and scope, data collection and findings and overall results of all companies.

EXECUTIVE SUMMARY

OVERVIEW

the rights of workers. These rights include the right to a safe work place, a living wage, and the freedom from forced and child labour.

Since its first edition in 2013, The Report has continued to grow in scope. This year, it grades the practices of 114 companies (from A-F), assessing the strength of those systems to mitigate the risk

of child labour, forced labour, and exploitation. Excitingly, in addition to its traditional focus on labour rights, The 2018 Report also includes preliminary data on the global fashion industry's environmental performance. 77% of assessed companies actively engaged in the research process.

These 114 companies represent 407 brands. To check brand grades, go to the brand index on page 55 or the online fast finder at www.behindthebarcode.org.au

Overall Grades: O-Z

| OVERALL GRADE | A+ | D | A | F | C | B- | B | D+ | C+ | B+ | D- | B | A- | B- | C- | D+ | C+ | C+ | F | B | D+ | C- | C | D | C | F | D+ | B | F | F | C+ | | | | | |
|--------------------------|----|---|---|---|---|----|---|----|----|----|----|---|----|----|----|----|----|----|---|---|----|----|---|---|---|---|----|---|---|---|----|--|--|--|--|--|
| Outland Denim | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Oxford | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Patagonia | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pavement United Brands* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Postie+ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Puma | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| PVH Corp* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| R.M. Williams | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Ralph Lauren* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Retail Apparel Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Rip Curl | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Rodd & Gunn | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Roger David | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RREPP | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Seafolly | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Seed Heritage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Simon de Winter Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Specialty Fashion Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sussan Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| T&T* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Target Australia | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| THE ICONIC* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| The PAS Group | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| The Warehouse Group* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tigerlily* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Tree of Life | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Trelise Cooper* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| UNIQLO* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| VF Corp | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Voyager Distributing Co* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wish Designs* | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Zimmermann | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

* = non-responsive companies



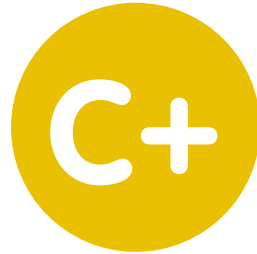
Workers at a Hung Yen-based garment factory in Vietnam.

EXECUTIVE SUMMARY

INDUSTRY OVERVIEW



companies assessed



median grade

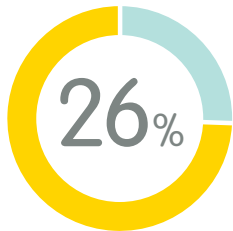


companies received
A range grades

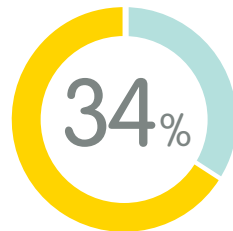


companies received
F grades

2017



2018



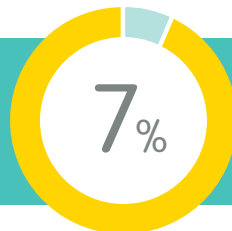
While transparency remains a challenge in the industry, we celebrate the continued improvements here. The percentage of companies publishing full direct supplier lists has increased from 26% to 34% in the last year alone.



© ILO/Aaron Santos, via: <https://flic.kr/p/hJVRDu>

For the first time, we have assessed companies on their gender policies and strategies. Only 22% of companies had both a policy and strategy to address gender inequality and discrimination in their supply chain.

Tracing of raw materials remains a significant challenge, with just 7% of companies knowing where all their raw materials, such as cotton, are coming from.



Worker Empowerment remains the area where the most work still needs to be done. The median grade for that section of our assessment is D-.

EXECUTIVE SUMMARY

INDUSTRY PROGRESS

Baptist World Aid Australia's first report on the fashion industry was published in 2013; since then, we have seen the industry make significant progress in the quality of their labour rights management systems.

We've seen a significant increase in company responsiveness to the Ethical Fashion Report's research since 2013:



In 2013, just one sixth of companies that were assessed were publishing supplier lists – in the 2018 Report, the proportion is one third.

The scope of our research has expanded significantly:



Traceability reaching deeper into the supply chain of companies has increased over the last five years:



The percentage of companies tracking the presence of democratically elected unions and collective bargaining agreements in their final stage factories has had significant improvement since 2013.



EXECUTIVE SUMMARY

WHO MAKES OUR CLOTHES?

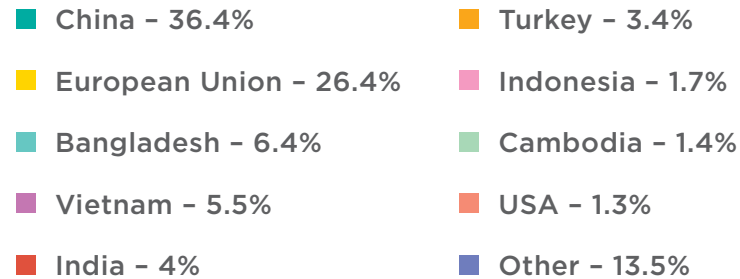
Who Makes our Clothes?

Increasingly, the world's population is clothed by workers in the Asia-Pacific. Across the region, in low and middle-income countries, 43 million people work in factories to produce garments, textiles, and footwear.¹ India constitutes the biggest share of these workers at 16.7 million, followed by China (6.2 million), and Bangladesh (4.9 million).²

However, despite the quantity of workers in India, it is still China (with 37.2% of the market) that commands the largest share of global clothing exports. Bangladesh, Vietnam, and India are the next largest exporters in the region, with 6.3%, 6.4%, and 5.5% of global market share respectively.⁴ China's lower quantity of workers, relative to its volume of exports, is partly explained by the low availability of data outside urban production hubs and partly explained by the country's higher rates of productivity.

The pattern of production has also been shifting in recent years. Promisingly, in China, wage growth has been averaging about 9.1% a year. This has had beneficial impacts for workers; but at the same time, has caused many companies to relocate production to lower-cost markets. Bangladesh, Vietnam, and Cambodia have seen the largest increase in garment exports as a result (each growing by between 5% and 6% per year).

SHARE OF GLOBAL CLOTHING EXPORTS



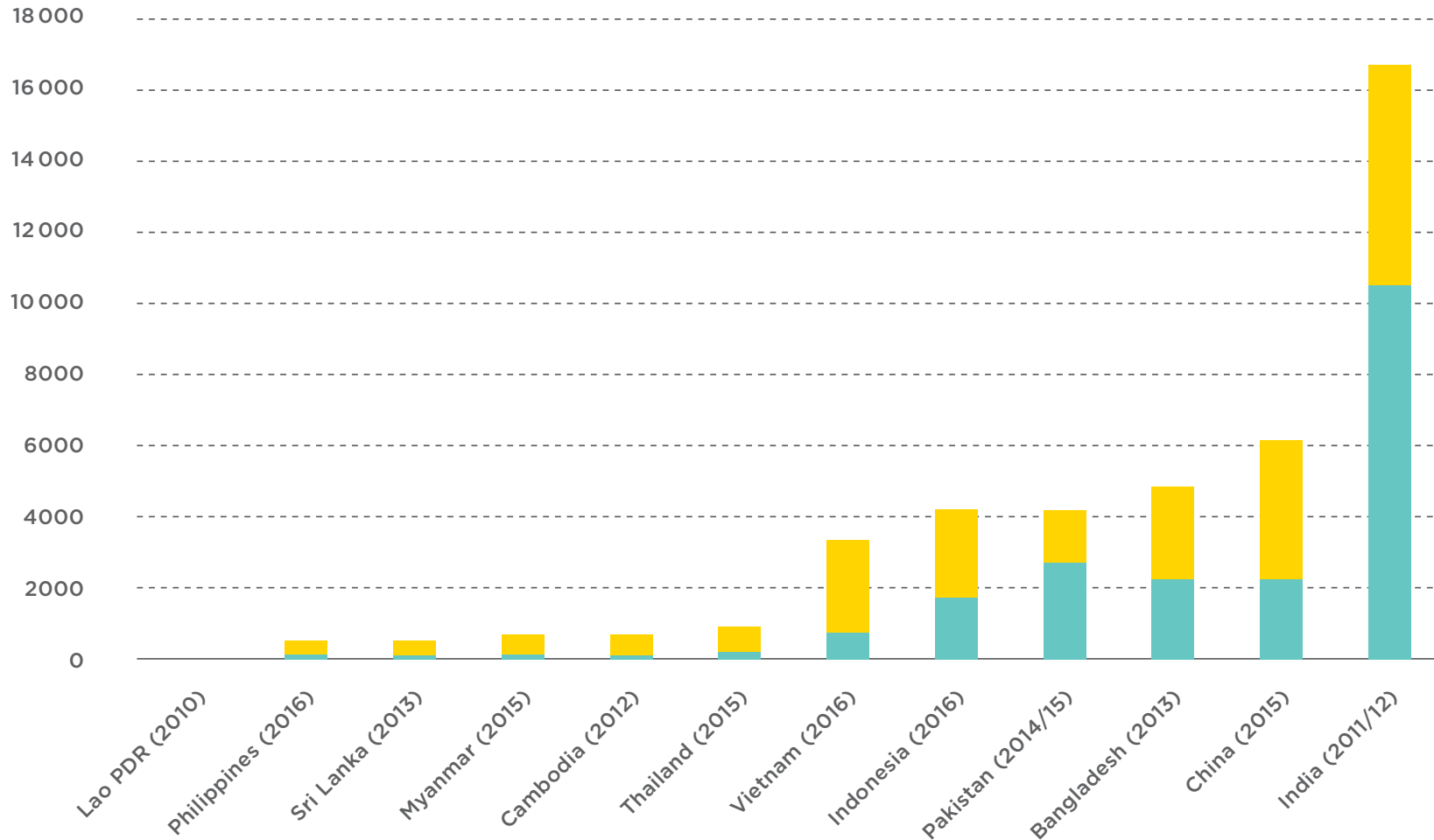
Source: World Trade Organisation

EXECUTIVE SUMMARY

WHO MAKES OUR CLOTHES?

EMPLOYMENT IN THE GARMENT, TEXTILES AND FOOTWEAR INDUSTRY *

NUMBER OF WORKERS



MALE FEMALE

* = latest year available³

Source: International Labor Organisation

EXECUTIVE SUMMARY

INDUSTRY CONCERNS

Concerns for Worker Rights

For the 43 million workers of the Asia-Pacific, and for millions of others across the world, the global fashion industry is a significant provider of jobs. It also spurs economic growth, generates tax revenue, provides valuable skills and training, and delivers crucial foreign exchange. All of these factors can, and often do, contribute to improving the lives of these workers and their communities.

At the same time however, the global fashion industry can be a place of exploitation for millions.

For the majority of workers in the global fashion industry, wages are so low that they leave them, and their families, trapped in poverty. Beyond this, fashion production throughout the Asia-Pacific is marred by the presence of slavery, and problems of child labour remain persistent.

Though safety standards are improving (particularly in Bangladesh), fire safety, structural defects in factories, and unsafe working conditions have not yet been adequately addressed.

Forced Labour in the Fashion Industry

Fashion is a high-risk industry for forced labour. The International Labour Organisation (ILO) and Walk Free estimate that there are 24.9 million forced labourers in the world, with 60% of them being exploited by private enterprise. Two thirds of forced labour victims are in the same region where the majority of the world's garment production takes place: the Asia-Pacific.⁵

The risk occurs at multiple points of the supply chain — with manufacturing accounting for about 15% of forced labourers, while agriculture accounts for a further 11%.⁶ Women, who make up the largest proportion of garment producers, are also more vulnerable, accounting for 57.6% of all forced labourers.

According to risk analytics released by Verisk Maplecroft, most of the world's largest garment exporters — such as China, Bangladesh, India, Vietnam, and Cambodia — are all rated “high” or “extreme” on the risk of forced labour.⁷

Child Labour in the Fashion Industry

Child labour, particularly in the production of raw materials like cotton, is prevalent in fashion supply chains.

The ILO reports that there are 152 million child labourers in the world. The majority, 71% (108 million), can be found in the agricultural sector.

Cotton production carries an especially high risk of child labour, with almost every major cotton-producing country being impacted. These include China, India, Brazil, Pakistan, Turkey, Uzbekistan, Turkmenistan, and the United States.⁸ Cotton from Turkmenistan is of particular concern, with child labour and forced labour being widespread and state sponsored.⁹ Among the large cotton producing nations, Australia is one of only a few exceptions to this trend.

The risk of child labour in manufacturing is also significant, with the ILO estimating 18 million victims may exist.¹⁰

The United States Department of Labor reports that child labour is used in garment, textile, and footwear manufacturing in countries across the Asia-Pacific. These include China, India, Bangladesh, Malaysia, Vietnam, Indonesia, Cambodia, and Pakistan.¹¹



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EXECUTIVE SUMMARY

KEY FINDINGS

Key Findings

Effective labour rights management systems are critical to addressing the risks outlined above. It is now widely accepted that a significant share of the responsibility rests with companies themselves. In many instances, companies have pursued lower costs by moving production to regions with poorer industrial relations systems and lower institutional capacity.

Since the first campaigns against sweatshops in the mid-90s, companies have increasingly recognised that they cannot outsource responsibility to third parties; that they themselves must exercise adequate due diligence to address risk. Global frameworks, such as the United Nations Guiding Principles on Business and Human Rights, and the Sustainable Development Goals support this understanding.

Company Performance

A small cohort of companies in The Report were found to have exceptional labour rights management systems — including *Outland Denim*, *Common Good*, *Icebreaker*, *Freeset*, *Etiko*, and the *Mighty Good Group*. Each of these companies receive an A+. They knew their supply chains from farm to factory and had intentionally invested in developing quality relationships with their suppliers. In most instances, these companies were transparent about who their suppliers are. They were also able to demonstrate that workers had an avenue to collectively agitate for their rights and that living wages are being paid in at least the

final stage of manufacturing. Beyond this, *Outland Denim*, *Common Good*, and *Etiko* were able to demonstrate that living wages are also being paid at their input suppliers.

Cotton On Group has demonstrated continuous improvement since the first edition of The Report. It is now the best rated, large multinational headquartered in Australia. This year, *Cotton On Group* receives an A grade, with its progress driven by several factors.

For the past three years, *Cotton On Group* has been committed to tracing deeper into the supply chain, all the way to raw materials. It can now trace between 50% and 70% of its raw materials, sourcing much of its cotton through a combination of the Better Cotton Initiative and its in-house “Kwale Cotton Program” (this program is further highlighted on page 43 of The Report). *Cotton On* has also become increasingly transparent about its suppliers and has invested substantial resource in supplier training.

Similarly, *APG and Co* and *Country Road Group* have each invested substantially in their systems. They too can demonstrate year on year improvement.

APG and Co's work towards developing long-lasting and quality relationships with suppliers, along with its efforts to ensure that workers can unionise, cooperate, and bargain collectively is commendable.

Country Road Group has demonstrated increasing knowledge of its suppliers (back to its raw

materials) and, like *APG and Co*, has invested in developing long-term supplier relationships. Both companies receive an A- grade.

Outdoor fashion companies, as a subset of the broader global fashion industry, continue to shine. *Icebreaker*, being the best graded amongst its peers, receives an A+ grade. Both *Patagonia* and *Kathmandu* receive A grades.

Conversely, several companies have received F grades in consecutive editions of The Report. These are *Ally Fashion*, *Bloch*, *Decjuba*, *Wish* and *Voyager Distributing* (brands include *Ping Pong* and *Kachel*).

In most instances, the F grade has been awarded because companies have little or no publicly available information to assess their systems and, additionally, chose not to engage with The Report's research process.

Without transparency, it is almost impossible for consumers to trust that these companies have sufficient systems to ensure that the rights of workers are being upheld. The F Grade is not an assertion that these brands necessarily have poor labour rights management systems, but merely that their labour rights management systems are not sufficiently visible for assessment.

Supplier Knowledge

Supplier knowledge is a key pillar of a strong labour rights management system. If companies don't know (or don't care) who their suppliers are, then there's virtually no way of ensuring

EXECUTIVE SUMMARY

KEY FINDINGS

that the workers who make their products aren't being exploited. It is encouraging then, that this continues to be one of the most significant areas of improvement for the industry.

This year, The Report found that more than 82% of companies knew more than three quarters of their final stage manufacturing suppliers (first tier). For the majority of companies, it is at this stage of the supply chain that they have the strongest relationships and most control. Thanks to this strong visibility, the worst forms of exploitation, forced labour and child labour, are now far less prevalent in the actual manufacturing of garments (though are still present in many cases).

However, deeper into the supply chain, where there is far less visibility, the risks remain substantial. Encouragingly, more and more companies are identifying their suppliers beyond the first tier. In fact, The Report found that 78% of companies are now actively tracing their fabric suppliers (second tier); this is up from 49% in 2013. 37% of companies now know more than 75% of their second-tier suppliers, up from 24% in 2013.

But one of the most exciting areas of improvement is in supplier knowledge of raw materials (third tier, usually cotton farms). This improved knowledge has, in most cases, been coupled with improved systems to address exploitation.

When Baptist World Aid Australia began this research in 2013, most companies argued that tracing back to the farm was outside their scope of control and responsibility. At the time,

raw materials tracing was largely restricted to Fairtrade companies. Now 42% of companies are seeking to trace their cotton suppliers, with many collaborating through the Better Cotton Initiative (BCI) to do so.

BCI is a multi-stakeholder initiative that works with brands, NGOs, farms, and cotton-traders to improve social and environmental protections and increase farm yields.

All Fairtrade companies excel at cotton-tracing and ensuring that robust systems are in place to protect workers in their cotton fields. This cohort includes *RREPP, Etiko, Mighty Good Group, Freeset, Common Good, and Kowtow Clothing*.

Amongst non-Fairtrade companies, *Cotton On Group, adidas, and Country Road Group* show yearly increases in their use of traceable cotton. *adidas* is currently using 60% BCI cotton and has planned to increase this amount to 100% by the end of the year.

Kathmandu remains a stand out performer when it comes to tracing raw materials. By using a combination of BCI and Fairtrade cotton, *Kathmandu* has traced three quarters of its cotton supply and, through The Responsible Down Standard*, has traced 100% of its down supply.

Transparency

One of the most notable positive trends for the global fashion industry has been the improved corporate transparency around supply chain practices. Transparency demonstrates a company's

Companies that have begun publishing their supplier lists

- ASOS
- Barkers Clothing
- Common Good
- Etiko
- Factory X
- Gorman
- Hallenstein Glasson Holdings
- Icebreaker
- Jeanswest
(Published after our research cut-off)
- JETS
- Kathmandu
- Next
- The Warehouse Group

willingness to be accountable to consumers, civil society, and workers; and makes it easier for these groups to collaborate to ensure the rights of workers are upheld.

One significant element of transparency is the publication of a list of suppliers that includes their business names and addresses. Since the first edition of The Report, the proportion of companies publishing supplier lists has substantially increased every year. In 2013, it was just 16% of companies publishing supplier lists. This year, the proportion is 34%. In the last twelve months alone, at least 13 companies have begun publishing their supplier lists, including those highlighted on this page.

In this year's edition of The Report, in line with the Transparency Pledge, an initiative put forward by

* The Responsible Down Standard ensures that all down and feathers comes from ducks and geese that have been well treated. See more at <http://responsibledown.org/> (accurate at 3rd April 2018).

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a coalition of civil society groups including Human Rights Watch,¹² Baptist World Aid Australia has begun to collect data to assess which companies are going beyond minimum standards for transparency, by providing detailed information on suppliers in line with industry best practice.

The Report identifies that 18% of companies are providing significant detail on their suppliers – including such information as the number of workers, a breakdown by gender, the types of products being produced, and any corrective action plans on the facility.

This information makes it far easier for journalists, NGOs, workers, and unions to verify that the claims companies make about their labour rights systems are accurate, and that a company's labour rights systems are working as intended.

Non-Responsive Companies and Low Transparency

Low transparency is one of the biggest determinants for the receipt of a low grade in The Report, because companies are graded based on a combination of publicly available information, and any information they are willing to disclose to The Report's researchers.

As mentioned previously, 77% of companies choose to engage with The Report's research, with most companies seeing value in the process of being benchmarked and gaining feedback.

Levi Strauss and *PVH Corp* (producer of *Tommy Hilfiger* and *Calvin Klein* brands) are examples of

companies that did not engage. However, due to their high levels of public transparency, both companies were graded relatively well, receiving a B- grade. Notably, non-responsive companies *The Warehouse*, *Karen Walker*, and *Anthea Crawford*, all receive C grades, largely due to their commitment to public transparency.

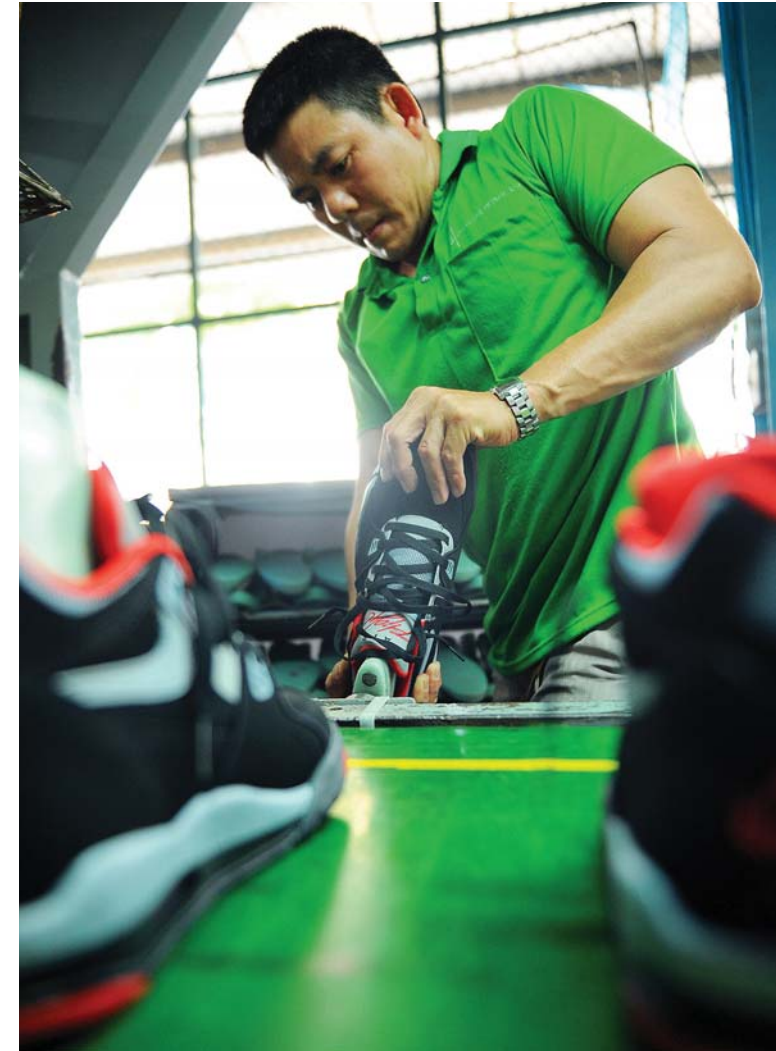
However, several companies have chosen not to disclose or make any information publicly available. Without this information, it becomes almost impossible for the public to know whether companies are investing sufficiently to ensure that workers are not being exploited. For this reason, these companies receive an F grade in The Report.

For more information about the research process and non-responsive companies, refer to the methodology (page 18). Non-responsive companies were also given the opportunity to provide a statement about why they chose not to engage with this research. These statements are included on page 93.

Living Wage

The global fashion industry continues to grow each year and is among the most labour-intensive in the world. It is also a significant driver of employment for groups that have been traditionally vulnerable – women, migrants, and young people. In some cases, the industry has been a source for empowerment and a stepping stone to a better life for these individuals. However, too often, it has become a facilitator of exploitation.

© ILO/Nguyen A., via: <https://flic.kr/p/nsuGIC>



A Worker in Dong Nai, Vietnam.

EXECUTIVE SUMMARY

KEY FINDINGS

A wage that is sufficient for workers to be able to afford the basics (food, water, healthcare, clothing, electricity, and education) for themselves and their dependants — a living wage — is recognised as a human right. Yet most garment sector workers receive wages well below this. It comes as no surprise, then, that low wages are among the chief concerns for workers.¹³

In Bangladesh, the minimum entry level wage for a garment worker is US\$63 per month. Calculations by the Global Alliance for a living wage suggest that a fair living wage would be approximately US\$214 per month for Dhaka and US\$177 per month for satellite cities around Dhaka. However, even in the satellite cities, this estimation of a living wage is 2.8 times the current amount paid to an entry level worker. In Vietnam, the minimum wage is US\$153 per month, nearly half that of the estimated living wage at US\$290 per month.¹⁴

The benefits of a living wage are substantial. In fact, payment of a living wage could transform the lives of millions by allowing people to lift themselves out of poverty; and, at the same time, drive economic growth within communities and nations. Living wages also mean that parents earn enough to send their children to school, rather than to factories. This would mean that, where such wages are paid, the likelihood of other forms of exploitation, such as forced labour and child labour, fall dramatically. It is also worth noting that, given the importance of wages to workers, being able to demonstrate that workers are receiving a living wage, is one of the most telling signs that

a corporate labour rights system is genuinely responsive to the needs of workers.

It is encouraging that more companies are increasingly taking the challenge of paying a living wage seriously. 34% have adopted a methodology to calculate a living wage. Worryingly however, only 17% of companies could demonstrate that workers, in any part of their final stage of the supply chain were receiving a living wage. Only one in 20 companies demonstrated that all workers at their final stage were being paid such wages.

Fairtrade brands and *Outland Denim* are the standouts in The Report when it comes to ensuring that a living wage is being paid. *Outland Denim* owns its factory at the first tier of production. They have developed a living wage methodology, partnering with their workforce to understand what a fair living wage looks like in the region where they operate. *Outland Denim* also ensure that this wage is paid, as a minimum, to all workers and seek out fabric suppliers with a track record of promoting labour rights. For example, workers from their primary fabric supplier receive wages arrived at by a collective bargaining agreement. And *Outland Denim* has demonstrated that these wages are consistent with a living wage in the region.

Common Good and *Etiko* could likewise demonstrate that living wages are being paid to all workers for their final stage production, and in the production of their fabrics.

Among larger producers, *Hanesbrands* is one of the leading companies. More than 70% of its manufacturing, and a significant proportion of its fabrics production, comes from company-owned facilities. *Hanesbrands* has worked with economists and conducted an extensive benchmark of its workers in these facilities to estimate what level of household income is needed to cover the basic needs of workers. They have then ensured that all workers are paid more than this amount.

Other commendable efforts include *Kmart Australia*, which has benchmarked wages in a few of its Bangladeshi facilities and is now beginning to implement initiatives to raise wage levels. Companies that produce in Australia and are accredited with Ethical Clothing Australia (ECA) are also noteworthy. ECA ensures that wage levels and working conditions for Australian production (at a minimum) meet with Australian standards. Companies accredited with ECA include *Anthea Crawford*, *Cue Clothing*, and *R.M Williams*.

EXECUTIVE SUMMARY

NEW AREAS OF RESEARCH

New Areas of Research

Gender

This year, for the first time, The Report's grading metric assesses companies on their gender policies and strategies. Women represent about 80% of global garment workers.¹⁵ Despite this, gender-based discrimination in recruitment, and sexual harassment, are widespread in the workplace. All countries in the Asia-Pacific report a gender pay gap. The gap is most significant in Pakistan, India, and Sri-Lanka at 66.5%, 35.3%, and 30.3% respectively.¹⁶

Given the importance of women in the garment production workforce, and the widespread evidence of discrimination, best practice for companies operating in the global fashion industry should include specific policies on gender, and strategies to mitigate discrimination and ill-treatment of women in the supply chain.

The Report found that just over one fifth of companies (22%) had a robust gender policy and strategy, while a further 16% received partial credit. In most cases these companies had a policy but no clear strategy for implementation.

Benchmarking Environmental Performance

The Report has been a driver for continuous improvement in labour rights management systems in the global fashion supply chains for five years. However, the authors acknowledge that an ethical company goes beyond empowering workers throughout their supply chain and paying

them a living wage; their work will also include efforts to address impacts on the environment.

This year, Baptist World Aid Australia began an initial assessment of companies' efforts to mitigate their environmental impact. We asked 11 questions that looked at impacts on the climate, at chemical management practices, at water usage, the use of sustainable fibres, the provision of take back and repair programs and finally, on whether companies have completed an environmental impact assessment.

While assessments of environmental systems will not impact the grades awarded to companies in this year's report, it is anticipated that they will form a part of the grading system in future reports.

This preliminary research is telling. It demonstrates a significant correlation between the strongest labour rights performers and strong environmental systems; and, while large global firms (in most instances) had some environmental systems in place, firms headquartered in Australia and New Zealand are largely trailing behind their international counterparts. It is the hope of the Baptist World Aid Australia and Tearfund New Zealand research team (The Research Team) that benchmarking efforts will spur progress on this critical issue.

See page 51 for further information about this environmental benchmarking approach, including a full list of questions asked and who the strongest performers were — according to preliminary research.



Workers unions at an International Womens Day event organized by Pakistan Workers' Federation in 2016.

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CONCLUDING REMARKS

Concluding Remarks

The global fashion industry has potential to be a tremendous force for good. Its significance for the nation of Cambodia powerfully illustrates this point.



Ando International, a Vietnamese garment firm with 900 workers in Ho Chi Min City, has improved significantly in labour standards since joining Better Work Vietnam, a labour rights improvement initiative.

The fashion industry employs 749,000 workers in Cambodia, representing 59.7% of the total manufacturing workforce and 5% of the population.¹⁷ In 2015, the industry made up 11% of the economy, contributed a full 2 percentage points to the nation's 7% growth rate, and made up a full 80% of the country's total merchandise exports.¹⁸

Minimum wages for garment workers have also been increasing in Cambodia. From just US\$62 per month in 2012, garment worker wages have increased to US\$170 per month today.¹⁹

This brief case study illustrates how the global fashion industry can fuel the growth of economies and, at the same time, facilitate a road out of poverty for hundreds of thousands of people and their families.

However, Cambodia's story also demonstrates that the global fashion industry drives oppression and exploitation. Achieving this wage increase has not been without its costs, culminating in deadly government crackdowns. On January 3, 2014, garment workers held a strike for improved pay, ultimately leading to violence which left four people dead and dozens more injured and imprisoned.²⁰ More recently, new laws introduced by the Cambodian Government have stifled union activity.²¹

More and more across the global fashion industry, consumers, investors, and, increasingly, governments expect companies to ensure that they have systems in place to mitigate the exploitation of workers and uphold their rights.

Around the world (in the state of California, the United Kingdom, and the European Union), various government bodies have enacted legislation that requires companies to disclose what they're doing to address the risk of exploitation throughout their supply chains. The French and the Dutch governments have gone a step further, calling for mandatory plans to address labour rights and environmental risks. The Australian government, inspired by the UK's Modern Slavery Act, has announced that it will adopt legislation by the end of 2018 (see more on page 29).

While this shift in expectations is welcome — and the progress made by the global fashion industry is commendable — consumers, companies, and governments can still do more to fight exploitation.

Consumers should continue to preference those companies doing the most to uphold the rights of workers in their supply chains, and call on those that aren't to do better. Companies should continue to strengthen their labour rights systems and ensure that workers — from farm to factory — receive a living wage. And the Australian and New Zealand governments should introduce robust legislation requiring companies to publicly report on the measures taken to address the risk exploitation throughout their supply chains.

The intention of The Report is to assist these efforts, and, in doing so, help the global fashion industry realise its potential to contribute to a world free from poverty and exploitation.

2

Methodology

This section outlines the aims and scope of our research, the process of data collection and evaluation, and our company grading system.

This research provides a picture of ethical sourcing practices in the fashion industry as a resource for consumers, corporations, investors, and policymakers.

It seeks to empower consumers to make more informed and ethical choices in purchasing fashion and footwear, and provide insight into supply chain governance for investors. Its aim is to help companies with benchmarking and learnings, as well as identify issues for policymakers to address. By presenting the performance of companies, relative to each other, via an A-F grading (updated on an annual basis) the goal is to encourage individual companies, and the industry as a whole, to engage in constant improvement of their ethical sourcing practices.

At a system level, The Research Team recognise the positive impact that the global fashion industry can have around the world. The goal is to contribute to ending worker exploitation and alleviating poverty in the developing countries where fashion is manufactured.

Scope of the research

The Report classifies the fashion manufacturing supply chain into three stages of production: final stage, inputs stage, and raw materials stage — as defined on page 21. Across these three stages of production, this research considers four broad themes of social responsibility: policies, knowing suppliers, auditing/supplier relationships and worker voice — also defined on page 21.

The Report does not directly grade companies on their environmental impact. The intent is that environment impact will become a key metric for grading in the future.

In 2018, The Report covered 114 companies of varying sizes, across men's, women's, and children's fashion and footwear. It is worth emphasising that The Research Team do not conduct site inspections of factories as part of their grading. Therefore, company grades are not an assessment of actual conditions in factories and farms, but rather an analysis of the strength of a company's labour rights systems. This research relies on data that is publicly available, alongside evidence of systems and practices provided by companies themselves.

Data collection and evaluation

As a proxy for the entire fashion supply chain, The Report assesses a large selection of companies on 33 specific criteria, at three critical stages of the supply chain.

This tool has been developed with input from supply chain specialists, non-government organisations (NGOs) and company experts. Its criteria draws upon international standards, including those articulated by the ILO, the Sustainable Development Goals, and the United Nation's Guiding Principles for Business and Human Rights. The tool evolves over time, as we incorporate new learnings and reflect industry best practice. For example, this year included a question about gender policy and strategy, and a question about publishing detailed information

Comment on non-responsive companies

Companies which are non-responsive, along with those that do not provide any substantive information, are indicated in this report by an asterisk (*) next to their name. These companies were also given the opportunity to provide a short statement as to why they chose not to respond, and these can be found on page 93.

We acknowledge that many of the non-responsive brands may be doing more to improve their ethical sourcing than we have been able to assess them on. However, if brands do not disclose, or are unwilling to disclose, what they are doing to ensure that workers are not exploited in their supply chains, then it becomes almost impossible for consumers and the public to know if these brands are investing sufficiently to mitigate these risks.

on suppliers. The research tool (and The Report) is now largely regarded as one of the leading benchmarks for the global fashion industry.

In conducting a company evaluation, The Research Team assesses a company's own publications alongside any relevant independent reports and data. The Research Team sends its findings — marked against the assessment criteria — to the company for comment and further input, which

METHODOLOGY

is reviewed in turn. The Research Team seeks to engage with companies, collect evidence, and understand their processes and systems; however, the research team does not conduct site inspections as part of the grading process.

Beyond engaging brands, The Research Team also works with relevant certifiers to get a better understanding of what systems are covered by their certification. Where companies use these certifications, information from the certification body is considered in the process of the company's assessment. Certification bodies that have been engaged with include Better Cotton Initiative (BCI), the Global Organic Textile Standard (GOTS), Fairtrade and Ethical Clothing Australia (ECA).

The Research Team actively seeks to engage companies (and pursue contact with non-responsive companies) using at least three different mediums: phone calls, emails, and letters. All non-responsive companies receive the findings twice by post. Letters are also mailed to the company's Board Chair and CEO. This process seeks to ensure that in almost every instance where a brand has not responded, it is because it has intentionally chosen not to do so.

In 2018, 77% of brands have engaged directly with this research process.



Smiling graduates of a Ready Made Garment Course, as part of a program that works towards reforming technical and vocational education and training in Bangladesh.

METHODOLOGY

What the research covers

The research collects and evaluates data from fashion companies using the following classification of the supply chain and across the following themes of social responsibility.



RAW MATERIALS

- **Cotton** (*farming*)
- **Wool, etc** (*husbandry, shearing etc*)
- **Crude Oil for synthetic fibres, plastics, etc** (*extraction, refining*)



INPUTS PRODUCTION

- **Textiles production** (*ginning, spinning, knitting, dyeing, embroidery*)
- **Leather** (*tanning*)
- **Plastic** (*processing, moulding*)



FINAL STAGE PRODUCTION

- **Cut-Make-Trim (CMT) manufacturing** (*cutting, sewing, printing*)

| Policies | Transparency and Traceability | Auditing and Supplier Relationships | Worker Empowerment (<i>and living wage</i>) |
|---|--|--|---|
| <p>Why it matters: Policies form the standards that brands want their production to adhere to. They are the baseline by which a brand can measure the effectiveness of its overall efforts to uphold worker rights.</p> <p>What we assess: Provisions to prohibit forced labour and child labour, allow for freedom of association and protect worker health and safety; whether a brand intends its policies to cover the entire production process; whether the brand is undertaking important measures towards improving working conditions in facilities.</p> | <p>Why it matters: In order to ensure that worker rights are being upheld, brands need to know which facilities are responsible for the production of their product.</p> <p>What we assess: How much of the supply chain a company has traced; what it does to monitor and address subcontracting; what efforts it is undertaking to trace the remainder of its supply chain; a brand's transparency and how willing they are to be held accountable through the information it shares about its supply chain.</p> | <p>Why it matters: Monitoring facilities and building relationships are critical to ensuring policies are adhered to and improvements in working conditions are being delivered. While no monitoring process is perfect, high quality monitoring helps to provide a better understanding of the conditions of workers. A focus on strengthening relationships allows trust building, and increases a brand's capacity to drive change.</p> <p>What we assess: What percentage of production facilities are audited; whether unannounced and offsite worker interviews and anonymous worker surveys are used; whether checks are done on high risk activities like labour brokers and recruitment fees; whether the brand is willing to be transparent about its results and remedial actions; whether brands are actively involved in building supplier relationships through consolidation, collaboration, supplier training and long term relationship building.</p> | <p>Why it matters: For a labour rights system to improve working conditions, workers must be empowered, allowed a voice, and have their most critical concerns addressed. It is workers themselves who have the best visibility of working conditions.</p> <p>What we assess: Whether workers are able to unite through democratic trade unions; whether collective bargaining agreements have been established; whether effective grievance mechanisms are in place; whether workers are receiving a living wage so they can support their families; a brand's efforts in moving towards paying a living wage.</p> |

Data Verification

To verify the data provided by companies, company responses are reviewed and clarification and supporting documentation are sought where necessary. In some instances, the audit data provided by companies is relied upon to verify conditions and benefits that workers receive.

Wherever possible, The Research Team and company representatives work through the survey questions, allowing both parties to be satisfied that the data presented is an accurate representation of the company's policies and processes.

To ensure consistency in the assessment of companies, after finalising company responses, survey responses are cross-checked.

Increased Validation Requirements

As part of this year's research process, companies were provided with an Assessment Support Document. The Assessment Support Document acted as a helpful guide for companies, including a rationale for each survey question and several examples of what constitutes a strong labour rights system. The Assessment Support Documents also detailed the validation requirements necessary for demonstrating that systems or policies asserted by companies to be in place, were, indeed, in place. In several instances, the level of supporting documentation or validation requested was greater than in previous reports. Additionally, in a few instances, the threshold necessary to receive credit for a question was increased.

Take, for example, the criteria relating to supplier lists and the criteria for living wage. In years past, partial credit has been awarded for publishing a supplier list, where a company has disclosed its factories through the Bangladesh Accord on Fire and Building Safety. This year, however, in-line with prevailing industry best practice, no credit was given unless the company made their supplier list publicly available, and suppliers were directly traceable to the company (rather than to a group of companies, as is the case with the Bangladesh Accord on Fire and Building Safety).

Similarly, in past reports, a partial credit on living wage was given to companies that were paying wages substantially above the minimum wage. This year, no credit was awarded without a company demonstrating that a supplier was paying a living wage to entry level workers, as benchmarked against an adequate living wage methodology.

The result is more robust data and, importantly, a survey tool that is in-line with prevailing best practice across the global fashion industry. However, it has also meant that the rating of some companies (that, in previous years, would have been awarded at least partial credit for these survey responses) has been impacted.

Finally, there is one company graded by The Report which was not marked down for withholding the address of its final stage factory. Outland Denim intentionally employs former victims of abuse and trafficking. It chooses to keep the address of its factory secret, not as a means

of protecting intellectual property but, rather, as a protection measure for vulnerable workers.

In this instance, publishing a factory list may do more to undermine the welfare of workers, than to enhance it. While this did not impact the grading process, in the interest of transparency, the company has allowed Baptist World Aid to visit its factory and to interview workers.

Grading

The grades awarded in this report are a measure of the efforts undertaken by each company to mitigate the risks of forced labour, child labour, and worker exploitation throughout their supply chains. Higher grades correspond to companies with a labour rights management system that, if implemented well, should reduce the risk and extent of worker exploitation in the production of that company's products. Low graded companies are those that are not taking these initiatives, or those choosing not to disclose if they are taking such initiatives.

It is important to note that a high grade does not mean that a company has a supply chain which is free from exploitation. Rather, it is an indicator of the efforts the company is undertaking and the strength of its systems to reduce the risk of exploitation. Furthermore, The Report's grading methodology is designed to spread companies out along an A-F continuum, based on the relative strength of their efforts — similar to awarding grades on a bell curve (i.e. the best performers



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Workers at Ando International, a Vietnamese garment firm.

receive A-range grades, the worst receive F grades, with many others in the middle).

Some company structures own several brands with differing labour rights management systems. In these cases, The Report grades brands separately. Individual brands corresponding to a single company are listed, alongside their grade, in the Brand Index on page 55.

Environmental Impact

This year, we collected preliminary data on the industry's efforts to manage environmental impact. A full description of how the environmental metrics were developed (including what questions were asked and why) can be found on page 51.

While assessments of environmental systems will not impact grades awarded to companies in The Report this year, it is anticipated that they will form part of the grading system in future.

It is the hope of The Research Team that this will spur companies to understand their impact on the environment and take the actions necessary to see their industry become sustainable.



Five Years since the Rana Plaza Disaster

In this section we remember and reflect on the fifth anniversary of the Rana Plaza Disaster – an event that shone a light on the darkest parts of the Fashion Industry.

FIVE YEARS SINCE THE RANA PLAZA DISASTER

Five years ago, a disaster of such magnitude occurred that the course of the fashion industry was irreversibly changed.

On 24 April 2013, Rana Plaza collapsed in the Savar district of Dhaka, Bangladesh, claiming the lives of 1,134 people and injuring over 2,000 more. The eight-storey building took just 90 seconds to be reduced to rubble.

Appallingly, this disaster followed the site's evacuation only the day prior due to structural concerns — a result of dire overcrowding and poor (and illegal) construction. Despite this fact, garment workers were coerced into returning to work on the day of the collapse.

Sadly, the Rana Plaza disaster was not an isolated incident, but rather, the latest in a spate of similar factory disasters. Exactly six months before, a fire ripped through the Tarzeen Fashion factory (also in Bangladesh) killing 117 people. A month before that, the Ali Enterprises fire in Pakistan claimed the lives of 254 more.

These tragedies mark a crucial turning point in global consciousness of the labour rights issues in the fashion industry.

Until the Rana Plaza tragedy, few global fashion companies chose to make information about their supply chains publicly available. Where clothes were made, and the conditions they were made in, was, largely, invisible to the world.

But the global community was so horrified by the news reported in papers and by the pictures

flooding TV screens, that it began to take notice and demand change. And through the combined action of various stakeholders — including consumers, governments, garment workers, civil society groups like Baptist World Aid Australia, and even fashion brands themselves — change is occurring.

Five years on, we seek to honour the lives lost in these three tragedies and reflect on the progress that has been made.

Greater supply chain transparency

Today's supply chains are complex; and frequently, global in nature. Without transparency, the task of holding companies to account becomes problematic. The collapse of Rana Plaza threw the need for increased transparency into the global spotlight.

According to Human Rights Watch, “supply chain transparency — starting with publishing names, addresses, and other important information about factories producing for global apparel companies— is a powerful tool to assert workers' human rights, advance ethical business practices, and build stakeholder trust”.²²

The proportion of companies publishing supplier lists has doubled since the Rana Plaza disaster. In 2013, just one sixth of companies that were assessed were publishing supplier lists; in The 2018 Report, the proportion is one third. Furthermore, of those publishing information, almost half are going beyond providing names and addresses for factories and are publishing detailed information

such as the number of workers, the proportion of male to female workers, or the types of products being made.

Government Initiatives

In countries where worker protections are weak or non-existent, abuses such as forced labour, human-trafficking, and slavery are rife. Exploitation exists at every stage of the global garment industry supply chain.

Following the example set by California, the UK, and France; Baptist World Aid Australia worked with others, including the Walk Free Foundation and Stop the Traffik, to campaign the Australian Government for a law to fight slavery.

There is now bipartisan commitment to introduce modern slavery legislation into parliament by the end of 2018. Additionally, earlier this year, the New South Wales State Parliament tabled Australia's first Modern Slavery Bill.

Read more on page 29.

Sector Initiatives

Sector initiatives continue to drive change in the fashion industry, making it a safer and more equitable place of employment for people across the world. Some examples are:

- Asia Floor Wage Alliance (active since 2005) — an international alliance of trade unions and labour rights activists who are working together to demand garment workers are paid a living wage.²³ Given that 43 million garment workers

FIVE YEARS SINCE THE RANA PLAZA DISASTER

are employed in the Asia-Pacific region,²⁴ this is an important initiative.

- Action, Collaboration, Transformation Initiative (ACT Initiative) — a collaboration between 17 fashion brands and retailers, manufacturers, and trade unions to address the issue of living wages in the textile and garment supply chain.²⁵ Participating brands include *Kmart*, *Next*, *Inditex*, and *H&M*.
- Better Work — a partnership between the United Nations, the International Finance Corporation, and the ILO, which brings diverse groups together — governments, global brands, factory owners, and unions and workers — to improve working conditions in the garment industry.²⁶ A recent independent study on the effectiveness of the program demonstrated that aggregate non-compliance rates have decreased, indicating improving working conditions in factories.²⁷

Case Study: Bangladesh Fire and Safety Accord – the Last Five Years.

The Bangladesh Fire and Safety Accord was established in May 2013 in response to the Rana Plaza collapse. The Accord is an independent, legally binding agreement between brands and unions, designed to work towards a safe and healthy Bangladeshi Garment industry. It has been signed by over 200 companies from Europe, North America, Asia, and Australia.

The Accord Agreement consisted of six key components:

- a five year legally binding agreement between brands and trade unions to ensure a safe working environment in the Bangladeshi garment industry;
- an independent inspection program supported by brands incorporating workers and trade unions;
- public disclosure of all factories, inspection reports, and corrective action plans (CAPs);
- a commitment by signatory brands to ensure sufficient funds are available for remediation and to maintain sourcing relationships;
- democratically elected health and safety committees in all factories to identify and act on health and safety risks; and
- worker empowerment through an extensive training program, complaints mechanism and right to refuse unsafe work.

Since its establishment, 2096 factories have been inspected under the Accord program. 96 of these have been terminated for failure to comply with Accord standards, 1631 factories are currently covered under the Accord program with pending CAPs, and the remaining 369 factories are either closed, transferred, or still awaiting inspection.

While a substantial amount of remediation is occurring under the Accord program, the most recent data demonstrates that 72.9% of CAPs remain behind schedule. Only 1.5% of factories have fully completed their CAP, 6% have completed their initial CAP, and a further 8.4% are proceeding on track.

Earlier this year, a major settlement was reached resulting in a US\$2.3million payout to fix issues at over 150 garment factories across Bangladesh.²⁸ Unions responded positively to this settlement, saying that it was proof that the Accord was serving its purpose.²⁹

With the end of the Accord's five-year term approaching, it was announced in June 2017 that the agreement would be extended for a further three years. However, a report published by the Bangladesh Investors Initiative found that only 53 of the 220 current Accord signatories have signed on to the 2018 Accord, causing significant concerns about the effectiveness of the project moving forward.³⁰ This includes a number of well-known Australian brands operating in Bangladesh.³¹

4 Interwoven Stories

The global fashion industry is a significant force. An industry of its size brings many stakeholders together, creating a tapestry of interwoven stories. This section acknowledges the actions of key stakeholders – from consumers, to governments; companies to workers – in bringing about change worth celebrating.

INTERWOVEN STORIES

CONSUMER ADVOCACY

Consumer Advocacy

As public awareness of labour rights in the fashion supply chain has increased — sparked, largely, by the Rana Plaza disaster — so too has understanding of the critical role that consumer advocacy plays in ending exploitation in the global fashion industry.

Whether acting as individuals who make informed purchasing choices, or as a collective group through mass-mobilisations, consumers in Australia, New Zealand — and across the world — are taking hold of this role and creating change.

Raising Awareness

Through education, consumers are moved and mobilised to seek change. Across Australia and New Zealand, churches, schools, universities, and community groups are running events and coordinating actions aimed at increasing the awareness of issues of worker exploitation.

Over the last two years, for example, Baptist Churches around Australia (with the support of Baptist World Aid Australia) have been hosting screenings of documentaries on labour rights abuses in the global fashion industry, educating members of their church and wider community; clothes swaps and second-hand fashion parades have been held, educating consumers on the impact of current consumption models; Opinion pieces, Letters to the Editor, and blogs have been written; and conversations have taken place across dinner tables and classrooms.

Advocating to companies

Companies listen when consumers speak. Consumer campaigning has consistently proven to be one of the most effective tools for changing the supply chain practices of fashion companies.

The improvements in transparency and traceability within the global fashion industry, in addition to the notable increase in company engagement with The Report, can, in part, be attributed to the persistent call from consumers demanding to know where their clothes are being made; who their clothes are being made by; and under what conditions workers are labouring.

Postcard campaigns, letter-writing actions, social media posts, and even the casual conversation with store managers have all contributed to the positive progress that has been made in the Australian (and global) fashion industry.

Changing shopping habits

Consumers are becoming increasingly aware of the story behind the barcode on their clothes. Every year, tens of thousands of people order and download the Ethical Fashion Guide (supplement to The Report) as a tool to help them preference the brands that are doing more to protect the workers in their supply chains.

In Melbourne, New Hope Baptist Church's 'Unshackled' group have been mobilising their community to make ethical shopping choices for many years. Haley Chambers from New Hope Baptist Church explains, "We try to raise

awareness, support learning and point people to the things they can do to bring change."

One initiative run by Unshackled is their Guided Ethical Shopping Tours — taking groups, including school groups, on tours through shopping centres to learn more about the ethical shopping options available in their local centre. With the Ethical Fashion Guide and other tools on hand, they inform groups about the range of human rights concerns in supply chains, but also empower groups to understand and recognise ethical certifications, and guide them on how to ask helpful questions of retail assistants to encourage their favourite brands to do more. Unshackled have also recently run their first Ethical Fashion Show, showcasing ethical brands to the community with speakers teaching more about supply chain concerns, and the role all consumers can play to change the industry with their shopping habits.



The Ethical Fashion Show, hosted for the community by Unshackled at New Hope Baptist Church in 2017.

INTERWOVEN STORIES

GOVERNMENTS

Governments

Governments have a critical role to play in ending child labour, forced labour, and exploitation in corporate supply chains. By implementing and enforcing laws and policies that uphold worker rights, prosecute offenders, and protect victims, all governments can fulfil their responsibility of helping prevent and redress exploitation of this kind.

In countries with large consumer populations, like Australia and New Zealand, one of the most effective ways for governments to fight exploitation is through the regulation of company supply chain practices, operating within its jurisdiction.

Supply Chain Regulation

In response to the prevalence, and growing awareness, of human rights abuses throughout global supply chains, a number of governments have introduced various legislative mechanisms that require companies to publicly report on the measures they have taken to address worker exploitation.

These mechanisms include The California Transparency in Supply Chains Act (CTSCA), which requires retail and manufacturing businesses operating in California with an annual turnover of over US\$100m to publish efforts they have made to combat forced labour in their supply chain; The UK Modern Slavery Act, which includes a requirement that businesses with a total global annual turnover of £36m or more must disclose

what steps, if any, they are taking to ensure that slavery, forced labour and human trafficking are not taking place in their supply chains; and the more recent French Duty of Vigilance Law, passed in the French Parliament in 2017, which requires companies with over 5,000 employees in France, or over 10,000 globally, to establish due diligence safeguards designed to ensure that labour rights are respected throughout the supply chains.

Australia and New Zealand

In February 2017, the Australian Government launched the Joint Standing Committee on Foreign Affairs and Trade's Inquiry into Establishing a Modern Slavery Act in Australia. As part of this Inquiry, Committee members were tasked with considering whether this Act should include a provision requiring companies to report on the steps they had taken to ensure there is no slavery in their supply chains.

In April 2017, and again in October 2017, Baptist World Aid Australia put forward submissions to this Inquiry. Baptist World Aid Australia was also invited to give direct input to decision makers from both major parties; campaigning for a legislated requirement that ensures companies report on their due diligence efforts to end exploitation in their supply chains.

Baptist World Aid Australia asked for a central repository of those reporting statements, so that the public can track progress and hold businesses accountable; it recommended that there should be penalties for non-compliance; and it called for

a threshold to capture the majority of companies, in industries where the risk of slavery and exploitation is high.

Throughout the Inquiry, this research played a pivotal role in highlighting the risks of slavery and exploitation in the supply chains of Australian fashion companies.³²

By November 2017, the Inquiry had handed down a robust set of final recommendations (which satisfied all of the abovementioned asks) and both the Coalition and Labor Party had committed to introducing legislation of this kind.

It is expected that a Modern Slavery Act will be passed in the Federal Parliament before the end of 2018, and that companies will be required to begin reporting from the second half of 2019.

With a Modern Slavery Act nearly a reality for Australia, calls for a Modern Slavery Act in New Zealand are now mounting. Tearfund New Zealand, a partner in the research of The Report, will be an active participant in campaigning for robust legislation. The Research Team looks forward to celebrating the contribution that these nations will make towards ending the exploitation of workers around the world.

INTERWOVEN STORIES

COMPANIES

Companies

Companies play a central role in addressing labour exploitation risks within their supply chains. That there are many companies working with The Research Team on these issues, proactively learning and engaging in solutions, is to be celebrated.

Outland Denim, located in the Cambodian province of Kampong Cham, is a company that has been built with the intent of empowering workers and ensuring that the garments they produce are sustainable.

The company was founded in response to a question: “How do we protect women and girls from the illicit \$100 billion global sex slave trade?”

But this question was only posed after a personal encounter with the problem.

Founder and CEO, James Bartle, was shocked into action by the sight of a girl — not much older than his nieces — selling her young body on the streets of Thailand.

Outland Denim’s research revealed that poverty was an underlying factor pushing young women and girls (often from impoverished rural communities) into sexual slavery. It also demonstrated that sustainable employment would help to mitigate this problem, giving workers the opportunity to provide for themselves, safely, and remit a portion of their income to their families.

This is a theory that the company has demonstrated in practice.

© Outland Denim/Sophie Baker.



Outland Denim seamstresses.

INTERWOVEN STORIES

COMPANIES



© Outland Denim/Sophie Baker.

An Outland Denim seamstress.

Outland Denim's longest serving seamstress was able to buy her sister out of bondage and build her family a home. She now has a baby girl of her own.

Outland Denim started as a training and employment operation — a way of providing opportunity to young women who were recovering from traumatic experiences of sexual exploitation and abuse. Today, it has grown into a social enterprise that employs seamstresses from varying backgrounds of vulnerability, including disabilities and long-term unemployment.

These women, each with differing needs, are remunerated with living wages; nurtured in an encouraging, understanding workplace

environment; and trained to compete on the global stage, with the best of the premium denim brands.

"I feel proud of myself now, because when I go back to my village people say good things about me because I have good work," says Outland Denim seamstress, Nakry.

"I helped to buy a tractor for my family and pay someone to plant rice on our field."

Heading up Outland Denim's production house in Cambodia is Phanith. The son of tailors, he has worked in the garment industry for some 24 years and was attracted to Outland Denim because it would give him the opportunity to use his skill set to help others. He works with both highly skilled and unskilled trainee seamstresses.

"We train them to use the different types of machines, in handling, and in technical skills, step-by-step until they understand the more complicated techniques," says Phanith.

"Working in the factory, they demanded an exact amount every day," says Outland Denim seamstress, Kanya. "But here at Outland Denim, you work on quality first.

"So, even though I make less, I make it well so that it is accepted."

Outland has created career pathways for its seamstresses and uses a graded pay system to encourage upskilling. Additionally, the company takes a holistic approach to staff development, providing English and tailoring lessons; budgeting and self-defence classes; and a host of other employment benefits.

The denim industry, and its practises, contribute significantly to environmental degradation. In turn, this impacts on precariously positioned agricultural communities, from which many Cambodian families derive their income. That's why Outland Denim created a zero-exploitation ethos, which undergirds its ecological position, as well as its humanitarian outlook.

It was only after six years in development that this social enterprise entered the global marketplace. That's six years of perfecting its business model, supply chain, and product (which is created using environmentally sustainable raw materials, including organic denim and wash techniques).

"The jean itself had to be superior in quality, in order for the company to be sustainable," says Bartle.

"People might buy a jean from you once because of the cause, but they will keep buying Outland Denim because of the quality, the fit, the sustainability credentials, and the ongoing social impact," he says.

And that impact means that Outland Denim seamstresses can plan for the future.

"When I came here I knew nothing, but now I know so much," says Outland seamstress, Srey Malis.

"Before I could not see my future. Now I can see a bright future ahead of me. I have confidence in myself and I have joy in my work."

INTERWOVEN STORIES

WORKERS

Workers

While visiting India in 2017 with Stop the Traffick, Baptist World Aid Australia staff met a group of garment factory workers from Dindigul, in the Indian state of Tamil Nadu. They shared their stories with us.

Mathuri* is 24 years old. She moved from her home to Dindigul to work in a spinning mill on the promise of employment and a bonus payment at the completion of her contract. For two-and-a-half years, she has worked and lived here, staying in a hostel that is managed by the factory she works for.

Living in a factory-owned hostel is common for spinning mill workers, but it comes with challenges. For instance, as Mathuri explained, “You have to obey when asked to work”.

When other workers don't turn up, Mathuri is expected to work a second shift. She is not given a break between these 16-hour-long double shifts and is only paid at the regular rate. There is no overtime pay.

For spinning mill workers in Dindigul, there are also a range of health concerns. Conditions are poor and protective equipment is often insufficient, or simply not provided. For example, workers are typically given surgical masks, but these masks don't adequately filter the cotton fibres in the air of a spinning mill. Furthermore, workers are expected to re-use their masks for up to a month, instead of receiving new ones each day.

After months of inhaling cotton fibres, difficulty breathing is a common problem. But there are few opportunities for workers to speak up on these issues. Factories have no grievance mechanisms to raise or address concerns. And, even when Third Party auditors are informed, nothing changes.

At the end of her two-and-a-half-year contract, Mathuri was not paid the lump sum bonus of 100,000 INR that was promised to her when she was first recruited. To this day, she continues to live with health challenges as a result of her job, including hearing problems due to a lack of protective equipment being provided while she worked in the noisy factory.

It is workers like Mathuri who are vulnerable to exploitation within the supply chain of the global fashion industry. Sadly, experiences like hers — of forced and excessive overtime, withholding of promised benefits or fair wages, health concerns and limited avenues to raise and address grievances — are commonplace.

By engaging all stakeholders, particularly those in positions of power and influence such as companies and governments, to learn of the issues and take ownership of the role they should play in addressing them, we can see stronger systems put in place within the industry. In doing so, we can prevent Mathuri's experience from occurring again and help end exploitation. As another worker from Mathuri's community shared, “We suffer a lot in the mills. We don't want our kids to have similar suffering”.

© Baptist World Aid Australia/Claire Harris.



Mathuri and other garment factory workers in Dindigul discuss their experiences of working in spinning mills.

* Name Changed. Story used with permission.

5

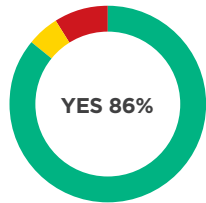
Policies

This section evaluates the policies that fashion companies have in place to address the risk of worker exploitation in supplier and subcontracted factories. Most companies have now adopted policies which set the minimum working conditions they expect of their suppliers and factories. Policies are the first step to creating a robust supply chain management system.

POLICIES

INDUSTRY OVERVIEW

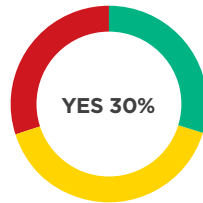
Does the company have a code that addresses the ILO Four Fundamental Principles and Rights at Work?



A Code of Conduct includes the basic worker rights which supplier factories are expected to observe. At a minimum, a good code of conduct will include the ILO's Four Fundamental Principles and Rights at Work. This prohibits child labour; forced labour; discrimination; and guarantees worker rights to freedom of association and collective bargaining.

Among the companies assessed, 86% have Codes of Conduct that include at least these basic principles. A further 5% have Codes of Conduct or other ethical sourcing statements which include some of these basic principles.

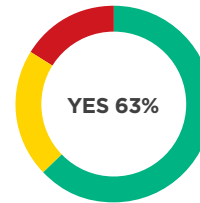
Does the code apply to multiple levels of the supply chain, including the raw materials level? (Partial = applies to inputs production)



By stating that their code applies to multiple levels of their supply chain, companies are accepting that their sphere of responsibility is not limited to their final stage manufacturers. The deeper, more removed levels of the supply chain are at greatest risk of worker exploitation, which makes efforts to ensure that these suppliers operate in line with Code standards critical.

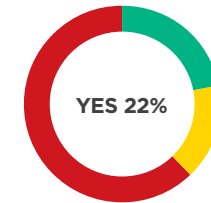
30% of companies reported applying their Code of Conduct to multiple levels of their supply chain, including to the level of raw material production, while a further 40% reported making efforts to insist standards within their Code of Conduct are adhered to as far as their fabric production suppliers.

Does the code prohibit use of regular and excessive overtime?



Regular and excessive overtime is a significant and ongoing issue for worker welfare in the global fashion industry. Long hours reduce worker safety, as most workplace accidents happen when workers are tired. Long hours also place undue stress on a large number of workers. Excessive overtime is often driven by low and insufficient wages and pressure from managers to extend working hours or meet deadlines. The majority of companies assessed have codes that include standards addressing limits on overtime.

Does the company have a policy addressing gender inequality in the supply chain, including a strategy to address discrimination faced by women in the apparel industry?



Women represent about 80% of global garment workers.³⁵ Despite this, gender-based discrimination in recruitment, and sexual harassment, are widespread in the workplace. Of note, is that all countries in the Asia-Pacific record a gender pay gap.³⁴ It is therefore important that companies proactively implement policies and clear strategies to address the vulnerability and discrimination faced by female workers in their supply chain.

We found that roughly one in five companies surveyed do have such systems in place. While a healthy start, this is an area that requires further industry attention.

POLICIES

BEST PRACTICE HIGHLIGHTS

Hallenstein Glasson Holdings – Tailored Gender Policies

Hallenstein Glasson Holdings (HGH) has developed specific gender policies for most of its sourcing countries. The policies are created based on an assessment of the gender context in each country, and data collected from facility audits - a great example of using auditing to inform and improve labour rights management systems, not just to monitor compliance.

Each country assessment of gender includes a root cause analysis which seeks to understand why women face inequality - both in the country and the industry.

The policy details what forms of gender inequality are found within facilities (e.g. pay disparities between men and women) and how *HGH's* monitoring system intends to track discrimination to identify, and remedy, inequality in its facilities.

Furthermore, *HGH* goes beyond assessing and monitoring. They have also established strategies to promote gender equality in their supply chain. These include: encouraging factories to have a female worker representative within factories that have a workforce with over 50% female staff; asking that suppliers display information

on women's rights within facilities; expanding business relationships with female-owned enterprises; providing or supporting training to workers, suppliers, and *HGH's* staff.

Country Road Group – Company-Wide Education on Ethical Sourcing

Ethical sourcing principles cut across many departments of a fashion company; and, without educating and reinforcing the importance of ethical sourcing practices, the issues can become siloed in sustainability departments. *Country Road Group (CRG)* has taken a proactive approach to educating employees and embedding ethical sourcing practices into day-to-day roles and responsibilities, as well as keeping their leadership team informed on social and environmental issues and risks within the supply chain.

Using their ethical sourcing policies and animal welfare principles as a foundation, the *CRG* sustainability and sourcing teams train all head office employees upon induction, ensuring that every employee knows how important ethical practice is to the company and what standards suppliers are expected to uphold. Particularly for those teams regularly visiting suppliers, it is

important that they are equipped to identify and best manage any concerns. The design and fabric teams are also given focused training on the environmental and social issues associated with raw materials, including cotton, leather, wool and cellulose.

This commitment extends to the *CRG* leadership team. An executive level Sustainability Steering Committee meets quarterly to oversee and guide the business' sustainability strategy. This also provides an opportunity for the sustainability team to update the Executive Committee on any ethical issues within the sector. This is a proactive approach that ensures executive decision-making considers sustainability and ethics.

It is encouraging to see company-wide education on ethical sourcing within *CRG*. By training staff members in all departments, and particularly sourcing teams, *CRG* is equipping staff to understand how their role impacts workers throughout their supply chain and is promoting compliance with company ethical sourcing policies.



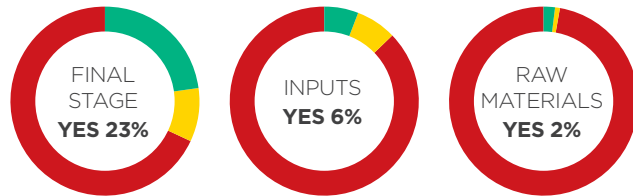
6 Transparency and Traceability

This section measures the degree to which a company has traced its suppliers at three key stages of production: final stage, inputs, and raw materials. It also looks at how transparent the company is with respect to the location and nature of its suppliers.

TRANSPARENCY & TRACEABILITY

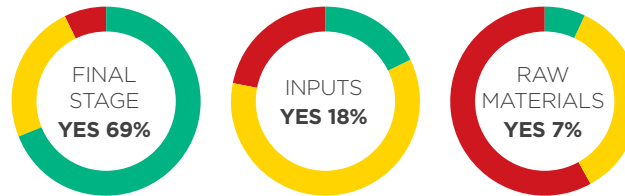
INDUSTRY OVERVIEW

Are broad auditing results shared publicly?



While most companies trace and audit their suppliers to ensure that basic working conditions are adhered to, it takes a particularly mature approach to transparency and social responsibility to admit that suppliers do not always meet standards set for them. Consequently, only 23% of companies shared data about their broad auditing results with the general public. We believe that admissions of noncompliance do not represent failures in social compliance; but rather, an important step towards greater transparency and accountability that will drive improved working conditions. It is the companies that are unable to identify or admit to concerns in their supply chain that are most hampered from improving.

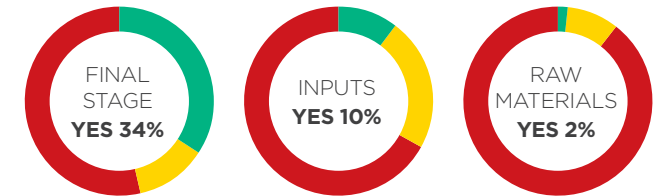
Has the company traced 100% of all of its facilities for the following stages of production (partial = some traced)?



Tracing the location of suppliers is an important way in which a company can begin to take responsibility for working conditions in its supply chain. It's almost impossible for companies to know that suppliers are adhering to Code standards if they do not know who their suppliers are.

69% of companies have traced all of their final stage facilities, but the level of traceability tapers for the more removed parts of the supply chain, particularly inputs and raw materials suppliers. It is in the parts of the supply chain, such as these, which sit outside of the purview of companies, that the risk of worker exploitation is both higher and least likely to be remedied. Of the eight companies that had traced 100% of their raw materials supply, six were Fairtrade certified.

Is there a public list of supplier facilities (including names and addresses)?



Publishing supplier lists is a way that companies can demonstrate to workers, consumers, and the public, that they are committed to being held accountable to the workers in their supply chain.

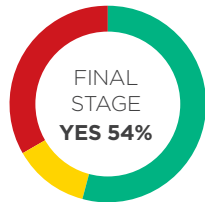
Transparency deepens the credibility of claims companies make about their supply chain systems and engenders trust. Of the companies assessed, 34% (up from 16% in 2013) published a full list of their final stage suppliers along with factory addresses. A further 12% received partial credit for disclosing a portion of their supplier list.

Key: YES PARTIAL NO

TRANSPARENCY & TRACEABILITY

INDUSTRY OVERVIEW

Does the company ensure that there is either no subcontracting or that all subcontracted production adheres to code standards at the final stage of production?



It is common for direct suppliers to subcontract orders out to other facilities. Where these subcontractors are unauthorised or unmonitored, the possibility that workers will be exploited increases substantially. This remains one of the greatest areas of risk in the global fashion industry supply chain. In acknowledgement of this, 54% of companies assessed have taken some steps at the final production stage, to ensure that either, there is no subcontracting, or that all subcontracted production adheres to the standards laid out in their Code of Conduct.

Key: YES PARTIAL NO

TRANSPARENCY & TRACEABILITY

BEST PRACTICE HIGHLIGHTS

Nudie Jeans – Sharing Auditing Results

Sharing a public supplier list is a valuable first step in transparency for a fashion company, but *Nudie Jeans Co. (Nudie Jeans)* has gone even further, sharing summaries of audit reports for final stage suppliers and subcontractors through their Production Guide. This is an important step in letting customers, journalists, and civil society organisations understand what issues are arising, not only generally across the *Nudie Jeans* supply chain, but in specific facilities.

When a company identifies non-compliances in its facilities, it can be difficult to share their findings publicly for fear of being condemned. However, we know that human rights issues exist within every supply chain and it is to be commended when a company has a system to identify and remediate non-compliance. *Nudie Jeans'* audit summaries give a brief look at some of the positives and negatives at each audited facility. They also include a time frame for resolution of corrective action plans.

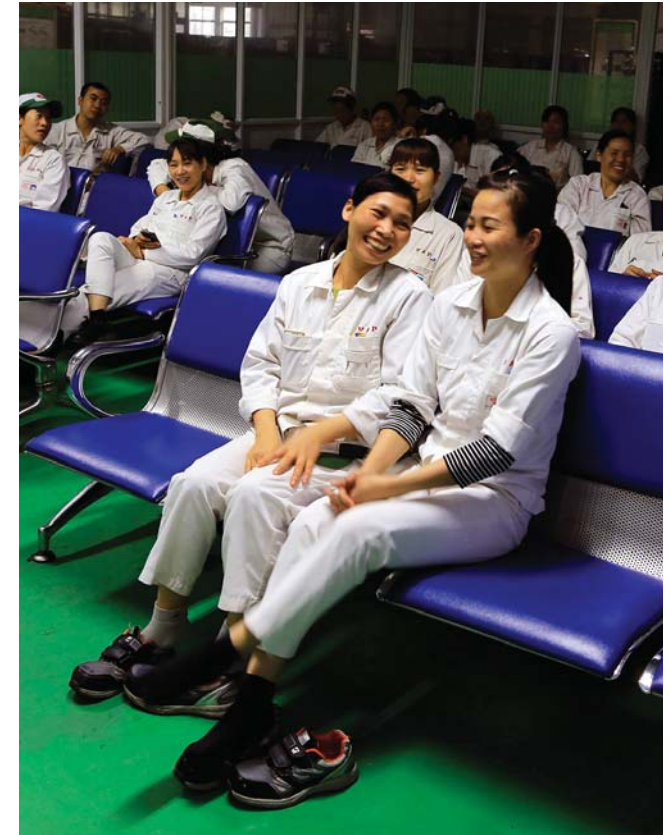
Nudie Jeans is one of several companies in our research sharing auditing results. Other companies sharing through the Fair Labor Association include *Gildan, Fruit of the Loom, Hanesbrands, New Balance, Nike, Patagonia, adidas, Hugo Boss, Puma, PVH Corp, Kathmandu,* and *UNIQLO*.

Nike – A New Benchmark for Supplier Lists

Nike is setting best practice in transparent supplier lists. Whilst many companies share the names and addresses of suppliers, *Nike's* Manufacturing Map shares a plethora of data points. This includes the parent company, number of employees, number of line workers, percentage of female workers, percentage of migrant workers, product type produced in the facility, contact details at the facilities producing collegiate products (name, phone number, email) and subcontractors.

The data can be accessed through an interactive map on their website or it can be exported in many formats. This makes searching through data and conducting analysis easier for journalists, researchers, and other individuals looking for robust data on *Nike* or supply chains in general.

This year The Research Team asked companies whether they were publishing additional data on their facilities, including the type of products made, percentage of female workers at each site or the date of last audit. Companies that were able to demonstrate the publication of additional data on three of the seven indicators for their final stage and inputs suppliers were: *Cotton On Group, Icebreaker, RREPP, Patagonia, Outland Denim, APG & Co,* and *Esprit*.



© ILO/Nguyen Viet Thanh, via <https://flic.kr/p/U5VuqH>



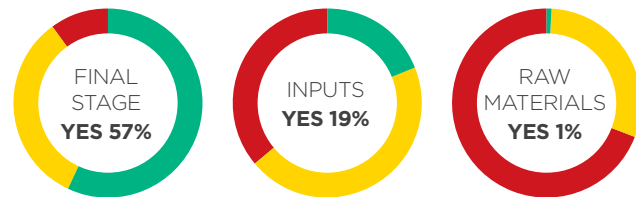
Auditing and Supplier Relationships

This section focusses on how a company manages its relationship with suppliers to ensure working conditions meet the standards set out in its policies. It evaluates audit processes, as well as training and other industry collaboration efforts that continue to support factories to better understand and provide decent working conditions.

AUDITING & SUPPLIER RELATIONSHIPS

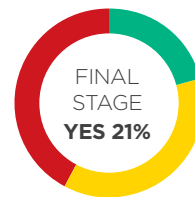
INDUSTRY OVERVIEW

What percentage of facilities are audited over a 2-year period by trained social auditors (internal and/or third party)?



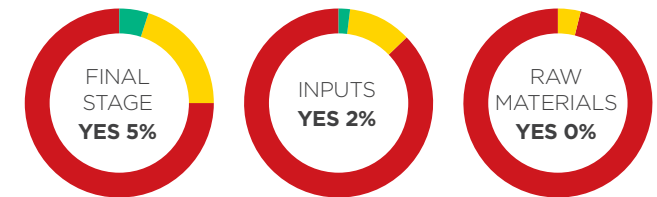
Once a company has traced the location of suppliers, audits are a useful tool to better understand the working conditions in their facilities, and to identify instances of worker exploitation. There is great diversity in the quality of audits and their capacity to effectively capture a true representation of working conditions. Brands can opt for third party or internal audits, and many use a combination of the two. Neither is necessarily better or worse than the other. Audits work best at improving working conditions when coupled with effective corrective action plans, strong supplier relationships, training programs on worker rights, and, perhaps most importantly, instruments to hear worker voice, like union engagement and effective grievance mechanisms. While it is good to see that over half of the companies surveyed know all of their final stage producers, only 1% know all of their raw material suppliers.

What percentage of companies audit a majority of final stage facilities with unannounced audits, anonymous worker surveys or off-site worker interviews per year?



Unannounced audits gain a more accurate picture of everyday operations in factories because factory managers, and others in positions of influence, have less warning time to hide abuses. Workers are also more likely to feel freer to express concerns about their workplace when they are interviewed offsite, and away from factory management, or surveyed anonymously. These three measures significantly affect the quality of audits conducted. Only 21% of companies reported auditing a majority of cut-make-trim facilities with either unannounced visits, offsite worker interviews, or anonymous worker surveys each year.

Are corrective action plans pertaining to wages and/or overtime resolved within 12 months?



Corrective action plans (CAPs) are the main tool used for driving compliance against audit standards. Too often however, CAPs are raised on the same series of issues, in repeated audits. Full and timely resolution of these CAPs remains elusive, particularly for issues pertaining to wages and overtime.

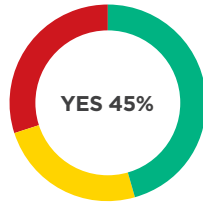
The findings of this report confirm this practice, with only 5% of companies able to demonstrate that when CAPs are raised regarding wage and overtime issues in their final stage facilities, they are resolved within 12 months.

Key: YES PARTIAL NO

AUDITING & SUPPLIER RELATIONSHIPS

INDUSTRY OVERVIEW

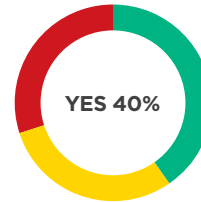
Does the company invest in training buyers and suppliers/factory managers, in order to increase awareness of human rights and health and safety risks?



Education and awareness are essential for bringing change to the industry. Buyers, suppliers and factory managers each play key roles in the supply chain and have the opportunity to both identify risks in supply chains and set terms to prevent them. Companies that provide human rights and risk training to their buyers, suppliers and factory managers increase their awareness of these issues, and their ability to prevent and address them where they may exist.

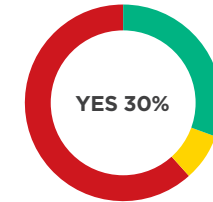
We are pleased to see 45% of surveyed companies invested in this training, with a further 24% gaining partial credit for some form of similar training program.

Does the company actively improve leverage and relationships with suppliers, through supplier consolidation and/or industry collaboration?



For brands to drive changes in working conditions in factories, it is critical that they build leverage and deepen supplier relationships. Relationships build trust and provide a secure environment for companies and suppliers to invest in improving working conditions. Increasing leverage by consolidating a company's supplier base, or by collaborating with others in the industry, improves the capacity for a company to advance positive change in the facilities it sources from. In contrast, pursuing short term contacts based only on price and product specifications can incentivise poor working conditions. We are encouraged to find that more than 70% of brands are taking steps to improve leverage and relationship.

Does that company have a preferred supplier program by which suppliers are incentivised by strong labour rights records?



Preferred supplier programs reward suppliers with additional orders, and longer relationships for performing against key performance criteria, including social criteria. These programs represent an effective tool for companies to drive ongoing labour rights improvements amongst its suppliers and to identify and strategically invest in those suppliers that are most able to uphold worker rights.

It is also a positive tool for suppliers, as it rewards their efforts to invest in workers, creating greater stability for them, and better conditions for their workers.

We're pleased to see that 30% of surveyed companies had a preferred supplier program that offered incentive to suppliers to have a strong labour rights record.

AUDITING & SUPPLIER RELATIONSHIPS

BEST PRACTICE HIGHLIGHTS

Cotton On – Strengthening Markets in Kenya

The 2015 Ethical Fashion Report highlighted *Cotton On Group's* (then) fledgling partnership with Business for Development and the Department of Foreign Affairs and Trade, to source sustainable cotton from Kenya. The initiative is based in the Kwale region, where poor soil management and low yields are a product of insufficient training in farming techniques.

The partnership brings together industry and government to grow smallholder farmer skills and knowledge, so they can produce cotton of a commercial quality. This cotton can then enter larger, global markets, growing the income of farmers in Kwale.

Women's economic empowerment is also a focus of the initiative, with women encouraged to take part in the program as landholding farmers, or as the primary person responsible for managing the crop.

Cotton On Group supports the program through funding the training and establishment of each farm. Through committing to purchase 100% of the cotton lint, it is giving farmers confidence that there will be a market for their crop. *Cotton On* reports that since they commenced the program in 2014, over 1,400 farmers have taken part, with many significantly increasing their income.

Participants have gained knowledge in essential areas including fair work issues, collective bargaining, equality and occupational health and safety; and environmental conservation practices such as pesticide usage, rotation cropping and cropping plans tied to anticipated rainfall patterns for their region. Smallholder farmers have also been guided to organise themselves into a functioning, democratic, cooperative structure that aggregates and sells their cotton.

Cotton On Group's efforts show how fashion companies can leverage their influence to support development projects, which work for business and also work for farmers.

Companies Resolving Overtime and Wage Issues

Despite auditing programs checking that wages are being paid to the legal minimum and no overtime is being worked beyond the legal or Code standard, overtime and wage issues persist in many facilities. In China, this is a large issue, with chronic overtime seeing some workers at their jobs for 12 hours a day, 30 days straight.

Communicating a Code of Conduct and auditing for compliance that is a vital part of understanding a company's supply chain, but in order to ensure worker rights are upheld, companies must use these assessments to see whether issues are being resolved quickly and on an ongoing basis.

A number of companies were able to demonstrate that they resolved corrective action plans in relation to wages and overtime within a 12 month period. The strongest performers, resolving over 75% of CAPs at final stage, were: *Anthea Crawford, Barkers, Cue, Freeset, Kmart, Lorna Jane, lululemon athletica, Outland Denim, Patagonia, and Target.*



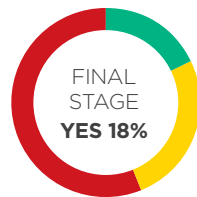
Worker Empowerment

This section focusses on how workers are empowered to make their collective voice heard in the supply chain through trade unions, collective bargaining agreements, and grievance mechanisms.

WORKER EMPOWERMENT

INDUSTRY OVERVIEW

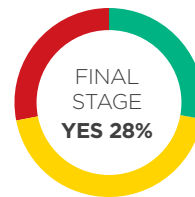
Are democratically elected unions in at least 50% of final stage facilities? (partial = some)



Freedom of association and the right to collective bargaining are together one of the ILO's Four Fundamental Principles and Rights at Work. Effective recognition of these rights empowers workers to negotiate decent working conditions and fairer wages. Disappointingly, too few facilities in the apparel industry actually have an effective, democratically elected trade union. This is a practical limit on the expression of the right to join or not join a worker representative body.

However, this is one of the most significant areas of improvement for the industry. 44% of companies reported tracking a union presence in some or all of their facilities, up from 24% in 2013. This is encouraging progress, but this still stands in sharp contrast to the 86% of companies whose policies uphold the right to freedom of association and collective bargaining. It appears that while auditors routinely ask workers if they feel they are free to express this right, companies are less robust in checking for the presence of avenues for workers to do so in practice.

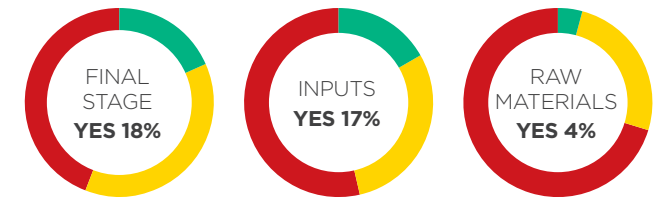
Does the company have a functioning grievance mechanism which workers can access anonymously and in their native language?



Grievance mechanisms enable workers to voice concerns about violations to their rights and safety and to remedy them within the factory. Many companies rightly ask factories to establish internal grievance mechanisms for workers to resolve complaints directly with their employers.

It is important that workers are additionally provided with an avenue to express their concerns to a third party, particularly since the factory may be responsible for the abuse and may have already refused to rectify it. An alternative avenue for raising grievances is also necessary because audits only capture a snapshot of what is occurring in factories. Of the companies assessed, 72% reported providing workers in a portion of their supply chain with access to some form of grievance mechanism.

Does the company have any systems or policies in place to rehabilitate child or forced labourers if discovered?



Documented cases of child and forced labour have been associated with every stage of the global fashion industry supply chain. It is important that brands have a remediation plan in place so that they are in a good position to respond to the risk of these worst forms of abuse occurring in their supply chain. If child labour is found, companies should, ideally, be prepared to find a way to remove them from the situation, provide for the child's education, and replace the lost income to the family. If forced labour is found, brands should facilitate the individual's reintegration into the labour market and transition to decent work with compensation for any unpaid wages. Of the companies assessed, 18% reported having systems or policies in place to rehabilitate child or forced labourers if they were discovered in their final stage facilities, with a further 38% reporting some less formal commitments to action in this area.

Key: YES PARTIAL NO

WORKER EMPOWERMENT

BEST PRACTICE HIGHLIGHTS

Collective Organising – Fairtrade farmer owned co-operatives

Collective bargaining is a well-established mechanism for factory workers to negotiate for their rights at work as a group and with improved bargaining power as a group. Collective organising through farmer co-operatives can also have benefits for cotton farmers at the other end of the supply chain.

While the cotton supply chain is long and complex, often, at the very end of it, are small scale farmers who produce for themselves on very small farm holdings. As such, they are vulnerable to environmental challenges and market price fluctuations. It is estimated that 100 million rural households that produce cotton are living in poverty.³⁵ On their own, they have little negotiating power when selling their fibre to middlemen or a ginner. It is not uncommon for farmers to have little choice but to sell their cotton at prices below the cost of production or to incur debt on unfavourable terms to purchase cotton-seed.

Fairtrade works with small scale farmers to create democratically run co-operatives around the world. The collective power of these groups improves their bargaining power with buyers and facilitates access to markets. Fairtrade works with Producer co-operatives to also facilitate training and information sharing to improve farming practices, thereby improving yields. They also disperse funds raised through the Fairtrade Premium, which protects incomes against the worst market price fluctuations, as do Fairtrade's

minimum prices, which are calculated to ensure that farmer incomes fully cover the costs of production.

As small business owners in their own right, there is no union that would play this role (in the way it does for factory workers, who can collectively organise to negotiate with factory management). However, the impact of collective organising in democratically run co-operatives, with the support of Fairtrade, is no less significant to improving farmers' income and welfare. Working together, farmers have more power and can learn from one another, helping them to create a prosperous future for themselves and their families.

It is estimated that 100 million rural cotton-producing households are living in poverty. Fairtrade offers one solution to improving farmer income.

Brands that were sourcing from Fairtrade farms in this year's report include: *Mighty Good Group*, *Etiko*, *RREPP*, *Common Good*, *Kowtow*, and *Freeset*.

Picking cotton is a slow manual process for farmers such as Kantaben, seen here working her family's farm plot. Both men and women work in the field during harvest in Gujarat, India. This Fairtrade cooperative in Gujarat, India has been working with Fairtrade since 2005, and is one that RREPP sources from. Since then their membership has grown from 50 farmers to over 500. The cooperative have chosen to invest their Fairtrade Premium funds in to water saving and education initiatives.

© Fairtrade ANZ/Sean Hawkey.



WORKER EMPOWERMENT

BEST PRACTICE HIGHLIGHTS

The BCI and *Cotton On Group's* Kwale Cotton Project also receive credit in the report for their collective farmer organisations.

Patagonia – Protecting Migrant Workers

Migrant workers who are living and working away from their homes are a particularly vulnerable group within the garment industry. They may be recruited to work in another country via an intermediary such as a labour agent. These agents can exploit the vulnerability of migrant workers through charging exorbitant recruitment fees that lead to debt bondage or withholding identity documents such as passports. Migrant workers are also at risk of human trafficking, particularly those who are desperate for work in the garment industry in order to lift themselves and their families out of poverty. *Patagonia's* migrant worker program is a leading example of how businesses can work proactively to monitor and mitigate the risks of human trafficking and other forms of migrant worker exploitation in their supply chains.

After their thorough auditing program identified worker-paid recruitment fees in Taiwanese mills in 2015, *Patagonia* set about developing more robust systems to prevent exploitation of foreign migrant workers. *Patagonia* has traced deep into their supply chain and is auditing their inputs suppliers, including mills. Due to their thorough monitoring system, *Patagonia* is well placed to identify problems throughout the life cycle of an employee's tenure, from recruitment to repatriation.

When migrant workers are employed, it is vital that companies and their suppliers know how to act to protect this vulnerable class of workers. *Patagonia* has an extensive supplier code of conduct, but their Migrant Worker Employment Standard (MWES) goes deeper to ensure fair and decent treatment of migrant workers to prevent egregious issues like recruitment fees, discrimination and forced labour from occurring. The MWES focuses on building robust human resources management systems. This includes conducting labour broker

due diligence and auditing, keeping records of fees paid by workers, and interviews with migrant workers to identify whether they have paid recruitment fees. The MWES was initially rolled out to *Patagonia's* material suppliers in Taiwan but has now been implemented throughout their supply chain, including finished goods factories.

Patagonia has been progressing implementation of the MWES, including rolling out their Roadmap to No Fees by 2020 at a supplier forum in Taiwan last year. The training equipped suppliers to understand the actions that they must take to ensure migrant workers are no longer paying recruitment fees to secure work.



Living Wage

This section explores the importance of paying a living wage, examining the state of the industry, including its efforts to assess what a living wage is for its workers and the proportion that are paying a living wage to their workers.

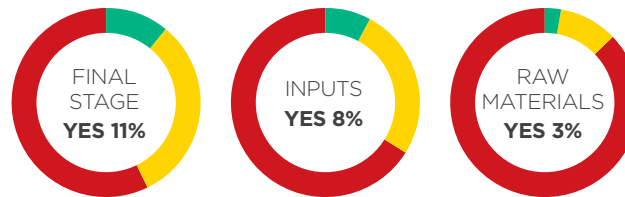
LIVING WAGE

INDUSTRY OVERVIEW

A living wage is one that allows for a worker to cover their family’s basic needs and have some discretionary income. Establishing a robust estimate will involve multi-stakeholder consultation. The payment of a living wage is perhaps the most important element in seeing the rights of workers upheld.

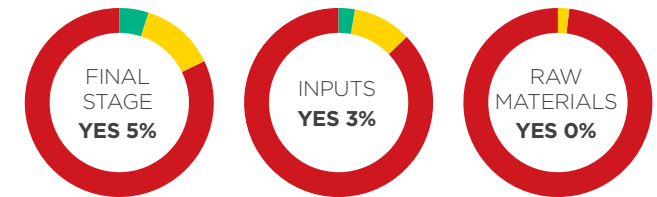
We believe adopting the methodology developed by former ILO economist Richard Anker for these calculations is an example of current industry best practice. However, as there isn’t currently ‘an Anker figure’ for all regions involved in garment manufacturing, we also support companies that have developed their own methods for calculating a living wage.

Has the brand developed a living wage methodology and calculated a living wage for each region that it operates in?



According to many companies, one of the most significant impediments towards paying garment industry workers a living wage is the absence of global consensus on how to define and calculate a living wage. Credit has been given to brands that adopt a methodology for themselves, particular to the regions their supply chain operates in, or for participating in a multi-stakeholder initiative towards this end. Collecting current wage data and having a living wage benchmark is a critical first step in understanding the ‘wage gap’ and directing efforts and investments to improve wages. It is encouraging to see that 43% of companies are taking some steps towards adopting a methodology for at least some of their supply chain.

Do all facilities pay a living wage to their workers? (partial credit = some facilities)



It is important that companies take active steps to improve worker incomes, as many countries set minimum wages below poverty levels, in the pursuit of attracting international business. A living wage is therefore an important measure to use in understanding what is fair for garment workers.

A living wage is generally understood to be one that allows for a worker to cover their family’s basic needs while also having some discretionary income to allow for emergencies. An important first step to achieving living wages is knowing what the ‘living wage level’ is in each region a company sources from. There is no universal number to use internationally and establishing a robust estimate will involve multi-stakeholder consultation.

Only one-in-twenty, or 5% of companies were able to show that they paid a living wage to all their final stage workers. A further 12% could show they paid this to a portion of their final stage workers.

LIVING WAGE

BEST PRACTICE HIGHLIGHTS

Hanesbrands

US company *Hanesbrands* is a leading performer on studying wage issues among the larger fashion retailers. More than 70% of its manufacturing volume comes from company-owned or dedicated facilities which are vertically integrated to include fabric production and sewing. Directly owning facilities allows *Hanesbrands* to invest in employees and their communities, which in turn strengthens the company's engagement with civil society, unions and others.

This business model has also made it easier for *Hanesbrands* to understand their workers' (and their families') living situation and what it takes for their households to meet their basic needs. From 2015 to 2017, the company commissioned expert economists to research *Hanesbrands*' owned facilities in three countries in Latin America, as well as Vietnam. The researchers conducted confidential interviews with workers to gather

quantitative data on worker and family income, their family situation, and a breakdown of their actual expenditures on key household items. With this research, *Hanesbrands* was able to show that in Vietnam and Latin America their employees are living in households that can meet their basic needs and more.

Where many other brands have relied on external wage benchmarks which to date only cover part of the global fashion supply chain, *Hanesbrands* has invested in research to understand wages and the cost of living across its directly owned network. The Research team applaud this company's thorough and well-reasoned efforts to understand the living situation and needs of its workers — and then pay them enough to both meet household expenses and save for the future.

10

Environment

While we did conduct preliminary research on environmental metrics with all companies included in this report, this was not included in final assessment and grading.

ENVIRONMENT METHODOLOGY

The Ethical Fashion Report has been driving continuous improvement in global fashion industry supply chains for five years. The Report's Methodology chapter outlined how, over time, its grading process has sought to push industry standards forward; strengthening companies' labour rights management systems. However, it also acknowledged that a truly "ethical" company not only ensures their supply chain empowers workers and pays them a living wage, it also understands its impact on the environment and manages its footprint to keep waterways, the earth, and the atmosphere healthy.

To this end, initial assessments of the industry's environmental management procedures and policies began this year. Companies were asked 11 questions (or "environmental metrics") which, themselves, were developed over a four-month period.

During this period, the impact of the fashion industry on the environment, the capacity of the industry to influence these impacts, and how the industry was currently managing its impact in Australia (and globally) was researched. The intent was to find metrics that were at the intersection of the industry's impact and influence. For this reason, existing environmental monitoring systems and certification schemes were also reviewed so that the assessment would support impactful initiatives already taken up by some companies, in addition to providing existing solutions for those companies only beginning the journey.

After developing an initial list of 40 metrics, The Research Team consulted with NGOs (including Alice Cope of UN Global Compact and Dawn McGregor of China Water Risk); sustainability and CSR specialists (including Lisa Heinze, Mans Sweeney of Ausbil and Yun Zheng of Elevate); and Australian and international fashion companies (to better understand their current environmental management systems), in order to narrow the metrics list down.

The final environmental metrics were:

1. Has the company undertaken an assessment of its environmental impacts and risks throughout its supply chain?
2. Has the company assessed the environmental impact of its top three fibres and materials used in its apparel products and implemented learnings from assessment into product design and production?
3. What percentage of the company's final product is made from sustainable fibres?
4. Has the company publicly announced net-zero carbon emissions reduction target by 2050 for its supply chain; or, is it lobbying for this target in the countries that it is operating in?
5. Does the company have a restricted substances list against which it tests compliance?
6. Does the company have a manufacturing restricted substances list against which it tests compliance?

7. For what percentage of water intensive facilities has the company collected and benchmarked water use data?
8. Has the company used the above data to implement a water use plan?
9. For what percentage of wet-processing facilities has the company collected wastewater quality data?
10. Of these, do all have wastewater improvement strategies?
11. Does the company make available to customers a take-back and/or repair program?

Outstanding Environmental Management

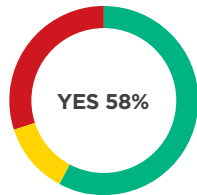
Overall, of the companies we gained preliminary data from, the following demonstrated strong performance against our metrics:

- Common Good
- Etiko
- Freetset
- H&M
- Icebreaker
- Kowtow
- Mighty Good Group
- Outland Denim
- Patagonia
- RREPP

ENVIRONMENT

INDUSTRY OVERVIEW

Does the company have a Restricted Substances List, against which it tests compliance?

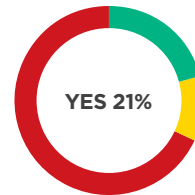


A Restricted Substances List (RSL), limits the chemicals present in a final product, such as a shirt or jeans. These are often a first step in chemical management, to ensure that consumers are not exposed to hazardous chemicals which may have been used in the manufacturing process.

Companies tend to have a basic form of RSL in order to protect consumers, comply with legislation in an importing country, or as a result of consumer pressure. The Research Team asked companies whether they were communicating an RSL to suppliers and whether they had a system to test supplier compliance with the list. For example, through product sample testing.

Among the companies that answered this initial environmental assessment, 70% of companies had an RSL, and 58% had an RSL and were testing for compliance with it.

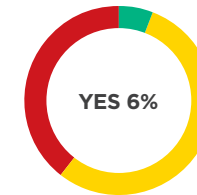
Does the company have a Manufacturing Restricted Substances List against which it tests compliance?



A Manufacturing Restricted Substances List (MRSL) defines the banned and restricted hazardous substances potentially used and discharged into the environment during manufacturing. These substances can affect the health of workers involved in manufacturing processes, and, if released into surrounding waterways, be harmful to people and environment near the facility and much farther afield.

Companies usually adopt MRSLs for application at wet-processing facilities, such as dye-houses and washing facilities. They test for compliance through chemical management systems (which may control the formulations and quantities of chemicals used), and by checking wastewater to ensure that the limits are being complied with. Many companies are asking their suppliers to take a continuous improvement approach, phasing out hazardous chemicals and using safer substitutes. 32% of companies reported that they had adopted an MRSL, with 21% testing facilities for compliance.

What percentage of the company's final product is made from sustainable fibres?



Many companies are taking a fibre-approach to reducing their environmental impact by exploring more sustainable materials and setting targets to increase the amount sourced.

Using a fibre-approach to manage environmental impact helps companies to influence their raw materials supply chain, even where they might be yet to trace to that level.

Initiatives such as the GOTS and BCI, when supported by companies, can promote better environmental practice through guarantees that a farm-level environmental standard is being implemented.

60% of companies were able to demonstrate that they were sourcing at least some sustainable fibres, including organic cotton, recycled cotton or polyester.

ENVIRONMENT

BEST PRACTICE HIGHLIGHTS

H&M: Detailed and Consistent Environmental Reporting

To better understand the environmental impact of its supply chain, H&M have rolled out the Higg Index 2.0 Facility Module (The Higg Index) to all final stage and many inputs suppliers.

The Higg Index, developed by the Sustainable Apparel Coalition (SAC), uses self-reporting to collect data on a range of technical issues including: water use, emissions to air, waste management, and wastewater.

The Higg Index focusses on assessing performance rather than checking compliance, allowing facilities and suppliers to use it as a learning tool. Data is collected to produce an environmental score, which H&M uses to understand the performance, risks, and opportunities for improvement of its many suppliers.

It uses this insight to engage with suppliers, communicating the business case for robust environmental performance and rewarding strong performers. By employing the same tool across suppliers, H&M can improve its ability to compare supplier performance, gather information consistently across data points, and identify overarching supply chain strengths and weaknesses.

Whilst The Higg Index is currently driven by self-assessment (supported by internal validation monitoring by *H&M*), the SAC has big plans for increasing the robustness and verification of the tool. The SAC is recruiting verifiers and trainers to check facility assessments and verify data, which will promote the credibility and quality of The Higg Index.

Global Organic Textile Standard

The Global Organic Textile Standard (GOTS) is a leading certification system in ensuring the organic status of textiles, along with environmentally and socially responsible manufacturing. The standard applies at final stage and inputs facilities, particularly in textile processing and manufacturing.

In 2017, there were over 5,000 GOTS certified facilities in 62 countries. Together, these facilities employed more than 1.74 million people; and so, have a huge potential to create positive change in the textile industry.

Key provisions in the standard include a ban on highly hazardous chemicals, child labour, and the use of Genetically Modified Organisms. GOTS is also particularly strong on environmental outcomes.

The standard requires that facilities monitor water use, waste, energy, chemical use, and wastewater, in addition to setting goals for improvement.

GOTS facilities follow strict wastewater treatment practices and are tested for compliance against restricted substances (both within the supply chain and in their finished goods) to minimise harm to the environment, workers, and consumers.

Certified textiles must contain at least 70% organic fibres and cannot be blended with conventional cotton, angora, or virgin polyester due to their significant environmental impact.

The provisions in the standard have substantial positive environmental and social impacts,

Our preliminary research found that the GOTS certification effectively addresses many of the environmental considerations that we considered in our proposed environmental metrics.

Some of the companies sourcing from GOTS-certified facilities and ensuring robust environmental management in their supply chains are: *Outland Denim*, *Freeset*, *Mighty Good Group*, *Etiko*, *Common Good*, *Kowtow*, and *RREPP*.

11

Brand Index

This section lists grades for the 407 brands associated with the 114 companies assessed in this report. While some companies assessed are a single-brand company, others hold multiple brands.

BRAND INDEX

GRADES BY COMPANY

A-B

* = non-responsive companies

| Parent Company | Brand | Grade |
|----------------------|----------------------|-------|
| Abercrombie & Fitch* | Abercrombie & Fitch* | D |
| Abercrombie & Fitch* | Abercrombie Kids* | D |
| Abercrombie & Fitch* | Gilly Hicks* | D |
| Abercrombie & Fitch* | Hollister Co.* | D |
| adidas | adidas | A- |
| adidas | Reebok | A- |
| ALDI Stores | Aldi | C- |
| ALDI Stores | Barely Basics | C- |
| ALDI Stores | Barely Essentials | C- |
| ALDI Stores | Crane | C- |
| ALDI Stores | Crane Performance | C- |
| ALDI Stores | Crane Snow Extreme | C- |
| ALDI Stores | Higgledee | C- |
| ALDI Stores | Higgledee Baby | C- |
| ALDI Stores | INOC | C- |
| ALDI Stores | L&D | C- |
| ALDI Stores | Lily & Dan | C- |
| ALDI Stores | Serra | C- |
| ALDI Stores | Torque | C- |
| ALDI Stores | West Bay | C- |
| ALDI Stores | Workzone | C- |
| Ally Fashion* | Ally* | F |
| Anthea Crawford* | Anthea Crawford* | C |
| APG & Co. | JAG | A- |
| APG & Co. | SABA | A- |
| APG & Co. | Sportscraft | A- |
| Arcadia Group | Burton Menswear | C+ |
| Arcadia Group | Dorothy Perkins | C+ |
| Arcadia Group | Evans | C+ |

| Parent Company | Brand | Grade |
|-----------------------|----------------|-------|
| Arcadia Group | Ivy Park | C+ |
| Arcadia Group | Miss Selfridge | C+ |
| Arcadia Group | Outfit | C+ |
| Arcadia Group | Outfit Kids | C+ |
| Arcadia Group | Topman | C+ |
| Arcadia Group | Topshop | C+ |
| Arcadia Group | Wallis | C+ |
| AS Colour | AS Colour | C+ |
| ASICS | ASICS | C+ |
| ASICS | ASICS Tiger | C+ |
| ASICS | HAGLOFS | C+ |
| ASICS | Onitsuka Tiger | C+ |
| ASOS | ASOS | B+ |
| Bardot | Bardot | D |
| Bardot | Bardot Junior | D |
| Barkers Clothing | Barkers | C+ |
| Ben Sherman Australia | Ben Sherman | C- |
| Best & Less | Best & Less | C |
| Betts Group | Airflex | D- |
| Betts Group | Betts | D- |
| Betts Group | Betts Kids | D- |
| Big W | Avella | C |
| Big W | B Active | C |
| Big W | B Athletic | C |
| Big W | B Collection | C |
| Big W | Big W | C |
| Big W | Blacksmith | C |
| Big W | Circuit | C |
| Big W | Denim 1964 | C |

| Parent Company | Brand | Grade |
|-----------------------------|-------------------|-------|
| Big W | Emerson | C |
| Big W | Hinterland | C |
| Big W | Joe & Co | C |
| Big W | Lyla & Co | C |
| Big W | Michelle Bridges | C |
| Big W | Wave Zone | C |
| Billabong | Billabong | C |
| Billabong | Element | C |
| Billabong | Honolua Surf Co. | C |
| Billabong | Kustom | C |
| Billabong | Palmers | C |
| Billabong | RVCA | C |
| Billabong | VonZipper | C |
| Billabong | Xcel | C |
| Bloch* | Bloch* | F |
| Blue Illusion | Blue Illusion | D |
| Boden | Boden | C |
| Boohoo | boohoo | D |
| Boohoo | boohooMAN | D |
| Boohoo | Nasty Gal | D |
| Boohoo | PrettyLittleThing | D |
| Brand Collective (apparel) | Elka Collective | C |
| Brand Collective (apparel) | Elwood | C |
| Brand Collective (apparel) | Mossimo | C |
| Brand Collective (footwear) | Clarks | C+ |
| Brand Collective (footwear) | Grosby | C+ |
| Brand Collective (footwear) | Hush Puppies | C+ |
| Brand Collective (footwear) | Julius Marlow | C+ |
| Brand Collective (footwear) | Volley | C+ |

BRAND INDEX

GRADES BY COMPANY

B-H

* = non-responsive companies

| Parent Company | Brand | Grade |
|---------------------------------|--------------------------------|-------|
| Bras N Things* | Bras N Things* | F |
| Coles | Mix | C |
| Common Good | Common Good | A+ |
| Common Good | Liminal Apparel | A+ |
| Cotton On Group | Cotton On | A |
| Cotton On Group | Cotton On Body | A |
| Cotton On Group | Cotton On Kids | A |
| Cotton On Group | Factorie | A |
| Cotton On Group | Rubi | A |
| Cotton On Group | Supré | A |
| Country Road Group | Country Road | A- |
| Country Road Group | MIMCO | A- |
| Country Road Group | Trenery | A- |
| Country Road Group | Witchery | A- |
| Cue Clothing Co. | Cue | C |
| Cue Clothing Co. | Veronika Maine | C |
| David Jones | Agenda | B- |
| David Jones | Alta Linea | B- |
| David Jones | David Jones | B- |
| David Jones | David Jones Classic Collection | B- |
| David Jones | David Jones Junior | B- |
| David Jones | Milana | B- |
| David Jones | Organic Baby by David Jones | B- |
| David Jones | St James | B- |
| De Vere Textiles (RUBY Apparel) | Liam | D+ |
| De Vere Textiles (RUBY Apparel) | RUBY | D+ |
| Decjuba* | Decjuba* | F |
| Decjuba* | D-Luxe Basics by Decjuba* | F |
| Designworks Clothing Co. | B.O.D | C |

| Parent Company | Brand | Grade |
|--------------------------|--------------------|-------|
| Designworks Clothing Co. | Mooks | C |
| Designworks Clothing Co. | Republic | C |
| Designworks Clothing Co. | Sista | C |
| Esprit | edc | B+ |
| Esprit | Esprit | B+ |
| Etiko | Etiko | A+ |
| Ezibuy | Capture | D+ |
| Ezibuy | Emerge | D+ |
| Ezibuy | EziBuy | D+ |
| Ezibuy | Grace Hill | D+ |
| Ezibuy | Sara | D+ |
| Ezibuy | Urban | D+ |
| Factory X | Alannah Hill | C+ |
| Factory X | Autonomy | C+ |
| Factory X | Dangerfield | C+ |
| Factory X | Jack London | C+ |
| Factory X | Lu'rv | C+ |
| Factory X | Princess Highway | C+ |
| Factory X | Revival | C+ |
| Farmers* | Farmers* | D- |
| Fast Future Brands | Mirrou | D |
| Fast Future Brands | TEMT | D |
| Fast Future Brands | Valleygirl | D |
| Forever 21 | Forever 21 | D |
| Forever New | Forever New | B- |
| Freaset | Freaset | A+ |
| Fruit of the Loom* | Fruit of the Loom* | D+ |
| Fruit of the Loom* | Russell Athletic* | D+ |
| Fruit of the Loom* | Spalding* | D+ |

| Parent Company | Brand | Grade |
|------------------------------|----------------------|-------|
| Fruit of the Loom* | Vanity Fair* | D+ |
| Gap Inc. | Athleta | B- |
| Gap Inc. | Banana Republic | B- |
| Gap Inc. | GAP | B- |
| Gap Inc. | Intermix | B- |
| Gap Inc. | Old Navy | B- |
| Gap Inc. | Weddington Way | B- |
| Gazal* | Bisley* | D- |
| Gazal* | Gazal* | D- |
| General Pants Group | Alice in the Eve | C+ |
| General Pants Group | Arvust | C+ |
| General Pants Group | BNWR | C+ |
| General Pants Group | Candidate | C+ |
| General Pants Group | Don't Ask Amanda | C+ |
| General Pants Group | GP Co Basics | C+ |
| General Pants Group | GP Tees | C+ |
| General Pants Group | Insight | C+ |
| General Pants Group | Ksubi | C+ |
| General Pants Group | Neon Hart | C+ |
| General Pants Group | Standard | C+ |
| General Pants Group | Subtitled | C+ |
| Gildan Activewear | American Apparel | B+ |
| Gildan Activewear | Gildan | B+ |
| Gorman | Gorman | C+ |
| H&M | Cheap Monday | B+ |
| H&M | COS | B+ |
| H&M | H&M | B+ |
| Hallenstein Glasson Holdings | Glassons | B+ |
| Hallenstein Glasson Holdings | Hallenstein Brothers | B+ |

BRAND INDEX

GRADES BY COMPANY

H-M

* = non-responsive companies

| Parent Company | Brand | Grade |
|------------------|------------------|-------|
| Hanesbrands | Actil | A- |
| Hanesbrands | Bali | A- |
| Hanesbrands | Barely There | A- |
| Hanesbrands | Berlei | A- |
| Hanesbrands | Bonds | A- |
| Hanesbrands | C9 by Champion | A- |
| Hanesbrands | Champion | A- |
| Hanesbrands | DIM | A- |
| Hanesbrands | Explorer | A- |
| Hanesbrands | Gear for Sports | A- |
| Hanesbrands | GTM | A- |
| Hanesbrands | Hanes | A- |
| Hanesbrands | Hestia | A- |
| Hanesbrands | Jockey | A- |
| Hanesbrands | Kayser (hosiery) | A- |
| Hanesbrands | Knights Apparel | A- |
| Hanesbrands | Maidenform | A- |
| Hanesbrands | Platinum | A- |
| Hanesbrands | Playtex | A- |
| Hanesbrands | Razzamatazz | A- |
| Hanesbrands | Red Robin | A- |
| Hanesbrands | Rio | A- |
| Hanesbrands | Sheer Relief | A- |
| Hanesbrands | Sheridan | A- |
| Hanesbrands | Voodoo | A- |
| Hanesbrands | Wonderbra | A- |
| House of Quirky* | AndCo* | F |
| House of Quirky* | Evil Twin* | F |
| House of Quirky* | MINKPINK* | F |

| Parent Company | Brand | Grade |
|--------------------|-------------------|-------|
| House of Quirky* | Somedays Lovin** | F |
| House of Quirky* | Staple the Label* | F |
| Hugo Boss Group | BOSS | C+ |
| Hugo Boss Group | BOSS GREEN | C+ |
| Hugo Boss Group | BOSS ORANGE | C+ |
| Hugo Boss Group | HUGO | C+ |
| Icebreaker | Icebreaker | A+ |
| Inditex | Zara | A- |
| Inditex | Zara Home | A- |
| Industrie Clothing | ABCD Indie | B+ |
| Industrie Clothing | Indie | B+ |
| Industrie Clothing | Indie & Co | B+ |
| Industrie Clothing | Industrie | B+ |
| Jeanswest | Jeanswest | B+ |
| Jets | Jets | C |
| Just Group | Dotti | C+ |
| Just Group | Jacqui E | C+ |
| Just Group | Jay Jays | C+ |
| Just Group | Just Jeans | C+ |
| Just Group | Peter Alexander | C+ |
| Just Group | Portmans | C+ |
| K&K* | K&K* | F |
| Karen Walker* | Karen Walker* | C |
| Kathmandu | Kathmandu | A |
| Kmart Australia | Kmart | B+ |
| Kookai | Kookai | B- |
| Kowtow Clothing | Kowtow | A |
| L Brands* | Henri Bendel* | D+ |
| L Brands* | La Senza* | D+ |

| Parent Company | Brand | Grade |
|----------------------|-------------------------------|-------|
| L Brands* | PINK* | D+ |
| L Brands* | Victoria's Secret* | D+ |
| Lacoste | Lacoste | D+ |
| Levi Strauss & Co* | Dockers* | B- |
| Levi Strauss & Co* | Levi's* | B- |
| Lorna Jane | Lorna Jane | C |
| Lowes* | Beare & Ley* | D- |
| Lowes* | Lowes* | D- |
| Lululemon Athletica | Lululemon Athletica | A- |
| Macpac | Macpac | B |
| Marks & Spencer | Marks & Spencer | B |
| Max* | Max* | D+ |
| Mighty Good Group | Audrey Blue | A+ |
| Mighty Good Group | Mighty Good Undies | A+ |
| Munro Footwear Group | Cinori | D |
| Munro Footwear Group | Colorado | D |
| Munro Footwear Group | Corelli | D |
| Munro Footwear Group | Diana Ferrari | D |
| Munro Footwear Group | Django & Juliette | D |
| Munro Footwear Group | Gamins | D |
| Munro Footwear Group | I Love Billy | D |
| Munro Footwear Group | Isabelle Rossi | D |
| Munro Footwear Group | Lynx | D |
| Munro Footwear Group | Midas | D |
| Munro Footwear Group | Mollini | D |
| Munro Footwear Group | Silent D by Django & Juliette | D |
| Munro Footwear Group | Supersoft by Diana Ferrari | D |
| Munro Footwear Group | Top End | D |
| Munro Footwear Group | Wanted | D |

BRAND INDEX

GRADES BY COMPANY

M-T

* = non-responsive companies

| Parent Company | Brand | Grade |
|-----------------|----------------------|-------|
| Myer | Basque | C+ |
| Myer | Blaq | C+ |
| Myer | David Lawrence | C+ |
| Myer | Marc's | C+ |
| Myer | Milkshake | C+ |
| Myer | Miss Shop | C+ |
| Myer | Myer | C+ |
| Myer | Piper | C+ |
| Myer | Regatta | C+ |
| Myer | Reserve | C+ |
| Myer | Sass & Bide | C+ |
| Myer | Sprout | C+ |
| New Balance | New Balance | B |
| Next | Label/Mix | B- |
| Next | Lipsy London | B- |
| Next | Next | B- |
| Nike | Converse | B- |
| Nike | Hurley International | B- |
| Nike | Jordan | B- |
| Nike | Nike | B- |
| Noni B Group | beme | D+ |
| Noni B Group | Liz Jordan | D+ |
| Noni B Group | Noni B | D+ |
| Noni B Group | Rockmans | D+ |
| Noni B Group | Table Eight | D+ |
| Noni B Group | W. Lane | D+ |
| Nudie Jeans Co. | Nudie Jeans | A- |
| Outland Denim | Outland Denim | A+ |
| Oxford | Oxford | D |

| Parent Company | Brand | Grade |
|-------------------------|----------------------|-------|
| Patagonia | Patagonia | A |
| Pavement United Brands* | Coco Beach* | F |
| Pavement United Brands* | Lemonade* | F |
| Pavement United Brands* | Pavement* | F |
| Pavement United Brands* | Petals* | F |
| Pavement United Brands* | Pom Pom* | F |
| Pavement United Brands* | Scram* | F |
| Pavement United Brands* | Wax Bros.* | F |
| Pavement United Brands* | Zom-B Denim Co.* | F |
| Postie+ | Postie+ | C |
| Puma | Cobra Golf | B |
| Puma | Puma | B |
| PVH Corp* | ARROW* | B- |
| PVH Corp* | Calvin Klein* | B- |
| PVH Corp* | IZOD* | B- |
| PVH Corp* | Olga* | B- |
| PVH Corp* | Speedo* | B- |
| PVH Corp* | Tommy Hilfiger* | B- |
| PVH Corp* | Van Heusen* | B- |
| PVH Corp* | Warner's* | B- |
| R.M. Williams | R.M. Williams | B |
| Ralph Lauren* | Club Monaco* | D+ |
| Ralph Lauren* | Lauren Ralph Lauren* | D+ |
| Ralph Lauren* | Polo Ralph Lauren* | D+ |
| Ralph Lauren* | Ralph Lauren* | D+ |
| Retail Apparel Group | Connor | C+ |
| Retail Apparel Group | Johnny Bigg | C+ |
| Retail Apparel Group | Rockwear | C+ |
| Retail Apparel Group | Tarocash | C+ |

| Parent Company | Brand | Grade |
|-------------------------|--------------------|-------|
| Retail Apparel Group | yd. | C+ |
| Rip Curl | Rip Curl | B+ |
| Rodd & Gunn | Rodd & Gunn | B |
| Roger David | Roger David | D- |
| RREPP | RREPP | A |
| Seafolly Australia | Seafolly | B- |
| Seed Heritage | Seed Heritage | C- |
| Simon de Winter Group | Darn Tough | D+ |
| Simon de Winter Group | Fine Lines | D+ |
| Simon de Winter Group | Kayser (underwear) | D+ |
| Simon de Winter Group | Simon de Winter | D+ |
| Specialty Fashion Group | Autograph | C+ |
| Specialty Fashion Group | City Chic | C+ |
| Specialty Fashion Group | Crossroads | C+ |
| Specialty Fashion Group | Katies | C+ |
| Specialty Fashion Group | Millers | C+ |
| Specialty Fashion Group | Rivers | C+ |
| Sussan Group | Sportsgirl | C+ |
| Sussan Group | Sussan | C+ |
| Sussan Group | Suzanne Grae | C+ |
| T&T* | T&T* | F |
| Target Australia | Target | B |
| THE ICONIC* | Atmos&Here* | D+ |
| THE ICONIC* | Dazie* | D+ |
| THE ICONIC* | Double Oak Mills* | D+ |
| THE ICONIC* | H-Wood* | D+ |
| THE ICONIC* | Spurr* | D+ |
| THE ICONIC* | Staple Superior* | D+ |
| The PAS Group | Black Pepper | C- |

BRAND INDEX

GRADES BY COMPANY

T-Z

* = non-responsive companies

| Parent Company | Brand | Grade |
|----------------------|-------------------|-------|
| The PAS Group | Breakaway | C- |
| The PAS Group | Equus | C- |
| The PAS Group | Extra Pepper | C- |
| The PAS Group | Marco Polo | C- |
| The PAS Group | Review | C- |
| The PAS Group | Yarra Trail | C- |
| The Warehouse Group* | Active Intent* | C |
| The Warehouse Group* | Amco* | C |
| The Warehouse Group* | A'nD* | C |
| The Warehouse Group* | Back Country* | C |
| The Warehouse Group* | Basics Brand* | C |
| The Warehouse Group* | Basics Maternity* | C |
| The Warehouse Group* | Beach Works* | C |
| The Warehouse Group* | Blue Denim Co* | C |
| The Warehouse Group* | Debut* | C |
| The Warehouse Group* | Garage* | C |
| The Warehouse Group* | H&H* | C |
| The Warehouse Group* | Intrepid* | C |
| The Warehouse Group* | Kate Madison* | C |
| The Warehouse Group* | Match* | C |
| The Warehouse Group* | Maya* | C |
| The Warehouse Group* | Navigator South* | C |
| The Warehouse Group* | Pickaberry* | C |
| The Warehouse Group* | Rivet* | C |
| The Warehouse Group* | Schooltex* | C |
| The Warehouse Group* | The Warehouse* | C |
| The Warehouse Group* | Urban Equip* | C |
| The Warehouse Group* | Young Original* | C |
| Tigerlily* | Tigerlily* | D |
| Tree of Life | Tree of Life | C |

| Parent Company | Brand | Grade |
|--------------------------|----------------------|-------|
| Trelise Cooper* | Cooper* | F |
| Trelise Cooper* | Trelise Cooper Kids* | F |
| Trelise Cooper* | Trelise Cooper* | F |
| UNIQLO* | UNIQLO* | D+ |
| VF Corp | Bulwark | B |
| VF Corp | Eagle Creek | B |
| VF Corp | Eastpak | B |
| VF Corp | Horace Small | B |
| VF Corp | Jansport | B |
| VF Corp | Kipling | B |
| VF Corp | Lee | B |
| VF Corp | Majestic | B |
| VF Corp | Napapijri | B |
| VF Corp | Nautica | B |
| VF Corp | Red Kap | B |
| VF Corp | Reef | B |
| VF Corp | Riders by Lee | B |
| VF Corp | Rock & Republic | B |
| VF Corp | Rustler | B |
| VF Corp | Smartwool | B |
| VF Corp | The North Face | B |
| VF Corp | Timberland | B |
| VF Corp | Vans | B |
| VF Corp | Wrangler | B |
| Voyager Distributing Co* | Jump* | F |
| Voyager Distributing Co* | Kachel* | F |
| Voyager Distributing Co* | Ping Pong* | F |
| Wish Designs* | Wish* | F |
| Zimmermann | Zimmermann | C+ |

BRAND INDEX

GRADES BY BRAND

A-C

* = non-responsive companies

| Brand | Parent Company | Grade |
|----------------------|-------------------------|-------|
| ABCD Indie | Industrie Clothing | B+ |
| Abercrombie & Fitch* | Abercrombie & Fitch* | D |
| Abercrombie Kids* | Abercrombie & Fitch* | D |
| Actil | Hanesbrands | A- |
| Active Intent* | The Warehouse Group* | C |
| adidas | adidas | A- |
| Agenda | David Jones | B- |
| Airflex | Betts Group | D- |
| Alannah Hill | Factory X | C+ |
| Aldi | ALDI Stores | C- |
| Alice in the Eve | General Pants Group | C+ |
| Ally* | Ally Fashion* | F |
| Alta Linea | David Jones | B- |
| Amco* | The Warehouse Group* | C |
| American Apparel | Gildan Activewear | B+ |
| A'nD* | The Warehouse Group* | C |
| AndCo* | House of Quirky* | F |
| Anthea Crawford* | Anthea Crawford* | C |
| ARROW* | PVH Corp* | B- |
| Arvust | General Pants Group | C+ |
| AS Colour | AS Colour | C+ |
| ASICS | ASICS | C+ |
| ASICS Tiger | ASICS | C+ |
| ASOS | ASOS | B+ |
| Athleta | Gap Inc. | B- |
| Atmos&Here* | THE ICONIC* | D+ |
| Audrey Blue | Mighty Good Group | A+ |
| Autograph | Specialty Fashion Group | C+ |
| Autonomy | Factory X | C+ |

| Brand | Parent Company | Grade |
|-------------------|--------------------------|-------|
| Avella | Big W | C |
| B Active | Big W | C |
| B Athletic | Big W | C |
| B Collection | Big W | C |
| B.O.D | Designworks Clothing Co. | C |
| Back Country* | The Warehouse Group* | C |
| Bali | Hanesbrands | A- |
| Banana Republic | Gap Inc. | B- |
| Bardot | Bardot | D |
| Bardot Junior | Bardot | D |
| Barely Basics | ALDI Stores | C- |
| Barely Essentials | ALDI Stores | C- |
| Barely There | Hanesbrands | A- |
| Barkers | Barkers Clothing | C+ |
| Basics Brand* | The Warehouse Group* | C |
| Basics Maternity* | The Warehouse Group* | C |
| Basque | Myer | C+ |
| Beach Works* | The Warehouse Group* | C |
| Beare & Ley* | Lowes* | D- |
| beme | Noni B Group | D+ |
| Ben Sherman | Ben Sherman Australia | C- |
| Berlei | Hanesbrands | A- |
| Best & Less | Best & Less | C |
| Betts | Betts Group | D- |
| Betts Kids | Betts Group | D- |
| Big W | Big W | C |
| Billabong | Billabong | C |
| Bisley* | Gazal* | D- |
| Black Pepper | The PAS Group | C- |

| Brand | Parent Company | Grade |
|-----------------|-----------------------------|-------|
| Blacksmith | Big W | C |
| Blaq | Myer | C+ |
| Bloch* | Bloch* | F |
| Blue Denim Co* | The Warehouse Group* | C |
| Blue Illusion | Blue Illusion | D |
| BNWR | General Pants Group | C+ |
| Boden | Boden | C |
| Bonds | Hanesbrands | A- |
| boohoo | Boohoo | D |
| boohooMAN | Boohoo | D |
| BOSS | Hugo Boss Group | C+ |
| BOSS GREEN | Hugo Boss Group | C+ |
| BOSS ORANGE | Hugo Boss Group | C+ |
| Bras N Things* | Bras N Things* | F |
| Breakaway | The PAS Group | C- |
| Bulwark | VF Corp | B |
| Burton Menswear | Arcadia Group | C+ |
| C9 by Champion | Hanesbrands | A- |
| Calvin Klein* | PVH Corp* | B- |
| Candidate | General Pants Group | C+ |
| Capture | Ezibuy | D+ |
| Champion | Hanesbrands | A- |
| Cheap Monday | H&M | B+ |
| Cinori | Munro Footwear Group | D |
| Circuit | Big W | C |
| City Chic | Specialty Fashion Group | C+ |
| Clarks | Brand Collective (footwear) | C+ |
| Club Monaco* | Ralph Lauren* | D+ |
| Cobra Golf | Puma | B |

BRAND INDEX

GRADES BY BRAND

C-H

* = non-responsive companies

| Brand | Parent Company | Grade |
|--------------------------------|-------------------------|-------|
| Coco Beach* | Pavement United Brands* | F |
| Colorado | Munro Footwear Group | D |
| Common Good | Common Good | A+ |
| Connor | Retail Apparel Group | C+ |
| Converse | Nike | B- |
| Cooper* | Trelise Cooper* | F |
| Corelli | Munro Footwear Group | D |
| COS | H&M | B+ |
| Cotton On | Cotton On Group | A |
| Cotton On Body | Cotton On Group | A |
| Cotton On Kids | Cotton On Group | A |
| Country Road | Country Road Group | A- |
| Crane | ALDI Stores | C- |
| Crane Performance | ALDI Stores | C- |
| Crane Snow Extreme | ALDI Stores | C- |
| Crossroads | Specialty Fashion Group | C+ |
| Cue | Cue Clothing Co. | C |
| Dangerfield | Factory X | C+ |
| Darn Tough | Simon de Winter Group | D+ |
| David Jones | David Jones | B- |
| David Jones Classic Collection | David Jones | B- |
| David Jones Junior | David Jones | B- |
| David Lawrence | Myer | C+ |
| Dazie* | THE ICONIC* | D+ |
| Debut* | The Warehouse Group* | C |
| Decjuba* | Decjuba* | F |
| Denim 1964 | Big W | C |
| Diana Ferrari | Munro Footwear Group | D |
| DIM | Hanesbrands | A- |

| Brand | Parent Company | Grade |
|---------------------------|----------------------------|-------|
| Django & Juliette | Munro Footwear Group | D |
| D-Luxe Basics by Decjuba* | Decjuba* | F |
| Dockers* | Levi Strauss & Co* | B- |
| Don't Ask Amanda | General Pants Group | C+ |
| Dorothy Perkins | Arcadia Group | C+ |
| Dotti | Just Group | C+ |
| Double Oak Mills* | THE ICONIC* | D+ |
| Eagle Creek | VF Corp | B |
| Eastpak | VF Corp | B |
| edc | Esprit | B+ |
| Element | Billabong | C |
| Elka Collective | Brand Collective (apparel) | C |
| Elwood | Brand Collective (apparel) | C |
| Emerge | Ezibuy | D+ |
| Emerson | Big W | C |
| Equus | The PAS Group | C- |
| Esprit | Esprit | B+ |
| Etiko | Etiko | A+ |
| Evans | Arcadia Group | C+ |
| Evil Twin* | House of Quirky* | F |
| Explorer | Hanesbrands | A- |
| Extra Pepper | The PAS Group | C- |
| EziBuy | Ezibuy | D+ |
| Factorie | Cotton On Group | A |
| Farmers* | Farmers* | D- |
| Fine Lines | Simon de Winter Group | D+ |
| Forever 21 | Forever 21 | D |
| Forever New | Forever New | B- |
| Freeset | Freeset | A+ |

| Brand | Parent Company | Grade |
|----------------------|------------------------------|-------|
| Fruit of the Loom* | Fruit of the Loom* | D+ |
| Gamins | Munro Footwear Group | D |
| GAP | Gap Inc. | B- |
| Garage* | The Warehouse Group* | C |
| Gazal* | Gazal* | D- |
| Gear for Sports | Hanesbrands | A- |
| Gildan | Gildan Activewear | B+ |
| Gilly Hicks* | Abercrombie & Fitch* | D |
| Glassons | Hallenstein Glasson Holdings | B+ |
| Gorman | Gorman | C+ |
| GP Co Basics | General Pants Group | C+ |
| GP Tees | General Pants Group | C+ |
| Grace Hill | Ezibuy | D+ |
| Grosby | Brand Collective (footwear) | C+ |
| GTM | Hanesbrands | A- |
| H&H* | The Warehouse Group* | C |
| H&M | H&M | B+ |
| HAGLOFS | ASICS | C+ |
| Hallenstein Brothers | Hallenstein Glasson Holdings | B+ |
| Hanes | Hanesbrands | A- |
| Henri Bendel* | L Brands* | D+ |
| Hestia | Hanesbrands | A- |
| Higgledee | ALDI Stores | C- |
| Higgledee Baby | ALDI Stores | C- |
| Hinterland | Big W | C |
| Hollister Co.* | Abercrombie & Fitch* | D |
| Honolua Surf Co. | Billabong | C |
| Horace Small | VF Corp | B |
| HUGO | Hugo Boss Group | C+ |

BRAND INDEX

GRADES BY BRAND

H-M

* = non-responsive companies

| Brand | Parent Company | Grade |
|----------------------|-----------------------------|-------|
| Hurley International | Nike | B- |
| Hush Puppies | Brand Collective (footwear) | C+ |
| H-Wood* | THE ICONIC* | D+ |
| I Love Billy | Munro Footwear Group | D |
| Icebreaker | Icebreaker | A+ |
| Indie | Industrie Clothing | B+ |
| Indie & Co | Industrie Clothing | B+ |
| Industrie | Industrie Clothing | B+ |
| INOC | ALDI Stores | C- |
| Insight | General Pants Group | C+ |
| Intermix | Gap Inc. | B- |
| Intrepid* | The Warehouse Group* | C |
| Isabelle Rossi | Munro Footwear Group | D |
| Ivy Park | Arcadia Group | C+ |
| IZOD* | PVH Corp* | B- |
| Jack London | Factory X | C+ |
| Jacqui E | Just Group | C+ |
| JAG | APG & Co. | A- |
| Jansport | VF Corp | B |
| Jay Jays | Just Group | C+ |
| Jeanswest | Jeanswest | B+ |
| Jets | Jets | C |
| Jockey | Hanesbrands | A- |
| Joe & Co | Big W | C |
| Johnny Bigg | Retail Apparel Group | C+ |
| Jordan | Nike | B- |
| Julius Marlow | Brand Collective (footwear) | C+ |
| Jump* | Voyager Distributing Co* | F |
| Just Jeans | Just Group | C+ |

| Brand | Parent Company | Grade |
|----------------------|---------------------------------|-------|
| K&K* | K&K* | F |
| Kachel* | Voyager Distributing Co* | F |
| Karen Walker* | Karen Walker* | C |
| Kate Madison* | The Warehouse Group* | C |
| Kathmandu | Kathmandu | A |
| Katies | Specialty Fashion Group | C+ |
| Kayser (hosiery) | Hanesbrands | A- |
| Kayser (underwear) | Simon de Winter Group | D+ |
| Kipling | VF Corp | B |
| Kmart | Kmart Australia | B+ |
| Knights Apparel | Hanesbrands | A- |
| Kookai | Kookai | B- |
| Kowtow | Kowtow Clothing | A |
| Ksubi | General Pants Group | C+ |
| Kustom | Billabong | C |
| L&D | ALDI Stores | C- |
| La Senza* | L Brands* | D+ |
| Label/Mix | Next | B- |
| Lacoste | Lacoste | D+ |
| Lauren Ralph Lauren* | Ralph Lauren* | D+ |
| Lee | VF Corp | B |
| Lemonade* | Pavement United Brands* | F |
| Levi's* | Levi Strauss & Co* | B- |
| Liam | De Vere Textiles (RUBY Apparel) | D+ |
| Lily & Dan | ALDI Stores | C- |
| Liminal Apparel | Common Good | A+ |
| Lipsy London | Next | B- |
| Liz Jordan | Noni B Group | D+ |
| Lorna Jane | Lorna Jane | C |

| Brand | Parent Company | Grade |
|---------------------|----------------------------|-------|
| Lowes* | Lowes* | D- |
| Lululemon Athletica | Lululemon Athletica | A- |
| Lu'rv | Factory X | C+ |
| Lyla & Co | Big W | C |
| Lynx | Munro Footwear Group | D |
| Macpac | Macpac | B |
| Maidenform | Hanesbrands | A- |
| Majestic | VF Corp | B |
| Marco Polo | The PAS Group | C- |
| Marcs | Myer | C+ |
| Marks & Spencer | Marks & Spencer | B |
| Match* | The Warehouse Group* | C |
| Max* | Max* | D+ |
| Maya* | The Warehouse Group* | C |
| Michelle Bridges | Big W | C |
| Midas | Munro Footwear Group | D |
| Mighty Good Undies | Mighty Good Group | A+ |
| Milana | David Jones | B- |
| Milkshake | Myer | C+ |
| Millers | Specialty Fashion Group | C+ |
| MIMCO | Country Road Group | A- |
| MINKPINK* | House of Quirky* | F |
| Mirro | Fast Future Brands | D |
| Miss Selfridge | Arcadia Group | C+ |
| Miss Shop | Myer | C+ |
| Mix | Coles | C |
| Mollini | Munro Footwear Group | D |
| Mooks | Designworks Clothing Co. | C |
| Mossimo | Brand Collective (apparel) | C |

BRAND INDEX

GRADES BY BRAND

M-S

* = non-responsive companies

| Brand | Parent Company | Grade |
|-----------------------------|--------------------------|-------|
| Myer | Myer | C+ |
| Napapijri | VF Corp | B |
| Nasty Gal | Boohoo | D |
| Nautica | VF Corp | B |
| Navigator South* | The Warehouse Group* | C |
| Neon Hart | General Pants Group | C+ |
| New Balance | New Balance | B |
| Next | Next | B- |
| Nike | Nike | B- |
| Noni B | Noni B Group | D+ |
| Nudie Jeans | Nudie Jeans Co. | A- |
| Old Navy | Gap Inc. | B- |
| Olga* | PVH Corp* | B- |
| Onitsuka Tiger | ASICS | C+ |
| Organic Baby by David Jones | David Jones | B- |
| Outfit | Arcadia Group | C+ |
| Outfit Kids | Arcadia Group | C+ |
| Outland Denim | Outland Denim | A+ |
| Oxford | Oxford | D |
| Palmers | Billabong | C |
| Patagonia | Patagonia | A |
| Pavement* | Pavement United Brands* | F |
| Petals* | Pavement United Brands* | F |
| Peter Alexander | Just Group | C+ |
| Pickaberry* | The Warehouse Group* | C |
| Ping Pong* | Voyager Distributing Co* | F |
| PINK* | L Brands* | D+ |
| Piper | Myer | C+ |
| Platinum | Hanesbrands | A- |

| Brand | Parent Company | Grade |
|--------------------|--------------------------|-------|
| Playtex | Hanesbrands | A- |
| Polo Ralph Lauren* | Ralph Lauren* | D+ |
| Pom Pom* | Pavement United Brands* | F |
| Portmans | Just Group | C+ |
| Postie+ | Postie+ | C |
| PrettyLittleThing | Boohoo | D |
| Princess Highway | Factory X | C+ |
| Puma | Puma | B |
| R.M. Williams | R.M. Williams | B |
| Ralph Lauren* | Ralph Lauren* | D+ |
| Razzamatazz | Hanesbrands | A- |
| Red Kap | VF Corp | B |
| Red Robin | Hanesbrands | A- |
| Reebok | adidas | A- |
| Reef | VF Corp | B |
| Regatta | Myer | C+ |
| Republic | Designworks Clothing Co. | C |
| Reserve | Myer | C+ |
| Review | The PAS Group | C- |
| Revival | Factory X | C+ |
| Riders by Lee | VF Corp | B |
| Rio | Hanesbrands | A- |
| Rip Curl | Rip Curl | B+ |
| Rivers | Specialty Fashion Group | C+ |
| Rivet* | The Warehouse Group* | C |
| Rock & Republic | VF Corp | B |
| Rockmans | Noni B Group | D+ |
| Rockwear | Retail Apparel Group | C+ |
| Rodd & Gunn | Rodd & Gunn | B |

| Brand | Parent Company | Grade |
|-------------------------------|---------------------------------|-------|
| Roger David | Roger David | D- |
| RREPP | RREPP | A |
| Rubi | Cotton On Group | A |
| RUBY | De Vere Textiles (RUBY Apparel) | D+ |
| Russell Athletic* | Fruit of the Loom* | D+ |
| Rustler | VF Corp | B |
| RVCA | Billabong | C |
| SABA | APG & Co. | A- |
| Sara | Ezibuy | D+ |
| Sass & Bide | Myer | C+ |
| Schooltex* | The Warehouse Group* | C |
| Scram* | Pavement United Brands* | F |
| Seafolly | Seafolly Australia | B- |
| Seed Heritage | Seed Heritage | C- |
| Serra | ALDI Stores | C- |
| Sheer Relief | Hanesbrands | A- |
| Sheridan | Hanesbrands | A- |
| Silent D by Django & Juliette | Munro Footwear Group | D |
| Simon de Winter | Simon de Winter Group | D+ |
| Sista | Designworks Clothing Co. | C |
| Smartwool | VF Corp | B |
| Somedays Lovin* | House of Quirky* | F |
| Spalding* | Fruit of the Loom* | D+ |
| Speedo* | PVH Corp* | B- |
| Sportscraft | APG & Co. | A- |
| Sportsgirl | Sussan Group | C+ |
| Sprout | Myer | C+ |
| Spurr* | THE ICONIC* | D+ |
| St James | David Jones | B- |

BRAND INDEX

GRADES BY BRAND

S-Z

* = non-responsive companies

| Brand | Parent Company | Grade |
|----------------------------|----------------------|-------|
| Standard | General Pants Group | C+ |
| Staple Superior* | THE ICONIC* | D+ |
| Staple the Label* | House of Quirky* | F |
| Subtitled | General Pants Group | C+ |
| Supersoft by Diana Ferrari | Munro Footwear Group | D |
| Supré | Cotton On Group | A |
| Sussan | Sussan Group | C+ |
| Suzanne Grae | Sussan Group | C+ |
| T&T* | T&T* | F |
| Table Eight | Noni B Group | D+ |
| Target | Target Australia | B |
| Tarocash | Retail Apparel Group | C+ |
| TEMT | Fast Future Brands | D |
| The North Face | VF Corp | B |
| The Warehouse* | The Warehouse Group* | C |
| Tigerlily* | Tigerlily* | D |
| Timberland | VF Corp | B |
| Tommy Hilfiger* | PVH Corp* | B- |
| Top End | Munro Footwear Group | D |
| Topman | Arcadia Group | C+ |
| Topshop | Arcadia Group | C+ |
| Torque | ALDI Stores | C- |
| Tree of Life | Tree of Life | C |
| Trelise Cooper Kids* | Trelise Cooper* | F |
| Trelise Cooper* | Trelise Cooper* | F |
| Treney | Country Road Group | A- |
| UNIQLO* | UNIQLO* | D+ |
| Urban | Ezibuy | D+ |
| Urban Equip* | The Warehouse Group* | C |
| Valleygirl | Fast Future Brands | D |

| Brand | Parent Company | Grade |
|--------------------|-----------------------------|-------|
| Van Heusen* | PVH Corp* | B- |
| Vanity Fair* | Fruit of the Loom* | D+ |
| Vans | VF Corp | B |
| Veronika Maine | Cue Clothing Co. | C |
| Victoria's Secret* | L Brands* | D+ |
| Volley | Brand Collective (footwear) | C+ |
| VonZipper | Billabong | C |
| Voodoo | Hanesbrands | A- |
| W. Lane | Noni B Group | D+ |
| Wallis | Arcadia Group | C+ |
| Wanted | Munro Footwear Group | D |
| Warner's* | PVH Corp* | B- |
| Wave Zone | Big W | C |
| Wax Bros.* | Pavement United Brands* | F |
| Weddington Way | Gap Inc. | B- |
| West Bay | ALDI Stores | C- |
| Wish* | Wish Designs* | F |
| Witchery | Country Road Group | A- |
| Wonderbra | Hanesbrands | A- |
| Workzone | ALDI Stores | C- |
| Wrangler | VF Corp | B |
| Xcel | Billabong | C |
| Yarra Trail | The PAS Group | C- |
| yd. | Retail Apparel Group | C+ |
| Young Original* | The Warehouse Group* | C |
| Zara | Inditex | A- |
| Zara Home | Inditex | A- |
| Zimmermann | Zimmermann | C+ |
| Zom-B Denim Co.* | Pavement United Brands* | F |

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

| Parent Company | Brand | Grade |
|--------------------|--------------------|-------|
| Mighty Good Group | Audrey Blue | A+ |
| Common Good | Common Good | A+ |
| Etiko | Etiko | A+ |
| Freeset | Freeset | A+ |
| Icebreaker | Icebreaker | A+ |
| Common Good | Liminal Apparel | A+ |
| Mighty Good Group | Mighty Good Undies | A+ |
| Outland Denim | Outland Denim | A+ |
| Cotton On Group | Cotton On | A |
| Cotton On Group | Cotton On Body | A |
| Cotton On Group | Cotton On Kids | A |
| Cotton On Group | Factorie | A |
| Kathmandu | Kathmandu | A |
| Kowtow Clothing | Kowtow | A |
| Patagonia | Patagonia | A |
| RREPP | RREPP | A |
| Cotton On Group | Rubi | A |
| Cotton On Group | Supré | A |
| Hanesbrands | Actil | A- |
| adidas | adidas | A- |
| Hanesbrands | Bali | A- |
| Hanesbrands | Barely There | A- |
| Hanesbrands | Berlei | A- |
| Hanesbrands | Bonds | A- |
| Hanesbrands | C9 by Champion | A- |
| Hanesbrands | Champion | A- |
| Country Road Group | Country Road | A- |
| Hanesbrands | DIM | A- |
| Hanesbrands | Explorer | A- |

| Parent Company | Brand | Grade |
|---------------------|---------------------|-------|
| Hanesbrands | Gear for Sports | A- |
| Hanesbrands | GTM | A- |
| Hanesbrands | Hanes | A- |
| Hanesbrands | Hestia | A- |
| APG & Co. | JAG | A- |
| Hanesbrands | Jockey | A- |
| Hanesbrands | Kayser (hosiery) | A- |
| Hanesbrands | Knights Apparel | A- |
| Lululemon Athletica | Lululemon Athletica | A- |
| Hanesbrands | Maidenform | A- |
| Country Road Group | MIMCO | A- |
| Nudie Jeans Co. | Nudie Jeans | A- |
| Hanesbrands | Platinum | A- |
| Hanesbrands | Playtex | A- |
| Hanesbrands | Razzamatazz | A- |
| Hanesbrands | Red Robin | A- |
| adidas | Reebok | A- |
| Hanesbrands | Rio | A- |
| APG & Co. | SABA | A- |
| Hanesbrands | Sheer Relief | A- |
| Hanesbrands | Sheridan | A- |
| APG & Co. | Sportscraft | A- |
| Country Road Group | Trenery | A- |
| Hanesbrands | Voodoo | A- |
| Country Road Group | Witchery | A- |
| Hanesbrands | Wonderbra | A- |
| Inditex | Zara | A- |
| Inditex | Zara Home | A- |
| Industrie Clothing | ABCD Indie | B+ |

| Parent Company | Brand | Grade |
|------------------------------|----------------------|-------|
| Gildan Activewear | American Apparel | B+ |
| ASOS | ASOS | B+ |
| H&M | Cheap Monday | B+ |
| H&M | COS | B+ |
| Esprit | edc | B+ |
| Esprit | Esprit | B+ |
| Gildan Activewear | Gildan | B+ |
| Hallenstein Glasson Holdings | Glassons | B+ |
| H&M | H&M | B+ |
| Hallenstein Glasson Holdings | Hallenstein Brothers | B+ |
| Industrie Clothing | Indie | B+ |
| Industrie Clothing | Indie & Co | B+ |
| Industrie Clothing | Industrie | B+ |
| Jeanswest | Jeanswest | B+ |
| Kmart Australia | Kmart | B+ |
| Rip Curl | Rip Curl | B+ |
| VF Corp | Bulwark | B |
| Puma | Cobra Golf | B |
| VF Corp | Eagle Creek | B |
| VF Corp | Eastpak | B |
| VF Corp | Horace Small | B |
| VF Corp | Jansport | B |
| VF Corp | Kipling | B |
| VF Corp | Lee | B |
| Macpac | Macpac | B |
| VF Corp | Majestic | B |
| Marks & Spencer | Marks & Spencer | B |
| VF Corp | Napapijri | B |
| VF Corp | Nautica | B |

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

| Parent Company | Brand | Grade |
|--------------------|--------------------------------|-------|
| New Balance | New Balance | B |
| Puma | Puma | B |
| R.M. Williams | R.M. Williams | B |
| VF Corp | Red Kap | B |
| VF Corp | Reef | B |
| VF Corp | Riders by Lee | B |
| VF Corp | Rock & Republic | B |
| Rodd & Gunn | Rodd & Gunn | B |
| VF Corp | Rustler | B |
| VF Corp | Smartwool | B |
| Target Australia | Target | B |
| VF Corp | The North Face | B |
| VF Corp | Timberland | B |
| VF Corp | Vans | B |
| VF Corp | Wrangler | B |
| David Jones | Agenda | B- |
| David Jones | Alta Linea | B- |
| PVH Corp* | ARROW* | B- |
| Gap Inc. | Athleta | B- |
| Gap Inc. | Banana Republic | B- |
| PVH Corp* | Calvin Klein* | B- |
| Nike | Converse | B- |
| David Jones | David Jones | B- |
| David Jones | David Jones Classic Collection | B- |
| David Jones | David Jones Junior | B- |
| Levi Strauss & Co* | Dockers* | B- |
| Forever New | Forever New | B- |
| Gap Inc. | GAP | B- |
| Nike | Hurley International | B- |

| Parent Company | Brand | Grade |
|-------------------------|-----------------------------|-------|
| Gap Inc. | Intermix | B- |
| PVH Corp* | IZOD* | B- |
| Nike | Jordan | B- |
| Kookai | Kookai | B- |
| Next | Label/Mix | B- |
| Levi Strauss & Co* | Levi's* | B- |
| Next | Lipsy London | B- |
| David Jones | Milana | B- |
| Next | Next | B- |
| Nike | Nike | B- |
| Gap Inc. | Old Navy | B- |
| PVH Corp* | Olga* | B- |
| David Jones | Organic Baby by David Jones | B- |
| Seafolly Australia | Seafolly | B- |
| PVH Corp* | Speedo* | B- |
| David Jones | St James | B- |
| PVH Corp* | Tommy Hilfiger* | B- |
| PVH Corp* | Van Heusen* | B- |
| PVH Corp* | Warner's* | B- |
| Gap Inc. | Weddington Way | B- |
| Factory X | Alannah Hill | C+ |
| General Pants Group | Alice in the Eve | C+ |
| General Pants Group | Arvust | C+ |
| AS Colour | AS Colour | C+ |
| ASICS | ASICS | C+ |
| ASICS | ASICS Tiger | C+ |
| Specialty Fashion Group | Autograph | C+ |
| Factory X | Autonomy | C+ |
| Barkers Clothing | Barkers | C+ |

| Parent Company | Brand | Grade |
|-----------------------------|------------------|-------|
| Myer | Basque | C+ |
| Myer | Blaq | C+ |
| General Pants Group | BNWR | C+ |
| Hugo Boss Group | BOSS | C+ |
| Hugo Boss Group | BOSS GREEN | C+ |
| Hugo Boss Group | BOSS ORANGE | C+ |
| Arcadia Group | Burton Menswear | C+ |
| General Pants Group | Candidate | C+ |
| Specialty Fashion Group | City Chic | C+ |
| Brand Collective (footwear) | Clarks | C+ |
| Retail Apparel Group | Connor | C+ |
| Specialty Fashion Group | Crossroads | C+ |
| Factory X | Dangerfield | C+ |
| Myer | David Lawrence | C+ |
| General Pants Group | Don't Ask Amanda | C+ |
| Arcadia Group | Dorothy Perkins | C+ |
| Just Group | Dotti | C+ |
| Arcadia Group | Evans | C+ |
| Gorman | Gorman | C+ |
| General Pants Group | GP Co Basics | C+ |
| General Pants Group | GP Tees | C+ |
| Brand Collective (footwear) | Grosby | C+ |
| ASICS | HAGLOFS | C+ |
| Hugo Boss Group | HUGO | C+ |
| Brand Collective (footwear) | Hush Puppies | C+ |
| General Pants Group | Insight | C+ |
| Arcadia Group | Ivy Park | C+ |
| Factory X | Jack London | C+ |
| Just Group | Jacqui E | C+ |

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

| Parent Company | Brand | Grade |
|-----------------------------|------------------|-------|
| Just Group | Jay Jays | C+ |
| Retail Apparel Group | Johnny Bigg | C+ |
| Brand Collective (footwear) | Julius Marlow | C+ |
| Just Group | Just Jeans | C+ |
| Specialty Fashion Group | Katies | C+ |
| General Pants Group | Ksubi | C+ |
| Factory X | Lu'rv | C+ |
| Myer | Marc's | C+ |
| Myer | Milkshake | C+ |
| Specialty Fashion Group | Millers | C+ |
| Arcadia Group | Miss Selfridge | C+ |
| Myer | Miss Shop | C+ |
| Myer | Myer | C+ |
| General Pants Group | Neon Hart | C+ |
| ASICS | Onitsuka Tiger | C+ |
| Arcadia Group | Outfit | C+ |
| Arcadia Group | Outfit Kids | C+ |
| Just Group | Peter Alexander | C+ |
| Myer | Piper | C+ |
| Just Group | Portmans | C+ |
| Factory X | Princess Highway | C+ |
| Myer | Regatta | C+ |
| Myer | Reserve | C+ |
| Factory X | Revival | C+ |
| Specialty Fashion Group | Rivers | C+ |
| Retail Apparel Group | Rockwear | C+ |
| Myer | Sass & Bide | C+ |
| Sussan Group | Sportsgirl | C+ |
| Myer | Sprout | C+ |

| Parent Company | Brand | Grade |
|-----------------------------|-------------------|-------|
| General Pants Group | Standard | C+ |
| General Pants Group | Subtitled | C+ |
| Sussan Group | Sussan | C+ |
| Sussan Group | Suzanne Grae | C+ |
| Retail Apparel Group | Tarocash | C+ |
| Arcadia Group | Topman | C+ |
| Arcadia Group | Topshop | C+ |
| Brand Collective (footwear) | Volley | C+ |
| Arcadia Group | Wallis | C+ |
| Retail Apparel Group | yd. | C+ |
| Zimmermann | Zimmermann | C+ |
| The Warehouse Group* | Active Intent* | C |
| The Warehouse Group* | Amco* | C |
| The Warehouse Group* | A'nD* | C |
| Anthea Crawford* | Anthea Crawford* | C |
| Big W | Avella | C |
| Big W | B Active | C |
| Big W | B Athletic | C |
| Big W | B Collection | C |
| Designworks Clothing Co. | B.O.D | C |
| The Warehouse Group* | Back Country* | C |
| The Warehouse Group* | Basics Brand* | C |
| The Warehouse Group* | Basics Maternity* | C |
| The Warehouse Group* | Beach Works* | C |
| Best & Less | Best & Less | C |
| Big W | Big W | C |
| Billabong | Billabong | C |
| Big W | Blacksmith | C |
| The Warehouse Group* | Blue Denim Co* | C |

| Parent Company | Brand | Grade |
|----------------------------|------------------|-------|
| Boden | Boden | C |
| Big W | Circuit | C |
| Cue Clothing Co. | Cue | C |
| The Warehouse Group* | Debut* | C |
| Big W | Denim 1964 | C |
| Billabong | Element | C |
| Brand Collective (apparel) | Elka Collective | C |
| Brand Collective (apparel) | Elwood | C |
| Big W | Emerson | C |
| The Warehouse Group* | Garage* | C |
| The Warehouse Group* | H&H* | C |
| Big W | Hinterland | C |
| Billabong | Honolua Surf Co. | C |
| The Warehouse Group* | Intrepid* | C |
| Jets | Jets | C |
| Big W | Joe & Co | C |
| Karen Walker* | Karen Walker* | C |
| The Warehouse Group* | Kate Madison* | C |
| Billabong | Kustom | C |
| Lorna Jane | Lorna Jane | C |
| Big W | Lyla & Co | C |
| The Warehouse Group* | Match* | C |
| The Warehouse Group* | Maya* | C |
| Big W | Michelle Bridges | C |
| Coles | Mix | C |
| Designworks Clothing Co. | Mooks | C |
| Brand Collective (apparel) | Mossimo | C |
| The Warehouse Group* | Navigator South* | C |
| Billabong | Palmers | C |

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

| Parent Company | Brand | Grade |
|--------------------------|--------------------|-------|
| The Warehouse Group* | Pickaberry* | C |
| Postie+ | Postie+ | C |
| Designworks Clothing Co. | Republic | C |
| The Warehouse Group* | Rivet* | C |
| Billabong | RVCA | C |
| The Warehouse Group* | Schooltex* | C |
| Designworks Clothing Co. | Sista | C |
| The Warehouse Group* | The Warehouse* | C |
| Tree of Life | Tree of Life | C |
| The Warehouse Group* | Urban Equip* | C |
| Cue Clothing Co. | Veronika Maine | C |
| Billabong | VonZipper | C |
| Big W | Wave Zone | C |
| Billabong | Xcel | C |
| The Warehouse Group* | Young Original* | C |
| ALDI Stores | Aldi | C- |
| ALDI Stores | Barely Basics | C- |
| ALDI Stores | Barely Essentials | C- |
| Ben Sherman Australia | Ben Sherman | C- |
| The PAS Group | Black Pepper | C- |
| The PAS Group | Breakaway | C- |
| ALDI Stores | Crane | C- |
| ALDI Stores | Crane Performance | C- |
| ALDI Stores | Crane Snow Extreme | C- |
| The PAS Group | Equus | C- |
| The PAS Group | Extra Pepper | C- |
| ALDI Stores | Higgledee | C- |
| ALDI Stores | Higgledee Baby | C- |
| ALDI Stores | INOC | C- |

| Parent Company | Brand | Grade |
|---------------------------------|----------------------|-------|
| ALDI Stores | L&D | C- |
| ALDI Stores | Lily & Dan | C- |
| The PAS Group | Marco Polo | C- |
| The PAS Group | Review | C- |
| Seed Heritage | Seed Heritage | C- |
| ALDI Stores | Serra | C- |
| ALDI Stores | Torque | C- |
| ALDI Stores | West Bay | C- |
| ALDI Stores | Workzone | C- |
| The PAS Group | Yarra Trail | C- |
| THE ICONIC* | Atmos&Here* | D+ |
| Noni B Group | beme | D+ |
| Ezibuy | Capture | D+ |
| Ralph Lauren* | Club Monaco* | D+ |
| Simon de Winter Group | Darn Tough | D+ |
| THE ICONIC* | Dazie* | D+ |
| THE ICONIC* | Double Oak Mills* | D+ |
| Ezibuy | Emerge | D+ |
| Ezibuy | EziBuy | D+ |
| Simon de Winter Group | Fine Lines | D+ |
| Fruit of the Loom* | Fruit of the Loom* | D+ |
| Ezibuy | Grace Hill | D+ |
| L Brands* | Henri Bendel* | D+ |
| THE ICONIC* | H-Wood* | D+ |
| Simon de Winter Group | Kayser (underwear) | D+ |
| L Brands* | La Senza* | D+ |
| Lacoste | Lacoste | D+ |
| Ralph Lauren* | Lauren Ralph Lauren* | D+ |
| De Vere Textiles (RUBY Apparel) | Liam | D+ |

| Parent Company | Brand | Grade |
|---------------------------------|----------------------|-------|
| Noni B Group | Liz Jordan | D+ |
| Max* | Max* | D+ |
| Noni B Group | Noni B | D+ |
| L Brands* | PINK* | D+ |
| Ralph Lauren* | Polo Ralph Lauren* | D+ |
| Ralph Lauren* | Ralph Lauren* | D+ |
| Noni B Group | Rockmans | D+ |
| De Vere Textiles (RUBY Apparel) | RUBY | D+ |
| Fruit of the Loom* | Russell Athletic* | D+ |
| Ezibuy | Sara | D+ |
| Simon de Winter Group | Simon de Winter | D+ |
| Fruit of the Loom* | Spalding* | D+ |
| THE ICONIC* | Spurr* | D+ |
| THE ICONIC* | Staple Superior* | D+ |
| Noni B Group | Table Eight | D+ |
| UNIQLO* | UNIQLO* | D+ |
| Ezibuy | Urban | D+ |
| Fruit of the Loom* | Vanity Fair* | D+ |
| L Brands* | Victoria's Secret* | D+ |
| Noni B Group | W. Lane | D+ |
| Abercrombie & Fitch* | Abercrombie & Fitch* | D |
| Abercrombie & Fitch* | Abercrombie Kids* | D |
| Bardot | Bardot | D |
| Bardot | Bardot Junior | D |
| Blue Illusion | Blue Illusion | D |
| Boohoo | boohoo | D |
| Boohoo | boohooMAN | D |
| Munro Footwear Group | Cinori | D |
| Munro Footwear Group | Colorado | D |

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

| Parent Company | Brand | Grade |
|----------------------|-------------------------------|-------|
| Munro Footwear Group | Corelli | D |
| Munro Footwear Group | Diana Ferrari | D |
| Munro Footwear Group | Django & Juliette | D |
| Forever 21 | Forever 21 | D |
| Munro Footwear Group | Gamins | D |
| Abercrombie & Fitch* | Gilly Hicks* | D |
| Abercrombie & Fitch* | Hollister Co.* | D |
| Munro Footwear Group | I Love Billy | D |
| Munro Footwear Group | Isabelle Rossi | D |
| Munro Footwear Group | Lynx | D |
| Munro Footwear Group | Midas | D |
| Fast Future Brands | Mirrou | D |
| Munro Footwear Group | Mollini | D |
| Boohoo | Nasty Gal | D |
| Oxford | Oxford | D |
| Boohoo | PrettyLittleThing | D |
| Munro Footwear Group | Silent D by Django & Juliette | D |
| Munro Footwear Group | Supersoft by Diana Ferrari | D |
| Fast Future Brands | TEMT | D |
| Tigerlily* | Tigerlily* | D |
| Munro Footwear Group | Top End | D |
| Fast Future Brands | Valleygirl | D |
| Munro Footwear Group | Wanted | D |
| Betts Group | Airflex | D- |
| Lowes* | Beare & Ley* | D- |
| Betts Group | Betts | D- |
| Betts Group | Betts Kids | D- |
| Gazal* | Bisley* | D- |
| Farmers* | Farmers* | D- |
| Gazal* | Gazal* | D- |

| Parent Company | Brand | Grade |
|--------------------------|---------------------------|-------|
| Lowes* | Lowes* | D- |
| Roger David | Roger David | D- |
| Ally Fashion* | Ally* | F |
| House of Quirky* | AndCo* | F |
| Bloch* | Bloch* | F |
| Bras N Things* | Bras N Things* | F |
| Pavement United Brands* | Coco Beach* | F |
| Trelise Cooper* | Cooper* | F |
| Decjuba* | Decjuba* | F |
| Decjuba* | D-Luxe Basics by Decjuba* | F |
| House of Quirky* | Evil Twin* | F |
| Voyager Distributing Co* | Jump* | F |
| K&K* | K&K* | F |
| Voyager Distributing Co* | Kachel* | F |
| Pavement United Brands* | Lemonade* | F |
| House of Quirky* | MINKPINK* | F |
| Pavement United Brands* | Pavement* | F |
| Pavement United Brands* | Petals* | F |
| Voyager Distributing Co* | Ping Pong* | F |
| Pavement United Brands* | Pom Pom* | F |
| Pavement United Brands* | Scram* | F |
| House of Quirky* | Somedays Lovin** | F |
| House of Quirky* | Staple the Label* | F |
| T&T* | T&T* | F |
| Trelise Cooper* | Trelise Cooper Kids* | F |
| Trelise Cooper* | Trelise Cooper* | F |
| Pavement United Brands* | Wax Bros.* | F |
| Wish Designs* | Wish* | F |
| Pavement United Brands* | Zom-B Denim Co.* | F |

12

Survey Data

This section provides a breakdown of the data behind each grade for the 114 companies assessed in The Report. The data is presented in a section-by-section and question-by-question breakdown.

SURVEY DATA

POLICIES

M-Z

OVERALL GRADE

| | |
|--------------------------|----|
| Macpac | B |
| Marks & Spencer | B |
| Max* | D+ |
| Mighty Good Group | A+ |
| Munro Footwear Group | D |
| Myer | C+ |
| New Balance | B |
| Next | B- |
| Nike | B- |
| Noni B Group | D+ |
| Nudie Jeans | A- |
| Outland Denim | A+ |
| Oxford | D |
| Patagonia | A |
| Pavement United Brands* | F |
| Postie+ | C |
| Puma | B |
| PVH Corp* | B- |
| R.M. Williams | B |
| Ralph Lauren* | D+ |
| Retail Apparel Group | C+ |
| Rip Curl | B+ |
| Rodd & Gunn | B |
| Roger David | D- |
| RREPP | A |
| Seafolly | B- |
| Seed Heritage | C- |
| Simon de Winter Group | D+ |
| Specialty Fashion Group | C+ |
| Sussan Group | C+ |
| T&T* | F |
| Target Australia | B |
| THE ICONIC* | D+ |
| The PAS Group | C- |
| The Warehouse Group* | C |
| Tigerlily* | D |
| Tree of Life | C |
| Trelise Cooper* | F |
| UNIQLO* | D+ |
| VF Corp | B |
| Voyager Distributing Co* | F |
| Wish Designs* | F |
| Zimmermann | C+ |

POLICIES GRADE

| | |
|--------------------------|----|
| Macpac | A+ |
| Marks & Spencer | A+ |
| Max* | A |
| Mighty Good Group | A+ |
| Munro Footwear Group | B+ |
| Myer | A |
| New Balance | A+ |
| Next | A+ |
| Nike | A+ |
| Noni B Group | A- |
| Nudie Jeans | A+ |
| Outland Denim | A+ |
| Oxford | A |
| Patagonia | A |
| Pavement United Brands* | F |
| Postie+ | A+ |
| Puma | A+ |
| PVH Corp* | A+ |
| R.M. Williams | A+ |
| Ralph Lauren* | B |
| Retail Apparel Group | A |
| Rip Curl | A+ |
| Rodd & Gunn | A+ |
| Roger David | F |
| RREPP | A+ |
| Seafolly | A+ |
| Seed Heritage | A+ |
| Simon de Winter Group | A |
| Specialty Fashion Group | A |
| Sussan Group | A |
| T&T* | F |
| Target Australia | A+ |
| THE ICONIC* | A- |
| The PAS Group | A |
| The Warehouse Group* | A |
| Tigerlily* | B+ |
| Tree of Life | A |
| Trelise Cooper* | F |
| UNIQLO* | A- |
| VF Corp | A+ |
| Voyager Distributing Co* | F |
| Wish Designs* | F |
| Zimmermann | A |

CODE OF CONDUCT

- Q1** Does the brand have a Code of Conduct for suppliers that covers the ILO Four Fundamental Principles and Rights at Work?
- Q2** Does the code prohibit the use of regular and excessive overtime?
- Q3** Are suppliers required to ensure freedom of movement for employees and their right to enter and leave employment willingly and voluntarily?
- Q4** Does the code include provisions to protect worker health and safety?
- Q5** Does the code apply to multiple levels of the supply chain including the raw materials level?
- Q6** Is the code included in supplier contracts?

| | | | | | | |
|--------------------------|-------|--------|--------|-------|-------|-------|
| Macpac | Green | Green | Green | Green | Green | Red |
| Marks & Spencer | Green | Green | Green | Green | Green | Red |
| Max* | Green | Green | Green | Green | Green | Red |
| Mighty Good Group | Green | Green | Green | Green | Green | Green |
| Munro Footwear Group | Green | Yellow | Green | Green | Green | Green |
| Myer | Green | Green | Green | Green | Green | Green |
| New Balance | Green | Green | Green | Green | Green | Green |
| Next | Green | Green | Green | Green | Green | Green |
| Nike | Green | Green | Green | Green | Green | Green |
| Noni B Group | Green | Green | Green | Green | Green | Green |
| Nudie Jeans | Green | Green | Yellow | Green | Green | Green |
| Outland Denim | Green | Green | Green | Green | Green | Green |
| Oxford | Green | Green | Green | Green | Green | Green |
| Patagonia | Green | Green | Green | Green | Green | Green |
| Pavement United Brands* | Red | Red | Red | Red | Red | Red |
| Postie+ | Green | Green | Green | Green | Green | Green |
| Puma | Green | Green | Green | Green | Green | Green |
| PVH Corp* | Green | Green | Green | Green | Green | Green |
| R.M. Williams | Green | Green | Green | Green | Green | Green |
| Ralph Lauren* | Green | Green | Green | Green | Green | Green |
| Retail Apparel Group | Green | Green | Green | Green | Green | Green |
| Rip Curl | Green | Green | Green | Green | Green | Green |
| Rodd & Gunn | Green | Green | Green | Green | Green | Green |
| Roger David | Green | Green | Green | Green | Green | Red |
| RREPP | Green | Green | Green | Green | Green | Green |
| Seafolly | Green | Green | Green | Green | Green | Green |
| Seed Heritage | Green | Green | Green | Green | Green | Green |
| Simon de Winter Group | Green | Green | Green | Green | Green | Green |
| Specialty Fashion Group | Green | Green | Green | Green | Green | Green |
| Sussan Group | Green | Green | Green | Green | Green | Green |
| T&T* | Green | Green | Green | Green | Green | Red |
| Target Australia | Green | Green | Green | Green | Green | Green |
| THE ICONIC* | Green | Green | Green | Green | Green | Green |
| The PAS Group | Green | Green | Green | Green | Green | Green |
| The Warehouse Group* | Green | Green | Green | Green | Green | Green |
| Tigerlily* | Green | Green | Green | Green | Green | Green |
| Tree of Life | Green | Green | Green | Green | Green | Green |
| Trelise Cooper* | Green | Green | Green | Green | Green | Green |
| UNIQLO* | Green | Green | Green | Green | Green | Green |
| VF Corp | Green | Green | Green | Green | Green | Green |
| Voyager Distributing Co* | Green | Green | Green | Green | Green | Green |
| Wish Designs* | Green | Green | Green | Green | Green | Green |
| Zimmermann | Green | Green | Green | Green | Green | Green |

POLICIES

- Q1** Does the brand have a policy addressing gender inequality in the supply chain, including a strategy to address discrimination faced by women in the apparel industry?
- Q2** Does the brand have a policy on responsible purchasing practices in relation to supplier engagement that aims to improve working conditions?

| | | |
|--------------------------|-------|-------|
| Macpac | Green | Green |
| Marks & Spencer | Green | Green |
| Max* | Green | Green |
| Mighty Good Group | Green | Green |
| Munro Footwear Group | Green | Green |
| Myer | Green | Green |
| New Balance | Green | Green |
| Next | Green | Green |
| Nike | Green | Green |
| Noni B Group | Green | Green |
| Nudie Jeans | Green | Green |
| Outland Denim | Green | Green |
| Oxford | Green | Green |
| Patagonia | Green | Green |
| Pavement United Brands* | Red | Red |
| Postie+ | Green | Green |
| Puma | Green | Green |
| PVH Corp* | Green | Green |
| R.M. Williams | Green | Green |
| Ralph Lauren* | Green | Green |
| Retail Apparel Group | Green | Green |
| Rip Curl | Green | Green |
| Rodd & Gunn | Green | Green |
| Roger David | Green | Green |
| RREPP | Green | Green |
| Seafolly | Green | Green |
| Seed Heritage | Green | Green |
| Simon de Winter Group | Green | Green |
| Specialty Fashion Group | Green | Green |
| Sussan Group | Green | Green |
| T&T* | Green | Green |
| Target Australia | Green | Green |
| THE ICONIC* | Green | Green |
| The PAS Group | Green | Green |
| The Warehouse Group* | Green | Green |
| Tigerlily* | Green | Green |
| Tree of Life | Green | Green |
| Trelise Cooper* | Green | Green |
| UNIQLO* | Green | Green |
| VF Corp | Green | Green |
| Voyager Distributing Co* | Green | Green |
| Wish Designs* | Green | Green |
| Zimmermann | Green | Green |

Key: YES PARTIAL NO * = non-responsive companies

SURVEY DATA

TRACEABILITY & TRANSPARENCY FINAL STAGE PRODUCTION

L-Z

OVERALL GRADE

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------|---------|--------------------|------------|--------|---------------------|--------|-----------------|------|-------------------|----------------------|------|-------------|------|------|--------------|-------------|---------------|--------|-----------|-------------------------|---------|------|-----------|---------------|---------------|----------------------|----------|-------------|-------------|-------|----------|---------------|-----------------------|-------------------------|--------------|------|------------------|-------------|---------------|----------------------|------------|--------------|-----------------|---------|---------|--------------------------|---------------|------------|
| D+ | D+ | B- | C | D- | A- | B | D+ | D | C+ | B | B- | B- | D+ | A- | A+ | D | A | F | C | B | B- | B- | D+ | C+ | B+ | D- | A | B- | C- | D+ | C+ | C+ | F | B | D+ | C- | C | D | C | F | D+ | B | F | C+ | | | | |
| L Brands* | Lacoste | Levi Strauss & Co* | Lorna Jane | Lowes* | Lululemon Athletica | Macpac | Marks & Spencer | Max* | Mighty Good Group | Munro Footwear Group | Myer | New Balance | Next | Nike | Noni B Group | Nudie Jeans | Outland Denim | Oxford | Patagonia | Pavement United Brands* | Postie+ | Puma | PVH Corp* | R.M. Williams | Ralph Lauren* | Retail Apparel Group | Rip Curl | Rodd & Gunn | Roger David | RREPP | Seafolly | Seed Heritage | Simon de Winter Group | Specialty Fashion Group | Sussan Group | T&T* | Target Australia | THE ICONIC* | The PAS Group | The Warehouse Group* | Tigerlily* | Tree of Life | Trelise Cooper* | UNIQLO* | VF Corp | Voyager Distributing Co* | Wish Designs* | Zimmermann |

TRACEABILITY & TRANSPARENCY GRADE

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----|---|----|----|---|----|---|----|----|----|---|----|----|----|----|----|---|----|----|----|----|----|----|----|----|---|----|---|---|----|----|----|----|----|----|---|----|----|----|----|---|---|---|---|----|---|---|---|
| C- | D | A- | C- | F | A- | B | A- | C- | A+ | D | B- | A- | B+ | B+ | D+ | A | A+ | D- | A+ | D- | D+ | A- | B- | A- | C | B- | A | D | A+ | C+ | D+ | D+ | B- | C- | F | B+ | D+ | C+ | B- | D | C | F | C | A- | F | F | C |
|----|---|----|----|---|----|---|----|----|----|---|----|----|----|----|----|---|----|----|----|----|----|----|----|----|---|----|---|---|----|----|----|----|----|----|---|----|----|----|----|---|---|---|---|----|---|---|---|

TRACEABILITY

- Q1** Approximately what percentage of facilities has the brand traced?
- Q2** If not fully traced, is the brand involved in a tracing project to locate unknown suppliers?
- Q3** Does the brand ensure that there is either no subcontracting or that all subcontracted production adheres to code standards?
- Q4** Does the brand track suppliers' use of temporary or contract workers?
- Q5** Has the brand conducted a labour rights risk assessment of its supply chain to improve its labour rights management system?

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------|--------|------|------|-------|------|------|------|------|------|------|------|--------|------|--------|------|------|-------|------|--------|--------|------|------|------|------|------|------|------|------|--------|------|--------|------|------|----|------|------|------|------|--------|------|----|--------|------|----|----|------|
| 76-99% | 51-75% | 100% | 100% | 1-25% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 76-99% | 100% | 51-75% | 100% | 100% | 1-25% | 100% | 76-99% | 76-99% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 76-99% | 100% | 76-99% | 100% | 100% | 0% | 100% | 100% | 100% | 100% | 76-99% | 100% | 0% | 76-99% | 100% | 0% | 0% | 100% |
|--------|--------|------|------|-------|------|------|------|------|------|------|------|--------|------|--------|------|------|-------|------|--------|--------|------|------|------|------|------|------|------|------|--------|------|--------|------|------|----|------|------|------|------|--------|------|----|--------|------|----|----|------|

TRANSPARENCY

- Q1** Is there a public list of supplier farm/facilities?
- Q2** Does the public list contain detailed indicators about each farm/facility?
- Q3** Are broad monitoring results shared publicly?

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|



FINAL STAGE PRODUCTION

Key: YES PARTIAL NO 100% 76-99% 51-75% 26-50% 1-25% 0% N/A * = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS INPUTS PRODUCTION

J-Z

OVERALL GRADE

| | |
|--------------------------|----|
| Jeanswest | B+ |
| JETS | C |
| Just Group | C+ |
| K&K* | F |
| Karen Walker* | C |
| Kathmandu | A |
| Kmart | B+ |
| Kookai | B- |
| Kowtow | A |
| L Brands* | D+ |
| Lacoste | D+ |
| Levi Strauss & Co* | B- |
| Lorna Jane | C |
| Lowes* | D- |
| Lululemon Athletica | A- |
| Macpac | B |
| Marks & Spencer | B |
| Max* | D+ |
| Mighty Good Group | A+ |
| Munro Footwear Group | D |
| Myer | C+ |
| New Balance | B- |
| Next | B- |
| Nike | B- |
| Noni B Group | D+ |
| Nudie Jeans | A |
| Outland Denim | A+ |
| Oxford | D |
| Patagonia | A |
| Pavement United Brands* | F |
| Postie+ | C |
| Puma | B |
| PVH Corp* | B- |
| R.M. Williams | B |
| Ralph Lauren* | D+ |
| Retail Apparel Group | C+ |
| Rip Curl | B+ |
| Rodd & Gunn | B |
| Roger David | D- |
| RREPP | A- |
| Seafolly | B- |
| Seed Heritage | C- |
| Simon de Winter Group | D+ |
| Specialty Fashion Group | C+ |
| Sussan Group | C+ |
| T&T* | F |
| Target Australia | B |
| THE ICONIC* | D+ |
| The PAS Group | C- |
| The Warehouse Group* | C |
| Tigerlily* | D |
| Tree of Life | C |
| Trelise Cooper* | F |
| UNIQLO* | D+ |
| VF Corp | B |
| Voyager Distributing Co* | F |
| Wish Designs* | F |
| Zimmermann | C+ |

AUDITING & SUPPLIER RELATIONSHIPS GRADE

AUDITING

Q1 What percentage of facilities are audited over a 2 year period by trained social auditors (internal and/or third party)?

What percentage of facilities are internally audited by staff with social audit training?

What percentage of facilities are audited by third party auditors that specialise in labour standards?

Q2 What percentage of facilities are audited with unannounced audits, anonymous worker surveys or off-site worker interviews per year?

Q3 Are suppliers monitored for their use of labour brokers and recruitment fees?

Q4 What percentage of corrective action plans pertaining to wages and/or overtime are resolved within 12 months?

| | | | | | | | |
|--------------------------|--------|--------|--------|-------|----|----|----|
| Jeanswest | 26-50% | 26-50% | 0% | 1-25% | 0% | 0% | 0% |
| JETS | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Just Group | 26-50% | 0% | 26-50% | 0% | 0% | 0% | 0% |
| K&K* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Karen Walker* | 100% | 26-50% | 26-50% | 100% | 0% | 0% | 0% |
| Kathmandu | 51-75% | 0% | 51-75% | 0% | 0% | 0% | 0% |
| Kmart | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| Kookai | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Kowtow | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| L Brands* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lacoste | 76-99% | 0% | 76-99% | 0% | 0% | 0% | 0% |
| Levi Strauss & Co* | 100% | 26-50% | 26-50% | 100% | 0% | 0% | 0% |
| Lorna Jane | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lowes* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lululemon Athletica | 100% | 76-99% | 100% | 1-25% | 0% | 0% | 0% |
| Macpac | 76-99% | 26-50% | 76-99% | 1-25% | 0% | 0% | 0% |
| Marks & Spencer | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Max* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Mighty Good Group | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| Munro Footwear Group | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Myer | 100% | 1-25% | 100% | 1-25% | 0% | 0% | 0% |
| New Balance | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Next | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Nike | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Noni B Group | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Nudie Jeans | 26-50% | 0% | 26-50% | 0% | 0% | 0% | 0% |
| Outland Denim | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| Oxford | 76-99% | 76-99% | 76-99% | 0% | 0% | 0% | 0% |
| Patagonia | 51-75% | 26-50% | 51-75% | 0% | 0% | 0% | 0% |
| Pavement United Brands* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Postie+ | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Puma | 51-75% | 0% | 51-75% | 0% | 0% | 0% | 0% |
| PVH Corp* | 1-25% | 51-75% | 1-25% | 0% | 0% | 0% | 0% |
| R.M. Williams | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Ralph Lauren* | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| Retail Apparel Group | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Rip Curl | 76-99% | 0% | 76-99% | 0% | 0% | 0% | 0% |
| Rodd & Gunn | 51-75% | 0% | 51-75% | 0% | 0% | 0% | 0% |
| Roger David | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| RREPP | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| Seafolly | 76-99% | 76-99% | 76-99% | 0% | 0% | 0% | 0% |
| Seed Heritage | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Simon de Winter Group | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Specialty Fashion Group | 26-50% | 0% | 26-50% | 0% | 0% | 0% | 0% |
| Sussan Group | 51-75% | 0% | 51-75% | 0% | 0% | 0% | 0% |
| T&T* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Target Australia | 100% | 0% | 100% | 0% | 0% | 0% | 0% |
| THE ICONIC* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| The PAS Group | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| The Warehouse Group* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Tigerlily* | 1-25% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Tree of Life | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Trelise Cooper* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| UNIQLO* | 1-25% | 76-99% | 1-25% | 0% | 0% | 0% | 0% |
| VF Corp | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Voyager Distributing Co* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Wish Designs* | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Zimmermann | 51-75% | 0% | 51-75% | 0% | 0% | 0% | 0% |

SUPPLIER RELATIONSHIPS

Q1 Does the brand invest in training buyers and suppliers/ factory managers, in order to increase awareness of human rights and health and safety risks?

Q2 Does the company actively improve leverage and relationships with suppliers, through supplier consolidation and industry collaboration?

Q3 Does that company have a preferred supplier program by which suppliers are incentivised by strong labour rights records?

Q4 For companies more than 10 years old: What proportion of suppliers has the company sourced from for at least 5 years?

| | | | | | | | |
|--------------------------|--------|--|--|--|--|--|--|
| Jeanswest | 76-99% | | | | | | |
| JETS | 0% | | | | | | |
| Just Group | 0% | | | | | | |
| K&K* | 0% | | | | | | |
| Karen Walker* | 51-75% | | | | | | |
| Kathmandu | 26-50% | | | | | | |
| Kmart | 51-75% | | | | | | |
| Kookai | 26-50% | | | | | | |
| Kowtow | 0% | | | | | | |
| L Brands* | 1-25% | | | | | | |
| Lacoste | 0% | | | | | | |
| Levi Strauss & Co* | 1-25% | | | | | | |
| Lorna Jane | 0% | | | | | | |
| Lowes* | 0% | | | | | | |
| Lululemon Athletica | 76-99% | | | | | | |
| Macpac | 76-99% | | | | | | |
| Marks & Spencer | 0% | | | | | | |
| Max* | N/A | | | | | | |
| Mighty Good Group | 0% | | | | | | |
| Munro Footwear Group | 0% | | | | | | |
| Myer | 0% | | | | | | |
| New Balance | 26-50% | | | | | | |
| Next | 26-50% | | | | | | |
| Nike | 26-50% | | | | | | |
| Noni B Group | N/A | | | | | | |
| Nudie Jeans | 0% | | | | | | |
| Outland Denim | 0% | | | | | | |
| Oxford | 76-99% | | | | | | |
| Patagonia | 0% | | | | | | |
| Pavement United Brands* | 0% | | | | | | |
| Postie+ | 0% | | | | | | |
| Puma | 26-50% | | | | | | |
| PVH Corp* | 0% | | | | | | |
| R.M. Williams | 26-50% | | | | | | |
| Ralph Lauren* | 51-75% | | | | | | |
| Retail Apparel Group | 76-99% | | | | | | |
| Rip Curl | 100% | | | | | | |
| Rodd & Gunn | N/A | | | | | | |
| Roger David | 51-75% | | | | | | |
| RREPP | 100% | | | | | | |
| Seafolly | 51-75% | | | | | | |
| Seed Heritage | 0% | | | | | | |
| Simon de Winter Group | 0% | | | | | | |
| Specialty Fashion Group | 26-50% | | | | | | |
| Sussan Group | 76-99% | | | | | | |
| T&T* | 0% | | | | | | |
| Target Australia | 1-25% | | | | | | |
| THE ICONIC* | N/A | | | | | | |
| The PAS Group | 0% | | | | | | |
| The Warehouse Group* | 0% | | | | | | |
| Tigerlily* | 26-50% | | | | | | |
| Tree of Life | 0% | | | | | | |
| Trelise Cooper* | 0% | | | | | | |
| UNIQLO* | 1-25% | | | | | | |
| VF Corp | 0% | | | | | | |
| Voyager Distributing Co* | 0% | | | | | | |
| Wish Designs* | 0% | | | | | | |
| Zimmermann | 76-99% | | | | | | |

Key: YES PARTIAL NO 100% 76-99% 51-75% 26-50% 1-25% 0% N/A * = non-responsive companies



SURVEY DATA

WORKER EMPOWERMENT FINAL STAGE PRODUCTION

A-J



FINAL STAGE PRODUCTION

OVERALL GRADE

WORKER EMPOWERMENT GRADE

WAGES

- Q1** Has the company developed a living wage methodology and calculated a living wage for each region that it operates in?
- Q2** Has the brand published a commitment to pay living wages, which is timebound and measurable, including a methodology or benchmark?
- Q3** What percentage of facilities have projects to improve wages?
- Q4** What percentage of facilities pay a living wage?

WORKER VOICE

- Q1** What percentage of facilities are known to have independent democratically elected trade unions and/or collective bargaining agreements?
- Q2** Are all workers trained on their rights regarding freedom of association?
- Q3** Does the company have a functioning grievance mechanism which workers can access anonymously and in their native language?
- Q4** Are workers trained on their rights and entitlements, including how to use grievance mechanisms?

CHILD & FORCED LABOR REMEDIATION PLAN

- Q1** Where child labour and/or forced labour is found to exist, does the company consult with credible civil society organisations in developing a plan for redress?

| Brand | Overall Grade | Worker Empowerment Grade | Q1 (Wages) | Q2 (Wages) | Q3 (Wages) | Q4 (Wages) | Q1 (Voice) | Q2 (Voice) | Q3 (Voice) | Q4 (Voice) | Child & Forced Labor |
|---------------------------------|---------------|--------------------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------------|
| Abercrombie & Fitch* | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| adidas | A- | C+ | 0% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| ALDI Stores | C- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ally Fashion* | F | F | 100% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| Anthea Crawford* | C | C- | 100% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| APG & Co | A- | B- | 1-25% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Arcadia Group | C+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| AS Colour | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| ASICS | C+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| ASOS | B+ | C- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Bardot | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Barkos Clothing | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ben Sherman Australia | C+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Best & Less | C- | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Betts Group | C | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Big W | D- | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Billabong | C | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Bloch* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Blue Illusion | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Boden | C | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Boohoo | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Brand Collective (Apparel) | C | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Brand Collective (Footwear) | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Bras N Things* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Coles | C | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Common Good | A+ | A+ | 100% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| Cotton On Group | A | B | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Country Road Group | A- | B- | 76-99% | 0% | 0% | 0% | 76-99% | 0% | 0% | 0% | 0% |
| Cue | C | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| David Jones | B- | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| De Vere Textiles (RUBY Apparel) | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Decjuba* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Designworks | C | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Esprit | B+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Etiko | A+ | C- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ezibuy | A+ | A+ | 100% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| Factory X | C+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Farmers* | D- | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Fast Future Brands | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Forever 21 | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Forever New | B- | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Freeset | A+ | A | 100% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| Fruit of the Loom* | D+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Gap Inc. | B- | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Gazal* | D- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| General Pants Group | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Gildan Activewear | B+ | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Gorman | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| H&M | B+ | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Hallenstein Glasson Holdings | B+ | C+ | 1-25% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Hanesbrands | A- | B- | 51-75% | 0% | 0% | 0% | 76-99% | 0% | 0% | 0% | 0% |
| House of Quirky* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Hugo Boss Group | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Icebreaker | A+ | A- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Inditex | A- | B- | 1-25% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Industrie | B+ | B+ | 1-25% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Jeanwest | B+ | D+ | 1-25% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| JETS | C | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Just Group | C+ | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

Key: YES PARTIAL NO 100% 76-99% 51-75% 26-50% 1-25% 0% * = non-responsive companies

SURVEY DATA

WORKER EMPOWERMENT RAW MATERIALS PRODUCTION

K-Z

OVERALL GRADE

WORKER EMPOWERMENT GRADE

WAGES

- Q1** Has the company developed a living wage methodology and calculated a living wage for each region that it operates in?
- Q2** Has the brand published a commitment to pay living wages, which is timebound and measurable, including a methodology or benchmark?
- Q3** What percentage of facilities have projects to improve wages?
- Q4** What percentage of facilities pay a living wage?

WORKER VOICE

- Q1** What percentage of facilities are known to have independent democratically elected trade unions and/or collective bargaining agreements?
- Q2** Are all workers trained on their rights regarding freedom of association?
- Q3** Does the company have a functioning grievance mechanism which workers can access anonymously and in their native language?
- Q4** Are workers trained on their rights and entitlements, including how to use grievance mechanisms?

CHILD & FORCED LABOR REMEDIATION PLAN

- Q1** Where child labour and/or forced labour is found to exist, does the company consult with credible civil society organisations in developing a plan for redress?

| Company | Overall Grade | Worker Empowerment Grade | Q1 (Wages) | Q2 (Wages) | Q3 (Wages) | Q4 (Wages) | Q1 (Voice) | Q2 (Voice) | Q3 (Voice) | Q4 (Voice) | Child & Forced Labor |
|--------------------------|---------------|--------------------------|------------|------------|------------|------------|------------|------------|------------|------------|----------------------|
| K&K* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Karen Walker* | C | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Kathmandu | A | B+ | 0% | 1-25% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Kmart | B+ | D+ | 0% | 100% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Kookai | B- | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Kowtow | A | A+ | 0% | 100% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| L Brands* | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lacoste | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Levi Strauss & Co* | B- | D- | 0% | 100% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Lorna Jane | C | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lowes* | D- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Lululemon Athletica | A- | C+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Macpac | B | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Marks & Spencer | B | D | 0% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Max* | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Mighty Good Group | A+ | A+ | 0% | 100% | 0% | 0% | 100% | 0% | 0% | 0% | 0% |
| Munro Footwear Group | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Myer | C+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| New Balance | B | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Next | B- | D- | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0% |
| Nike | B- | D- | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0% |
| Noni B Group | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Nudie Jeans | A- | B- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Outland Denim | A+ | A+ | 0% | 76-99% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Oxford | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Patagonia | A | B- | 0% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Pavement United Brands* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Postie+ | C | C- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Puma | B | D+ | 0% | 0% | 100% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| PVH Corp* | B- | D | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% | 0% | 0% |
| R.M. Williams | B | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ralph Lauren* | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Retail Apparel Group | C+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Rip Curl | B+ | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Rodd & Gunn | B | C- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Roger David | D- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| RREPP | A | B+ | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Seafolly | B- | D | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Seed Heritage | C- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Simon de Winter Group | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Specialty Fashion Group | C+ | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Sussan Group | C+ | C- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| T&T* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Target Australia | B | D+ | 0% | 0% | 0% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| THE ICONIC* | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| The PAS Group | C- | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| The Warehouse Group* | C | D- | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Tigerlily* | D | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Tree of Life | C | D+ | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Trelise Cooper* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| UNIQLO* | D+ | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| VF Corp | B | D+ | 0% | 0% | 100% | 0% | 1-25% | 0% | 0% | 0% | 0% |
| Voyager Distributing Co* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Wish Designs* | F | F | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Zimmermann | C+ | C | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |



RAW MATERIALS PRODUCTION

Key: YES PARTIAL NO 100% 76-99% 51-75% 26-50% 1-25% 0% * = non-responsive companies

Appendices

STATEMENTS FROM NON-RESPONSIVE COMPANIES

Of the 114 company surveys covered in our 2018 report, 27 companies chose not to engage with our research and they have been listed as “non-responsive”. Each non-responsive company was offered the chance to include a short statement in The Report, regarding its decision not to participate in this research. The following eight companies provided statements:

Fruit of the Loom

“Respect for people is very important at Fruit of the Loom, and we are committed to conduct our business in an ethical manner, ensuring respect for human rights and the law. We take pride in creating an environment where both our employees and the business can be successful. To be able to achieve this, we have created a set of rules and standards called our Code of Conduct that we require all factories making our products to abide by. This key component to our CSR program is monitored through a comprehensive supplier assessment process.

The mission of our CSR Program is to go beyond factory assessments to drive continuous improvement toward sustainable operating practices throughout our supply chain. The commitment to this mission exists at the highest level of our organization.

In addition, we are committed to the safety of factory workers. In fact, Fruit of the Loom is the only U.S. Company to support both of the two major initiatives supporting Bangladesh Worker Safety: The Accord on Fire and Building Safety

in Bangladesh and The Alliance for Bangladesh Worker Safety.

Additional information can be found by visiting our Corporate Social Responsibility website at <http://www.fotlinc.com/pages/corporate-social-responsibility.html>”

House of Quirky

“House of Quirky accepts that due to late submission to the 2018 Ethical Fashion survey we were given an F grading, and have addressed this internally to ensure future forward Baptist World Aid Australia reports will accurately reflect our company. House of Quirky go to every effort to guarantee each member of our team is supported and working in a safe environment. As a business, we believe that everyone should be treated with equal respect, and are proud of our selection of external suppliers ensuring they operate in an ethical manner. We take our responsibility seriously as a leading Australian fashion house constantly monitoring our supply chain, committing to a journey of continuous improvement at every stage in our production line.”

THE ICONIC

“THE ICONIC is deeply committed to social and environmental responsibility, and to ensuring that we live up to the values on which our company was founded.

Although we are a young business at the beginning of this journey, we are focussed on building systems and processes to articulate our supply chain expectations and are working proactively to ensure they are implemented. We recognise the role we play in understanding and improving conditions within the supply chain and will share more information about what we are doing with our stakeholders as our journey progresses.

We praise the efforts made by Baptist World Aid Australia, and the value that this report provides to our industry, enabling customers to learn more about the brands they buy and prompting our industry to engage in constructive dialog leading to broader action and collaboration to improve working conditions in supply chains.

The completion of the questionnaire behind this report requires significant resources however and at this stage in our journey we believe we can

STATEMENTS FROM NON-RESPONSIVE COMPANIES

make a greater contribution to the improvement of actual working conditions by spending time on the ground visiting our factories, understanding the reality for workers and training our team to incorporate these considerations when buying product for THE ICONIC.

For more information about the work we are doing around ethical trade which we will update regularly, please see our website <https://www.theiconic.com.au/about/>

Karen Walker

“We’ve chosen to not participate in the survey this year for several reasons.

We’re extremely happy with where we’re at in terms of our manufacturing and sourcing and the progress we’ve made in the last 12 months. We’re very confident in our plan going forward.

Whilst this survey has been useful to us over the last two years in terms of suggestions around our manufacturing and sourcing we feel that we have gotten all the assistance we can from it. We’ve now appointed a specialized social responsibility consultant to work closely with us moving forward to continue to find ways we can review and improve our processes. Unlike the survey, this company understands boutique brands of our size and areas of expertise.

We find the survey to be inconsistent and unreliable in many ways.

Our 2018 grade in this survey, compared with 2017’s grade, doesn’t reflect our social

responsibility systems and ethical standards or the continued progress we’ve made in the last 12 months, it merely reflects what information we choose to make available on our website. We’re always happy to answer any questions directly from our community with regard to our social responsibility via: <https://www.karenwalker.com/social-responsibility/>.”

Max

“Max appreciates the work Baptist World Aid Australia and Tearfund do in researching and reporting on Corporate and Social Responsibility (CSR) systems. Max is committed to an active programme to provide a safe and fair working environment for the employees of our suppliers. Max uses a small number of reputable factories in China, where regulations and controls are more stringent than some other markets, and 100% of our factories are regularly audited by independent specialists. We have chosen not to participate in the Baptist World Aid Australia and Tearfund survey this year as we have taken the decision to make our information available directly to the public. This can be found at https://www.maxshop.com/Social-Responsibility_1524.aspx

We believe that by providing open, transparent information to our customers and other interested parties, a more comprehensive understanding of our CSR processes and policies can be gained in a direct manner. Max remains committed to regularly updating our CSR information online so interested parties can stay up-to-date with the improvements we continue to make in this important area.”

Pavement United Brands

“Pavement United Brands is committed to ethical and sustainable work and supply chain practices. We strive to ensure a safe and fair working environment for all of our employees, and the employees of our suppliers.

We currently manufacture the majority of our products in South China, where we employ a small local team to oversee production and factory operations. This team visits our supplier factories regularly and are required to report back if they witness any unsafe or unfair practices. In the instance where there is a breach of our code of ethics, Pavement United Brands will immediately cease a relationship with that supplier.

We no longer manufacture any goods in Bangladesh, or other countries where unethical work practices occur regularly.

We comply with Australian Occupational Health and Safety law in all areas of our business in this country. We regularly liaise with our offshore suppliers to ensure that safety is of the highest priority in their production facilities.”

Tigerlily

“Ethical sourcing and sustainability has been an integral part of our brand for many years. We pride ourselves on the relationships with our supplier factories in China and India, and we continue to work with independent auditors to maintain full transparency and accountability of these factories. We also work closely with Indian artisans and are

STATEMENTS FROM NON-RESPONSIVE COMPANIES

passionate about supporting the economic and social well-being of these skilled workers and their communities.

We are also continuing to explore more sustainable fibres and print processes, and our current collection is our most sustainable yet:

- Close to 50% of our swimwear is now made using recycled fibres
- 60% of our print fabrics are certified by OEKO TEX which confirms that no toxic chemicals have been used in their production
- We have increased our offer of Indian hand-loomed textiles to 30%

While we are strongly committed to making positive changes to our supply chain, we admit that we have more work to do. In 2017, the Australian Fashion Report rated the Tigerlily brand C+ and we have continued to improve our practices in the last 12 months. However, due to the recent changes of ownership and our transition away from the Billabong Group we did not provide information for the 2018 report and have subsequently received a D rating.

Not providing information was not a decision we made lightly, but knowing that we are improving our sustainable and ethical practices in all aspects of our business gives us comfort that we are allocating the resources to where they will reap the most benefit for the industry we love so much.”

The Warehouse

“The Warehouse has had an active Ethical Sourcing programme since 2004. We are proud of our efforts to improve working conditions in factories. We commend Tearfund and Baptist World Aid Australia for their work researching this important topic and acknowledge that their “Behind the Barcode” reports have informed the design and scope of our programme. We have chosen not to participate in the survey and have focused instead on providing deeper disclosures and commentary direct to our customers and public via our Ethical Sourcing Report. This is available at www.thewarehouse.co.nz. Anyone is welcome to read this report and convey questions or commentary to us at ethical.sourcing@thewarehouse.co.nz”

Baptist World Aid Australia is grateful for the time that companies have taken to provide these statements and welcomes their input. It remains open to working with all companies assessed by The Report, to better understand the systems they have in place to ensure workers are not being exploited.

Baptist World Aid Australia appreciates that companies of all sizes have engaged, with most finding the process of being benchmarked and gaining feedback helpful. Strong systems, matched by full, open, and honest disclosures by companies (preferably public) continue to be the best way for consumers to evaluate that companies are taking the appropriate measures to address exploitation in their supply chain.

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ABOUT BAPTIST WORLD AID AUSTRALIA

Baptist World Aid Australia is an international aid and development organisation, with a vision to see a world where poverty has ended, where all people enjoy the fullness of life God intends.

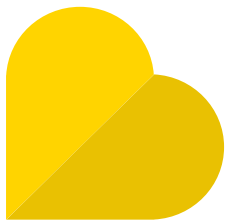
In order to achieve this vision, Baptist World Aid Australia works through two equally important partnerships:

- It partners with like-minded agencies overseas to empower communities to lift themselves out of poverty, challenge injustice and build resilience; and
- It partners with Christians and churches in Australia, particularly those from the Baptist movement, in generous giving, ethical consumption, courageous advocacy and faithful prayer in order to achieve justice for people living in poverty.

Established in 1959, Baptist World Aid Australia works with local partners in 25 countries in the Pacific, Middle East, Southeast Asia, South Asia and Africa. Its activities cover four key areas:

- Community Development projects build lasting solutions to poverty for entire communities;
- Its Child Sponsorship program assists children to break down the barriers of poverty — for themselves and their whole community;
- Its work in disaster saves lives before, during and after a disaster strikes; and
- Baptist World Aid Australia stands with the oppressed and marginalised, advocating for a more just world.

Baptist World Aid Australia has been campaigning various industries to end worker exploitation for over nine years, beginning its research into the fashion and electronics industries in 2010. This report is the fifth of its kind.



**BAPTIST
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Be love. End poverty.

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We would like to thank our volunteers who contributed many hours of research and support for this project over the last 12 months. Alexandra Turner, Erica Walter, Hannah Mercer, Caitlin Chisholm and Annabel Burnett — we could not have completed this project without your efforts!

We are grateful to every representative, from each of the companies that engaged with our research this year. Thank you for the time and extraordinary effort which went into collating and sharing data with us.

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Our thanks also go to Better Cotton Initiative, Ethical Clothing Australia, Global Organic Textile Standard and Fairtrade Australia, for helping us to better understand your systems.

Thank you to our Report Sponsor, Baptist Insurance Services, and to our church partners who have financially supported the work of our Behind the Barcode project, enabling us to grow the breadth of our research — Erina Community Baptist Church, Northside Baptist Church, and Seaforth Baptist Church.