



Animal Welfare in Fashion 2023

Towards a truly ethical and
transparent fashion industry

Highlight: key findings

For brands selected in 2023

61%

disclosed that they **used at least some* animal-derived materials** certified to recycled or animal welfare standards.

38%

disclosed that they were **committed to fully certified non-mulesed wool** by a set date.

15%

were rated **'Good' or 'Great'** (scoring 75+) for 'animals' by Good On You.

4%

disclosed that they were **invested in the development of next-generation materials**.

3%

disclosed that they **aimed to reduce their reliance on one or more virgin animal-derived materials**.



Comparative results 2021-2023

Of the 93 brands selected in 2023 that used animal-derived materials, **72 brands (77%)** had animal welfare policies, compared to **65%** for the same brands selected and rated in 2021.

17% of the brands selected in 2023 have improved their Good On You rating, for their impact on animals since 2021

Of the 7 brands rated in 2021 that used fur and were rated again in 2023, **3 brands** have pledged to go fur-free.

In 2021, a survey conducted by YouGov and commissioned by FOUR PAWS found that the demand for animal-free fashion – as well as higher quality and more durable items with higher animal welfare credentials – was rapidly growing due to animal welfare and environmental concerns among consumers. This movement had evidently gained traction since the Covid-19 pandemic. It is, therefore, not surprising that our report in 2023 found more brands to have engaged and made significant progress in improving animal welfare. Even the luxury segment, which dominated our 'worst brands' list in our 2021 report, has made some notable progress.

Nevertheless, the progress, while significant, is far from enough. With five billion animals used in fashion annually

and only 9% of brands using certified materials for either half or the majority of all animal-derived materials used in their supply chains, there is an urgent need for fashion brands to step up and take meaningful action for animals. In addition, reduced use is paramount if the industry is to operate within planetary boundaries.

Only a small fraction of brands disclosed that they were invested in material innovations or aimed to replace virgin animal-derived materials with their certified recycled counterparts. It is these two mutually reinforcing factors however that would help the industry to overcome barriers to scale and adoption and secure an animal and climate positive future in fashion.

*For most of the selected brands that claimed to use certified materials, these materials only made up a minority of all animal-derived materials used in their supply chains. Only 9% of these brands disclosed that they were certified for 50% or more of their total animal-derived materials.

Highlight: brand progress in animal welfare


Best and Worst for animal welfare 2023

Best



- 1 NIKIN
- 2 Patagonia
- 3 KiK
- 4 Missguided
- 5 Icebreaker
- 6 Stella McCartney
- 7 Another Tomorrow
- 8 ARMEDANGELS
- 9 TJ Maxx
- 10 NAGNATA

Worst



- 91 Adidas
- 92 Ralph Lauren
- 93 Louis Vuitton
- 94 New Balance
- 95 Nike
- 96 Michael Kors
- 97 Hermès
- 98 Prada
- 99 Max Mara
- 100 SHEIN

Brands that scored well in the animal welfare pathway of the Good On You rating system:

- Limited the types of animal-derived materials they used in their supply chains;
- Had meaningful animal welfare policies; and
- Had achieved considerable progress or been completely successful in sourcing animal-derived materials that were certified to recycled material and/or animal welfare standards.

The key factors that contributed to a rating of 'Very Poor' or 'Not Good Enough' for 'animals' by Good On You were:

- the use of many animal-derived material types in brands' supply chains, the majority of which was not certified to recycled or animal welfare standards;
- the use of one or more 'higher risk' animal-derived materials such as fur, angora wool, or exotic skins (including crocodile, python or kangaroo, exotic decorative feathers, horn, and camel or yak hair); and
- very little transparency about the materials used by brands.

FOUR PAWS PAWSome Fashion Awards



Top Scoring PAWSome Fashion Brand

NIKIN

Since their inclusion in our 2021 report, NIKIN has clearly communicated their position on animal-free fashion.



Most Transparent PAWSome Fashion Brand

Stella McCartney

Stella McCartney is leading the way in materials disclosure, including the environmental impacts of animal-derived materials.



Most Improved PAWSome Fashion Brand

Missguided

Missguided has improved their rating to Good since 2021 and avoided the use of animal-derived materials (they previously used wool, leather, and down).



Animal Welfare Pioneer PAWSome Fashion Brand

Another Tomorrow

Another Tomorrow is championing progress for animals in fashion like no other brand. They set up a customer-driven petition to campaign against mulesing and are working towards a slaughter-free wool supply chain.



Most Committed PAWSome Fashion Brand

G-Star RAW

By 2030, all virgin animal-derived materials used by G-Star RAW will be fully certified recycled.



Executive Summary

FOUR PAWS, in partnership with Good On You, has developed the third edition of the Animal Welfare in Fashion report to highlight animal welfare as a vital component of sustainable fashion and provide key insights on how the industry is currently performing and can achieve further progress. In 2023, FOUR PAWS rated 100 brands across 15 countries using Good On You's methodology for 'animals', 90 of which were rated in our previous report in 2021. Here is what we found.

Further progress has been made on animal welfare in fashion since our last review in 2021.



(77%) had animal welfare policies. This is a 12% increase when comparing the same brands from 2021. Additionally, **17% of the selected brands had moved to a higher Good On You rating category for 'animals' since 2021.**

When it came to the two most frequently used animal-derived materials (wool and leather), **over a third (38%) of the selected brands disclosed that they were committed to fully certified non-mulesed wool by a set date**, while a handful (5%) of brands disclosed that they were committed to achieving full traceability in their leather supply chains by a set date.

More refined choices and therefore greater transparency by brands about the usage of animal-derived materials.

In 2023, 50% of the brands we selected to be rated reported on their usage of at least some animal-derived materials. More frequent reporting by brands was facilitated by the uptake of 'preferred' materials for at least a portion of their animal-derived materials, i.e. materials certified to recycled and animal welfare standards.

The use of certified wool and down were the most frequently disclosed animal-derived material types. Under a third (30%) of brands used at least some animal-derived materials certified to recycled material or animal welfare standards.

Of the 43 selected brands that were found to use certified wool, 31 (72%) reported on the amounts of certified wool. Similarly, of the 34 selected brands that were found to use certified down, 21 (62%) reported on the amounts of certified down.



Despite recent progress, efforts by brands have not gone far enough.

While there has been a proliferation of certifications to recycled and animal welfare standards in recent years, most of the selected brands that disclosed their use of certified or recycled materials did so for only a minority of their animal-derived materials. **Only 9% of brands disclosed that they were certified to recycled or animal welfare standards for 50% or more of their total animal-derived materials.**

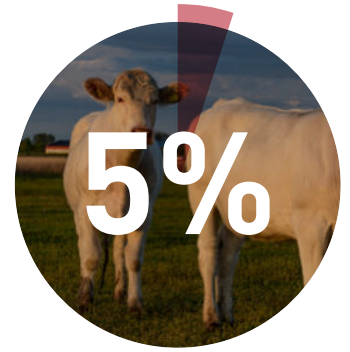
Meanwhile, **brands selected from the luxury and sports market segments remained the animal welfare laggards**, performing well below the average for brands across the total sample. Selected brands across the luxury and sports market segments achieved an average score of just 30% and 41% respectively. Overall, their poor results were largely attributed to:

- ✘ a lack of animal welfare policies and/or little to no transparency over the animal-derived materials used by brands;
- ✘ the use of many animal-derived material types in brands' supply chains, with most of these not certified to recycled or animal welfare standards; and
- ✘ the use of wild animal materials such as fur and exotic skins including crocodile, python, or kangaroo, and no commitments in place to end their use.

The commercial exploitation and trade of wild animals is associated with incalculable risks to public health. Wild animals – both in their natural habitats and in captivity – play an important role in the development of emerging zoonotic diseases. Additionally, the intensive farming of fur bearing animals in small cages poses serious risks to public health. **Despite this, 17% of brands were found to still use wild animal materials such as fur, exotic skins from crocodile, python or kangaroo, and exotic decorative feathers.**



Moreover, there continued to be a lack of action around the use of leather. **While 83% of the brands selected used bovine leather, only 5% of the selected brands indicated that they were working to achieve traceability to the farm level by a set**



date. Despite the many animal welfare concerns for cattle, there remain no leather-specific animal welfare certifications that can provide assurances at each step of the production process from farm to final product. While many of the brands selected had policies requiring leather to come from food production, only 2% required leather that was certified to food standards. Meanwhile, **just 2% of the brands selected disclosed that they were engaged with initiatives aimed at improving animal welfare in leather supply chains.**

Despite the urgent need for brands to significantly reduce their reliance on virgin resources, and the increased recognition that the use of animal-derived materials was disproportionately significant to brands' carbon emissions, only 3% of the brands selected indicated that they are committed to reducing their reliance on one or more virgin animal-derived materials. Additionally, just 4% of the brands selected disclosed that they were invested in the development of next-generation material innovations.

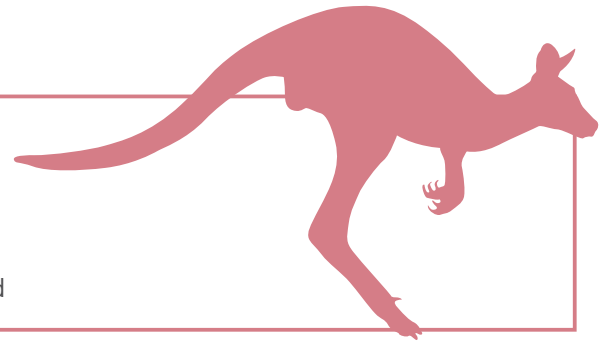
Furthermore, 11% of the brands selected that used some portion of certified animal-derived materials disclosed that they advocated for animal welfare improvements within these standards or directly in their supply chains. Meanwhile, 52% of the brands selected that were found to use wool had not yet published timebound commitments to use only fully certified non-mulesed wool.

While the challenges for animal welfare in fashion cannot be solved overnight or by brands alone, **there are practical steps that can be made today to improve animal welfare outcomes for the billions of animals around the world impacted by fashion.**

Recommendations for brands

FOUR PAWS recommends that brands:

1. Introduce meaningful animal welfare policies
2. Transparently disclose the volumes of animal-derived materials used



1. Meaningful animal welfare policies

With evidence of animal cruelty repeatedly and continually found in animal-based industries, and ever-increasing scrutiny on brands regarding their sustainability claims, the development of meaningful animal welfare policies is more important than ever. A meaningful animal welfare policy starts with a vision and includes an implementation plan for how to achieve and monitor good animal welfare and transparency. Brands must recognise that animal-based supply chains also have associated environmental and human rights risks. Thus, brands should ideally consider animal welfare policies as an integral part of their wider sustainability and social responsibility objectives.

A set of measurable and timebound goals should be communicated as part of the implementation plan for how brands commit to achieve their selected vision. Goals should include commitments to the **'3 R's': Refine, Reduce, and Replace**. These include commitments to:

- Using **only fully certified animal-derived materials**, i.e. refining in the use of animal-derived materials;
- Lowering reliance on animal-derived materials by increasing the use of lower impact animal-free material types – or by finding ways to reduce the levels of production overall including products made from animal-derived materials, i.e. **reducing the use of animal-derived materials**;
- **Investing in the development of next-generation materials**, i.e. replacing the use of animal-derived materials.

Brands can demonstrate how they intend to implement their goals and achieve their vision by outlining:

- The types of animal-derived materials they allow today and, in the future, in conjunction with a statement that highlights all other materials as prohibited;
- The types of certifications that brands require for each animal-derived material type;
- Activities that promote their efforts to advocate for animals e.g., whether brands are signed to the [Fur Free Retailer](#) programme or the FOUR PAWS [Brand Letter of Intent](#) against mulesing, donate to animal causes, raise consumer awareness on animal issues, or take part in multi-stakeholder initiatives such as the Textile Exchange Animal Welfare Round Table;
- Their initiatives to improve animal welfare standards, e.g. engaging with supply chains all the way to farm level or investing in basic animal welfare requirements not mandated by certification standards (such as adequate shelter or more regular veterinary care).

2. Transparency

The development of a meaningful animal welfare policy has little value to brands if they fail to take steps to monitor and evaluate the progress of its implementation and report on the effectiveness of the policy.

Therefore, the final step to ensuring a meaningful policy is to communicate the progress of each of the brand's activities and goals, including the:

- total weight of animal-derived materials by type;
- percentage of animal-derived materials by type as a proportion of total materials by type;
- percentage of certified animal-derived material by type as a proportion of total animal-derived materials by type; and
- percentage of certified animal-derived material per certification used.

Qualitative information to further demonstrate brands' progress is also ideal. For example, the types of activities and initiatives that brands undertook throughout the reported year to advocate for animal welfare improvements amongst consumers or in their supply chains, any lessons learned, the outcomes or impacts from these initiatives, and brands' plans to continue or build on such activities.



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For more information, brands can refer to the **FOUR PAWS**

[Animal Welfare Policy Development Guidelines for Fashion Brands and Retailers.](#)

Contents

Highlight: key findings	2
Highlight: brand progress in animal welfare	3
Executive Summary	5
Foreword	10
Introduction	11
Report methodology	13
Selecting brands	13
Rating brands	14
Results	23
Brand results overview	27
Country results: United States of America	32
Country results: United Kingdom	34
Country results: Germany	35
Fashion's progress on animal welfare: the 'good'	36
Fashion's progress on animal welfare: the 'bad'	38
Fashion's progress on animal welfare: areas for improvement	41
Conclusion	43
Recommendations	44
Developing a meaningful animal welfare policy	44
Transparency	45
Good On You 'animals'	46
References	52

Foreword

It is with a welcome hint of optimism that I provide my opening remarks for this year's *Animal Welfare in Fashion* Report. Looking back since the launch of our fashion-focused Wear it Kind programme in 2020 and the release of our first global report in 2021, I'm proud to say that FOUR PAWS has continued to chart a positive path for progressing animal welfare worldwide.

The FOUR PAWS legacy began with the goal to end the cruel and unnecessary fur trade in Europe, and together we continue to move evermore towards our vision of an animal-friendly fashion future. Just this year, the European Citizens Initiative (ECI) #FurFreeEurope collected more than 1.5 million signatures in support of an EU-wide end of fur farming and sales. Coordinated by Eurogroup for Animals and supported by more than 80 organisations, FOUR PAWS was a major driver in making it one of the most successful initiatives since the petition instrument was introduced in the EU in 2012.

At the same time, FOUR PAWS has contributed to important wins for domesticated animals. With the support of athletes, activists, and Nike customers worldwide, we successfully campaigned for the global sportswear giant, Nike, to end its use of mulesed wool. This singular decision sent a loud message to the Australian wool industry that mulesing over 10 million lambs each year must end.

Furthermore, with our 35 years' experience engaging with the textiles, food, and other sectors, we helped to influence the introduction of animal welfare requirements into the *OECD Guidelines for Multinational Enterprises on Responsible Business Conduct*. For the first time, animal welfare will be consistently recognised as a necessary component of responsible business across the 38 member countries of the OECD.

We acknowledge that these milestones, and the many actions of brands over the course of the past two years to better certify their supply chains and take up next-gen materials, have all been necessary first steps.

However, there is much room for improvement, and what we do not know we cannot change. This is why FOUR PAWS continues to partner with Good On You to bring analytical rigour and evidence-based research to report on the state of animal welfare in fashion.

FOUR PAWS and Good On You both work to drive change towards a more responsible and transparent fashion industry, and we extend our thanks to Good On You for their proactive efforts to include animal welfare within their sustainability framework.

In turn, I invite you to consider what we have uncovered in this report. Let it be an opportunity to acknowledge and reflect upon your own journey with respect to animal welfare and use the insights within to decide where you can commit to do better for animals in fashion.



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A handwritten signature in black ink, appearing to be 'MS' with a stylized flourish.

Martina Stephany

Senior Programme Officer, FOUR PAWS

Introduction

Today, the landscape for animal welfare in fashion is a mixed one. On the one hand, progress by the fashion industry in recent years has been significant, and we have seen record engagement of the fashion industry with animal welfare issues and initiatives in the last two years. For this report alone, we engaged with almost 60% of the fashion brands that were rated. Unfortunately, as is the case with wool and leather production, piecemeal efforts have meant that progress overall has not gone far enough, nor has it happened fast enough.

Fashion brands are not only grappling with animal welfare, but are also racing against the clock to reduce their carbon emissions, become more circular, and to better protect biodiversity¹. However, this is no small feat. Material production alone is responsible for between 25% and 40% of the fashion industry's carbon emissions (with yarn and fabric preparation and wet processes accounting for another 30%). This has the most significant environmental impact across the fashion lifecycle².

Therefore, material choice by brands plays a key role, and while animal welfare is receiving more attention by brands, commitments to end the use of animal-derived



materials altogether are yet to be publicly communicated. Purely based on numbers, this could be considered understandable as animal-derived materials make up less than 8% of the main fibres used in fashion³.

As animal-derived materials are derived from sentient beings and are proven to have devastating impacts on the environment, these material choices cannot be ignored. More than three quarters (77%) of habitable land converted for agriculture is used for livestock production⁴. It is animal agriculture that contributes at least 16.5% of the world's total greenhouse gas emissions (GHGs)^{5,6}. Livestock emissions are responsible for a staggering 32% of all human-induced methane emissions⁷.

And the numbers of animals involved per year to produce fibres and leather for fashion are simply astonishing. It is estimated that over five billion animals are used every year for the fashion industry⁸. Fine wool, although it comprises just 1% of the world's main fibres used for fashion, is produced from about 50% of the global population of sheep^{3,9}.

To complicate matters further, no more than 4% of the global supply of animal-derived materials per type are certified to animal welfare standards. While animal welfare certifications have helped to mitigate the risks of cruel practices in certified supply chains (such as mulesing in wool production and live plucking in down and feather production), most certifications are currently lacking in requirements which are crucial to animals' overall positive mental state¹⁰.

When it comes to leather, the second-most frequently used animal-derived material amongst brands sampled in our report (behind the use of wool), there are no certifications available to provide animal welfare and traceability assurances from farm to final product in leather supply chains. Nonetheless, the intensification of cattle farming can be expected to increase alongside the industry's collective efforts to respond to certain climate reduction

targets such as deforestation. It is this intensification, however, which is of major concern to cattle welfare: a system of mass production that is underpinned by routine mutilations such as dehorning and castration. Therefore, regardless of the extent to which the global supply of animal-derived materials is certified, raising the bar on animal welfare requires going beyond certification.

Just as transformative change to fashion's systems is at the heart of our response to the global climate emergency¹¹, transformative change to our agricultural and food systems (by massively scaling down animal agriculture) is critical to our ability to limit global warming and make it possible for the animals that continue to be farmed to live to an excellent standard of welfare.

Transparency is the other cornerstone for driving the profound and meaningful change that is needed to safeguard animals, people, and our planet. Brands which are leading the way in transparency have reported that their use of animal-derived materials – with its significant environmental footprint across all stages of production – is disproportionately responsible for carbon emissions when



compared to the most frequently used materials such as cotton and man-made cellulosic fibres (MMCFs). As more reporting on the environmental impacts of brands' material choices become available, it is brands themselves that will demonstrate the need to re-think the use of animal-derived materials.

At the same time, positive developments in the global fashion landscape in recent years have the potential to benefit the animal welfare movement greatly, particularly:

- The growing demand for sustainable products, especially by younger cohorts of consumers who are willing to spend more in values-based purchasing decisions^{2,12,13};
- The increasing scrutiny and regulation of brands' sustainability claims^{14,15};
- policies aimed at making textiles recyclable by 2030¹⁶; and
- The hundreds of material innovations being patented year-on-year².

It is these developments that have supported opportunities for FOUR PAWS to continually highlight:

- Changing consumer preferences towards brands that communicate animal welfare as part of their sustainability credentials, and by seeking products that have been made using higher welfare animal-derived materials or lower-impact animal-free alternatives¹⁷;
- Growing awareness around the environmental impacts of animal-derived materials in conjunction with shifting consumer attitudes towards mainstream animal-derived materials such as wool and leather^{10,18};
- The importance of meaningful animal welfare policies in ensuring brands can back up their animal welfare claims; and
- The need for brands to reduce their reliance on virgin animal-derived materials, ideally through textile-to-textile recycling alongside investment in the development of next-generation alternatives, as it is these factors together that could help to generate the urgently needed systems change for the five billion animals used for fashion each year^{8,19,20}

Report methodology

Selecting brands

Through this report series, we aim to benchmark the global fashion market with respect to animal welfare every two years. This enables sufficient time for us to engage directly with fashion brands and provide our expertise on how brands can bring about lasting and meaningful change for animals in fashion, and for brands to review and update their policies and practices in consideration of our advice.

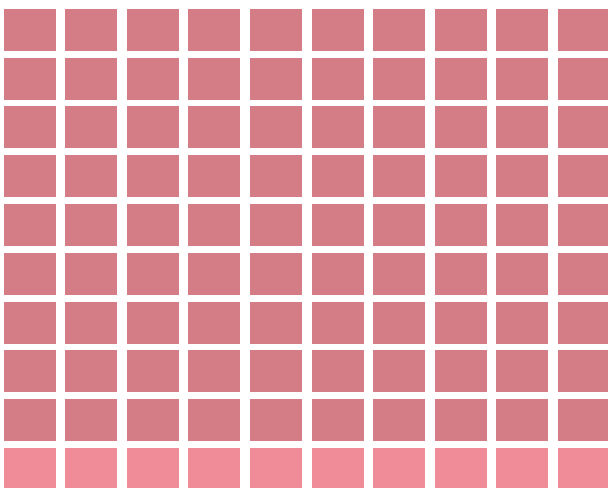
With input from experts in our national offices in the United States (USA), United Kingdom (UK), Germany, Switzerland, Netherlands, Australia, and South Africa, we developed an international sample of **100 fashion brands** originating from **15 countries**, 90 of which were rated in our 2021 report.

Our sample provides representation across nine fashion market segments: **luxury, sports, outdoor, online or 'digital-first' retailers, supermarket / chain retailers, department store retailers, mid-point / premium, fast fashion, and sustainability champions.**

Sustainability champions are those brands that have been created from their inception with a purpose to address sustainability issues in fashion and seek to offer customers an alternative to today's fast fashion.

The brands selected may be considered leading brands at a global scale and/or in their respective countries' markets and may have international reach in their respective market segments. The largest brands were chosen from a variety of independent sources, including Fashion United Top 100²¹, the Lyst Index²², Deloitte Global Powers of Retailing²³, Financial Times Top 100 Global Brands²⁴, Apparel 50²⁵, and Retail Index Top 10 EU.

100 brands



15 countries



9 fashion market segments



Rating brands

Good On You ratings overview

The progress of each brand in animal welfare was measured using the Good On You rating system. The Good On You rating system assesses the impacts of fashion brands in three areas: animals, people (labour), and environment. Each brand receives an individual rating for its performance in each of these three areas. Brands also receive an overall rating, which considers the aggregated data across the three key areas.

Good On You ratings are used by consumers around the world to learn how their favourite brands rate on the issues they care about and to discover new sustainable fashion brands and products. On the Good On You app, brands are allocated one of five ratings (shown below).

Table 1: Good On You scores and categories

Brand rating (as it appears on the Good On You app)	Scoring range
● Great ●	90-100 %
● Good ●	75-89 %
● It's a Start ●	60-74 %
● Not Good Enough ●	10-59 %
● Very Poor ●	0-9 %

For the purposes of this report, we are only concerned with brand performance based on the 'animals' section of the Good On You rating system. In this report, we refer to the 'animals' score as a percentage out of 100. However, it should be noted that ratings in the Good On You app correspond with a score out of 5.

For each key area, Good On You considers the most important and impactful issues or 'materiality'. The most important issues are identified based on the organisation's own research in collaboration with industry and academic experts, and relevant civil society organisations and certification schemes.

The Good On You brand rating system aggregates data from external third-party indices, certifications and standards systems, as well as publicly available information

including from brands' own reporting to assess their performance against each material issue. For the 'animals' rating, these may include: i) policies e.g. animal welfare, sourcing / purchasing, Code of Conduct; ii) annual reports, e.g. sustainability or ESG, impact, and annual reports; iii) other website information where relevant, e.g. product information, sustainability section, company blog, parent company or corporate websites; and iv) other publicly available sources where relevant, e.g. the [FOUR PAWS Brand Letter of Intent against mulesing](#) brand list and [Fur Free Retailer](#) brand directory.

This year, FOUR PAWS was once again invited by Good On You to be a consultation partner in the review of their methodology for 'animals'. The brands in our sample for 2023 each received a percentage score for the extent to which they positively fulfilled the updated criteria in the 'animals' section of the Good On You rating system.

Changes to the Good On You 'animals' rating

Key changes were made to the 'animals' methodology based on the input provided by FOUR PAWS. New areas of assessment were introduced in line with the [FOUR PAWS animal welfare policy development guidelines](#), while other changes aimed to address some of the scoring limitations in the previous methodology which was used to rate brands in our 2021 report.

Other changes still reflected the developments in the fashion landscape that were relevant to animal welfare and the use of animal-derived materials. For example, substantial amounts of certified recycled animal-derived materials have become increasingly available to brands, as has the availability of specific virgin animal-derived materials certified to animal welfare standards. Some of these have been explained below.

While it falls outside of the scope of this report to list every change that was made to the Good On You methodology for 'animals', some of the key updates have been outlined below.

Table 2: FOUR PAWS policy recommendations for rating 'animals' in 2023

2023 Good On You methodology	Rationale for proposed change	2021 Good On You methodology
The use of cashmere, alpaca, and mohair can be treated in the scoring system in the same way as sheep wool.	Cashmere, alpaca, and mohair have comparable production practices to sheep wool. There is also the availability of similar animal welfare certifications.	The use of cashmere, alpaca, and mohair were penalised heavily due to being considered as 'higher risk' animal-derived materials.
Assessing brand performance in animal welfare should recognise the use of certified recycled materials as best practice for the use of animal-derived materials.	While there is no guarantee of the standard of welfare or the supply chain practices associated with the virgin material being recycled, recycled counterparts reduce brand reliance on virgin animal-derived materials, which means a lower environmental impact, while supporting the fashion industry to achieve its circular fashion goals.	For brands that produced items of clothing typically made from animal-derived materials, the non-use of a specific material type was awarded 100% of the points allocated to that material.
Assessing brand performance in animal welfare should recognise the use of animal welfare-certified materials not as, but rather as a practice of a higher standard for 'conventional' materials (i.e. leather, wool, cashmere, alpaca, mohair, and down).	The use of certified virgin animal-derived materials still entails greater costs when considering both the environmental and animal welfare impacts in comparison to recycled animal-derived materials.	Use of animal welfare-certified materials was recognised as the best practice for wool and down.
Assess brands on their commitments to the reduction or elimination of 'conventional' animal-derived materials (i.e. leather, wool, cashmere, alpaca, mohair, and down).	All animals should be afforded an excellent quality of life. According to FOUR PAWS, however, increasing standards of animal welfare to achieve such a goal requires a significant reduction in the overall numbers of animals being farmed. Since animal-derived materials represent a significant income source for producers, and the demand for animal-derived materials in fashion perpetuates the upward trajectory of farmed animals, publicly communicated commitments by brands to transition away from the use of animal-derived materials are necessary to achieve this goal.	Not assessed.

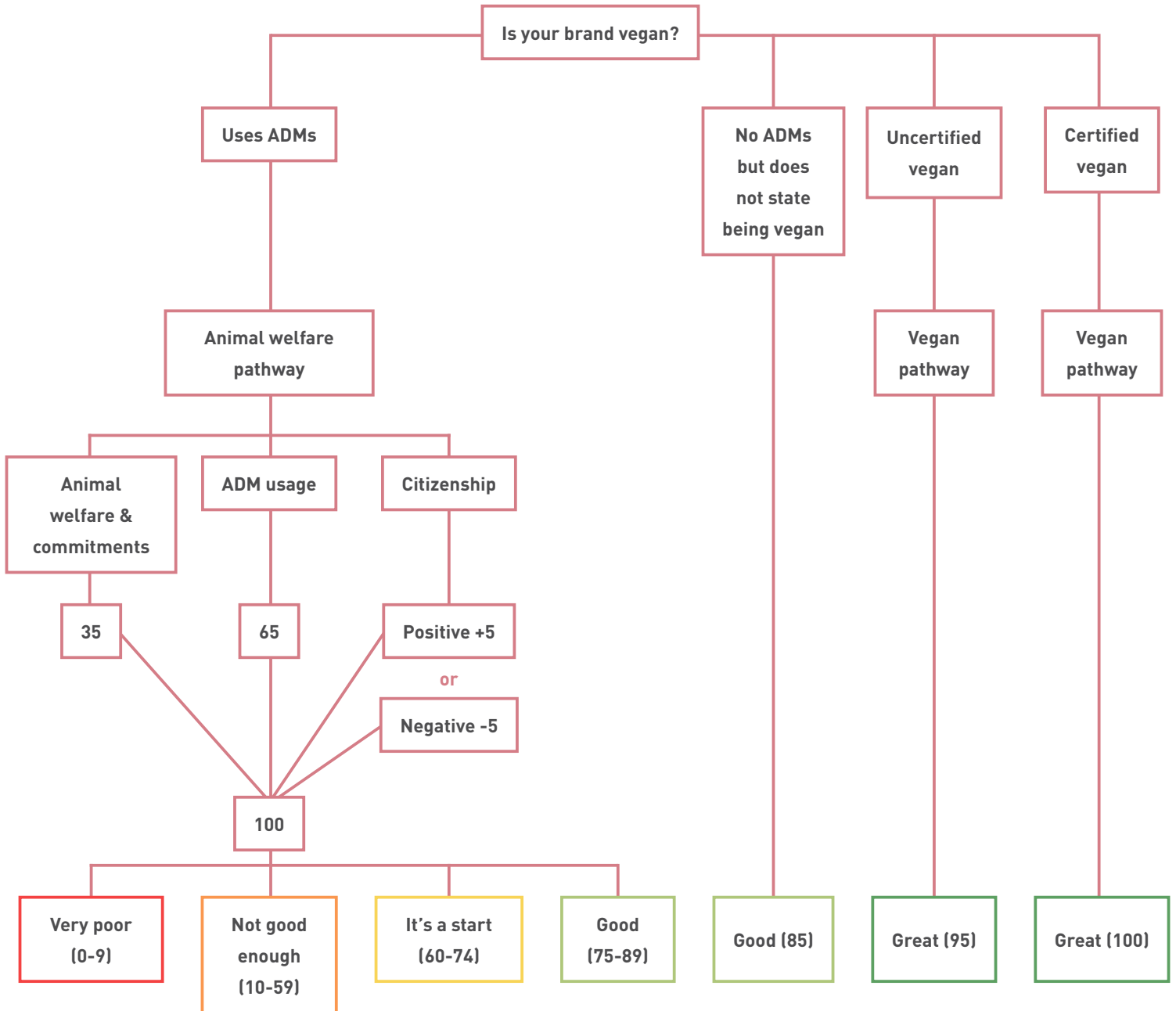
2023 Good On You methodology	Rationale for proposed change	2021 Good On You methodology
Assess brands on their disclosure of the use of animal-derived materials.	Transparency of animal welfare practices should be part of the due diligence by brands that source animal-derived materials. Reporting is a fundamental part of ensuring that animal welfare policies and any publicly communicated commitments by brands are being implemented.	Not assessed.
Assess brands on the number of animal-derived material types in brand supply chains. The more animal-derived material types are used by a brand, the lower their score should be.	The production of different animal-derived material types come with a host of species-specific animal welfare requirements and risks at the farm level. The more animal-derived material types being used by brands in their supply chains, the wider the range of animal welfare requirements and risks that must be mitigated and verified. This nexus of impacts makes it increasingly harder for brands to properly understand and manage such risks.	Not assessed.
Assess brands on their use of certified animal-derived materials, including a wider range of certifications to be recognised and scored in the system.	From an animal welfare perspective, the minimum requirement for brands that source animal-derived materials should be that these are certified to animal welfare standards. Certifications can provide traceability to the farm level where it is possible for brands to verify the conditions and treatment of animals and the animal welfare practices associated with their supply chains. Certifications can provide an important first step for brands to establish relationships at the farm level. They also facilitate the opportunities for brands to encourage better animal welfare practices associated directly with their supply chains.	Where the previous methodology only awarded points for brands that achieved 100% certified materials, the 2023 methodology aimed to award points in a more accurate way by considering the proportions of certified materials used.

Rating the impact on ‘animals’

In the Good On You ratings, the ‘animals’ methodology involves two different pathways. The first pathway is for brands that do not use any animal-derived materials whatsoever. In this section, brands may differ in score (i.e. 90, 95, 100) depending on whether they have stated they

are a vegan brand, and whether they have been certified as vegan. Nevertheless, all brands in this pathway automatically receive a Good On You rating of ‘Great’ for ‘animals’ and there are no further criteria on which these brands are assessed regarding animal welfare practices.

Figure 1: Good On You animals scoring overview



Other than a handful of brands that were included in the last report but have since been verified as being completely free from the use of animal-derived materials, our sample composition generally includes those fashion

brands that use one or more animal-derived materials. This enables us to assess brands’ performance in animal welfare. This brings us to the second pathway in the Good On You methodology and is relevant to all other brands.

Animal welfare pathway in the Good On You rating system

For brands using one or more animal-derived materials, the second pathway in the rating system assesses animal welfare practices across the following areas.

Table 3: Good On You animals scoring overview

Area of assessment	Criteria
Animal welfare and commitments	Does the brand have an animal welfare policy?
	Has the brand committed to avoid the use of materials derived from wild animals?
	Has the brand committed to the reduction or elimination of its use of animal-derived materials?
	Has the brand disclosed the amounts of each animal-derived material it uses?
	Has the brand committed to fully traceable or certified leather? * *Conditional on brands using leather
	Has the brand committed to fully certified non-mulesed wool? * *Conditional on brands using wool
Sub-total	35
Animal-derived materials usage	Which of the following 'conventional' animal-derived materials (leather, wool, cashmere, alpaca, mohair, down) does the brand use and are any of these certified to recycled material or animal welfare standards?
	Which of the following 'higher risk' animal-derived materials (fur, angora, any materials from wildlife or from farmed species where the wild species counterpart could become endangered, e.g. Bactrian camel, yak) does the brand use?
	How many animal-derived material categories ('material types') are being used in the brand's supply chains?
Sub-total	65
Total score for 'animals'	
(No citizenship applied – total score is the final score for 'animals')	100
Positive citizenship* *Bonus section where applicable to brand	Does the brand take part in identified initiatives that demonstrate animal welfare advocacy?
Final score 'animals'	
(Positive citizenship applied)	Total score + 5
Negative citizenship* *Bonus section where applicable to brand	Has the brand been involved in an animal-related scandal in the past 3 years?
Final score 'animals'	
(Negative citizenship applied)	Total score - 5

Animal welfare and commitments

The animal welfare and commitments section of the rating system contributes to 35% of brands' final 'animals' score. There are six criteria in this section, two of which are conditional on brands using leather and/or wool. It comprises a list of questions which consider whether a brand has disclosed:

- Their animal welfare policy;
- If they have committed to reduce or eliminate their use of animal-derived materials, including any progress reports towards publicly communicated targets for their materials;
- Their usage of animal-derived materials, including the total amounts of animal-derived materials used and the breakdown per material type; the amounts of each animal-derived material in proportion to the brand's total materials; the amounts of certified animal-derived materials and the breakdown per certification;
- If they have committed to fully traceable or certified leather (for brands that use leather) and/or committed to fully certified non-mulesed wool (for brands that use wool).

Within each criterion, there are a range of options which may reflect all or a combination of the following:

- i) the identified best practice;
- ii) not best practice but a practice which meets a high standard;
- iii) not best practice but a practice which meets a good standard;
- iv) not the best practice but a practice which reflects the industry average;
- v) a practice which is below industry average but still of notable value to animal welfare;
- vi) a practice which does not meet the industry average; an absence of practice; or some other practice that goes against animal welfare recommendations.

Starting with the best practice option receiving 100% of the points allocated to each criterion question, each option below best practice is allocated a proportionally lower percentage score than the maximum points available for it. While the levels of practice recognised and the number of options available may vary between criteria, the typical progression of the scoring allocation aligns with the scoring range corresponding to the Good On You categories: 'Great', 'Good', 'It's a Start', 'Not Good Enough', 'We Avoid / Very Poor'.



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Animal-derived materials usage

The animal-derived materials usage section considers the full range of animal-derived materials that brands may source. It is worth 65% of the final 'animals' score and is divided into three key areas of assessment.

Animal-derived material supply chains

The first section considers the number of animal-derived material types used in brand supply chains. Brands that have limited use to only one type of animal-derived material did not receive a penalty and obtained the maximum 10 points available in this section.

For every additional animal-derived material type that was used, brands were proportionally penalised. This occurred for two reasons. Firstly, to reflect the FOUR PAWS policy recommendation that brands should carefully consider the animal welfare risks associated with each type of animal-derived material and therefore limit the range of animal-derived material types used by brands. This is because the use of multiple material types involves many different species of animals, with each species bringing a host of animal welfare requirements and risks – much more than what brands are realistically capable of managing and mitigating directly.

The second reason was to address a scoring anomaly in the previous 'animals' methodology whereby brands that used significant volumes of one material could score significantly lower than brands that used small amounts of many animal-derived materials, which together may add up to a similar amount of material used by the first brand.

Scoring 'conventional' animal-derived materials

The second section considered the use of 'conventional' animal-derived materials such as leather, down, sheep wool and other fine wools including alpaca, cashmere, and mohair. For the use of such material types, points were awarded only for the proportions of certified materials used.

From the view of FOUR PAWS, sourcing virgin animal-derived materials certified to animal welfare standards should be the minimum requirement for any brand that used animal-derived materials. Therefore, for brands that sourced uncertified virgin animal-derived materials, the proportion of their uncertified materials were awarded zero points.

The proportions of certified materials and material type in relation to total animal-derived materials were based on information that was publicly reported by brands. Where such information was not publicly reported, a proportion was estimated based on the current products for a brand. Where current products did not provide sufficient data, we considered the publicly available data across brands with similar profiles.

The total score for the use of certified animal-derived materials out of 30 points was derived from the following steps.

Step 1

Firstly, the amount of each material type as a percentage of total animal-derived material usage was determined. The score out of 30 for this section was allocated according to the proportions that each material type represented. For example, if a brand used a combination of animal-derived materials comprised of 80% wool, 15% cashmere, and 5% leather, the score for wool would contribute 80% of the total points out of 30, cashmere would contribute 15%, and leather would contribute 5%.



Step 2

Separately, the weighted average was calculated per material type, whereby the percentage of preferred materials (i.e. materials certified to recycled material and animal welfare standards) were awarded points in proportion to the percentage that each material type, while the use of uncertified materials did not garner any points. This calculation was possible for brands that disclosed the:

- percentages of certified animal-derived material (per material type and the types of certifications used also reported by some brands); and
- the percentage of the material type in proportion to total animal-derived materials.

These two points of data were multiplied to obtain the weighted average per material type.

Step 3

The weighted averages per material type calculated in step 2 were then multiplied by the weighted value of the certifications used to obtain the weighted score per material type. The weighted values of the certifications were:

Vcert1 = 1 for certified GRS recycled animal-derived materials, otherwise 0

Vcert2 = 0.95 for certified non-GRS (RCS) recycled animal-derived materials, otherwise 0

Vcert3 = 0.85 for uncertified recycled animal-derived materials, otherwise 0

Vcert4 = 0.85 for certified virgin animal-derived materials to best available animal welfare standard, otherwise Vcert = 60, 40

Lower weighted values (Vcert = 60, 40) were assigned to animal welfare certifications that offered only partial supply chain traceability, e.g. only up to the processing stage, or where the scope of animal welfare requirements addressed was significantly less.

Step 4

To obtain the final score for the use of 'conventional' animal-derived materials, the weighted scores per material type obtained via steps 2-3 were added together.

Where insufficient information on animal-derived materials was reported by brands, but brands indicated their use of materials that were certified to recycled material or animal welfare standards, a percentage of points was automatically awarded to brands. This was done to ensure brands were awarded for the practice, and was deduced by considering one or more of the following:

- Wording in animal welfare policies in relation to the use of preferred or certified materials;
- Certified materials found in brands' current products;
- Materials information disclosed in sustainability / impact reports;
- The progress reported on sustainability targets (especially targets in relation to 'preferred' materials).

Therefore, brands that appeared to be using nominal amounts of certified animal-derived materials but did not report on the use of these were automatically awarded 30% of the maximum score, i.e. 9 out of the 30 points available. While we acknowledge this process was not perfect, we believed that it would draw on more accurate results than if we had not considered the usage rates of certified materials at all for brands that did not disclose this information themselves.

In future, it could be expected that the Good On You methodology would allocate a pre-determined percentage score based on whether 'some' or 'most' of the animal-derived material types that brands used were certified to recycled material or animal welfare standards. The pre-determined percentages would still be only a nominal amount, however, to encourage brands to disclose accurate information on animal-derived materials usage themselves.



Scoring 'higher risk' animal-derived materials

The third section considers the use of 'higher risk' animal-derived materials, including those which FOUR PAWS believes should not be used for fashion, especially when there are now many available animal-free alternatives that could be used in their place. 'Higher risk' animal-derived materials therefore included (but were not limited to) fur; angora wool; exotic skins such as crocodile, python; and decorative exotic feathers.

The use of these materials was deemed unacceptable by FOUR PAWS because the production of such materials

is associated with severe animal welfare deficits²⁶. The animal-derived materials considered here mainly come from wild species which have not been domesticated and are therefore inherently vulnerable to suffering in confinement or due to the impacts of trapping and hunting of animals in the wild including the impacts on dependent young or to local ecosystems and biodiversity^{27,28,29}. The intensive systems in place also do not consider the natural needs of the animals³⁰, and often cruel catching and trapping methods are used³¹. Brands that have never used such materials were therefore automatically awarded the maximum 25 points from this section, while brands that used such materials were not awarded any points.



Animal welfare advocacy

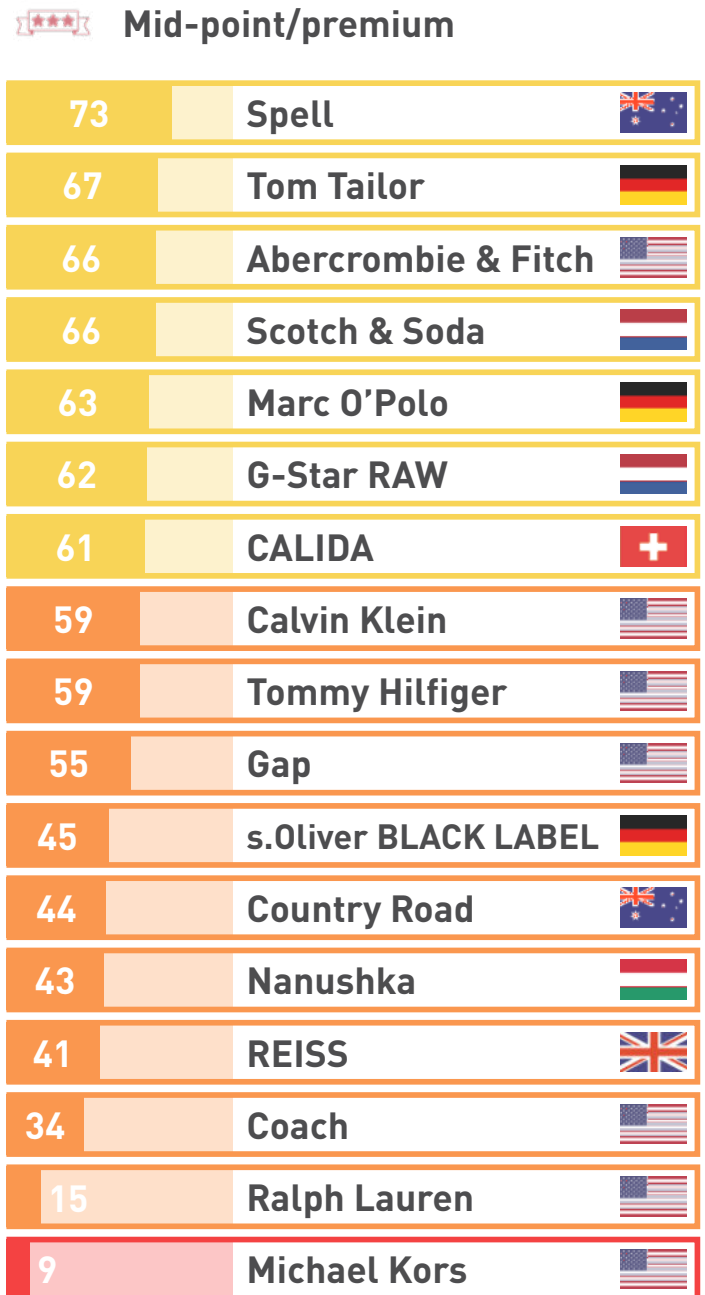
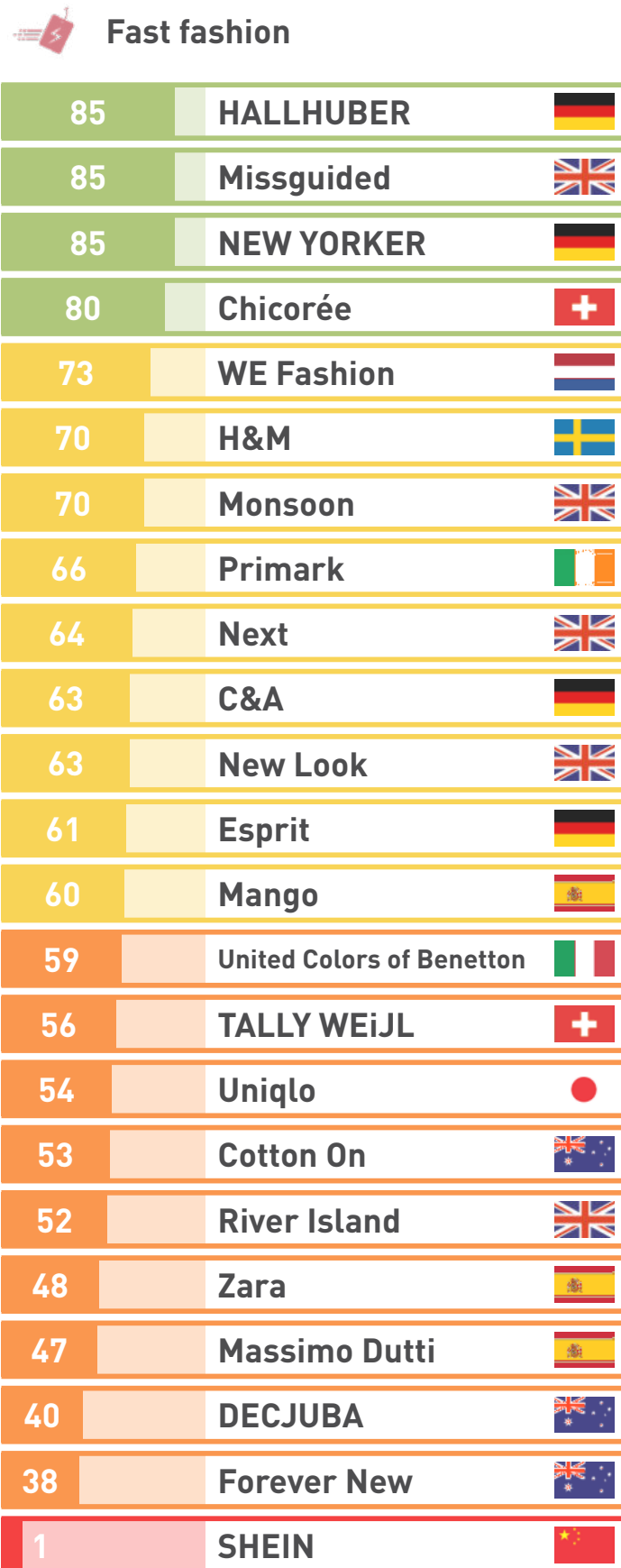
Where relevant to brands, there was an opportunity to be assessed for additional practices that were not captured in any other criteria in a bonus Citizenship section. Positive citizenship provides the opportunity to reward brands for identified good practices that demonstrate a brand's advocacy for animal welfare. Examples include brands that have signed up to the [Fur Free Retailer](#) programme, or those that have invested in the development of next-generation materials.

Similarly, the 'animals' methodology aims to prevent brands whose supply chains have been linked to animal cruelty from being overcompensated for their performance in animal welfare. As brands do not typically publish such information themselves, evidence is gathered from independent sources.

Where positive citizenship applied, the total 'animals' score for brands received up to an additional 5 points to their total score. In the latter case, the total 'animals' score was allocated up to a five-point reduction.

We aim to collaborate again with Good On You to review and update the 'animals' methodology in coming years to ensure continual improvement of the brand ratings and that it reflects the latest in best practices.













Results by Market Segment












Good on You ratings: ■ Great ■ Good ■ It's a start ■ Not good enough ■ Very poor

Results by Market Segment







Luxury

85	Stella McCartney	
71	Hugo Boss	
41	Moncler	
36	Burberry	
30	Chloé	
26	Gucci	
25	Off-White	
19	Dior	
14	Louis Vuitton	
6	Hermès	
4	Prada	
1	Max Mara	

Department store retailers

80	TJ Maxx	
64	Collectif mon Amour (Modissa)	
62	John Lewis	
60	Marks & Spencer	
59	Nordstrom	
55	Macy's	
48	Globus	
48	Manor	
28	Harrods	

Supermarket and chain retailers











85	KiK	
78	Takko	
65	Kmart Australia	
59	Tu (Sainsbury's)	
56	George (ASDA)	
52	F&F Clothing (Tesco)	












Good on You ratings: ■ Great ■ Good ■ It's a start ■ Not good enough ■ Very poor

Results by Market Segment









Outdoor

89	Patagonia	
85	Icebreaker	
73	Kathmandu	
70	Mammut	
70	The North Face	
69	Columbia	
62	Jack Wolfskin	
54	Canada Goose	
47	Superdry	
38	L.L. Bean	

Sustainability champions

95	NIKIN	
84	Another Tomorrow	
84	ARMEDANGELS	
81	NAGNATA	
76	Reformation	
70	Mara Hoffman	
66	Thought	
62	Eileen Fisher	
55	People Tree	

Sports

72	Puma	
64	O'Neill	
61	Decathlon	
48	Under Armour	
45	Reebok	
19	Adidas	
11	New Balance	
10	Nike	

Online and 'digital-first' retailers

67	Anna Field	
62	Atmos&Here (The Iconic)	
60	PKZ	
57	ASOS	
51	About You (Otto Group)	
48	Boohoo	

Good on You ratings:

 Great

 Good

 It's a start

 Not good enough

 Very poor

Brand results overview

In 2023, 50% of the brands selected were rated 'It's a Start' or better, and just 15% rated 'Good' or 'Great'.

The most frequented rating for the brands selected was 'Not Good Enough', represented by 45% of brands. Below, we outline the key similarities and differences we found for the selected brands that were rated in each of the categories.

Rated 'Very Poor' by Good On You

Selected brands that were rated Very Poor received an 'animals' score between 0-9 by Good On You. Brands in this category tended to use a high number of animal-derived material types in their supply chains. On average, the brands that were rated Very Poor used five of six 'conventional' material types, most of which were not certified to recycled material or animal welfare standards. Additionally, all the brands rated as 'Very Poor' used one or more 'higher risk' animal-derived materials such as fur, angora wool, exotic skins including crocodile or python, exotic decorative feathers, horn, and camel or yak hairs. Meanwhile, none of the selected brands in this category disclosed that they were committed to end the use of such materials in the future, nor did they have animal welfare policies. Most of the brands also demonstrated very little transparency about the animal-derived materials they used.

Rated 'Not Good Enough' by Good On You

Selected brands that were rated 'Not Good Enough' received an 'animals' score between 10-59 by Good On You. Brands in this category tended to use a high number of animal-derived material types in their supply chains, albeit slightly less than the brands that were rated 'Very Poor'. On average, the brands that were rated 'Not Good Enough' used four of six 'conventional' material types. While most of these materials were not certified to recycled material or animal welfare standards, 84% of the brands rated 'Not Good Enough' already sourced small amounts of certified animal-derived materials. Less than a third of the selected brands that were rated in this

category were found to have sourced more than 10% of their total animal-derived materials to certified standards.

However, 29% of the brands that were rated 'Not Good Enough' used one or more 'higher risk' animal-derived materials such as exotic skins including fur, crocodile, python or kangaroo, exotic decorative feathers, and camel or yak hairs. None of the selected brands that were rated in this category used angora wool.

The key difference between the brands that were rated 'Not Good Enough' and 'Very Poor' is that there was generally a higher level of transparency by the brands that were rated 'Not Good Enough'. 49% of the brands that were rated 'Not Good Enough' disclosed the animal-derived material types they used, and 22% reported on their usage of one or more animal-derived material types.

Rated 'It's a Start' by Good On You

Selected brands that were rated 'It's a Start' received an 'animals' score between 60-74 by Good On You. Brands in this category tended to use a lower number of animal-derived material types in their supply chains when compared to the lower rated brands. On average, the brands that were rated 'It's a Start' used three of six 'conventional' material types. For the selected brands that scored at the higher end of 'It's a Start', the use of 'conventional' material types was accompanied by higher levels of transparency. All the selected brands that scored at the higher end of the category also published timebound commitments to fully certified non-mulesed wool, and demonstrated some kind of positive citizenship, e.g. brands had signed up to the [Fur Free Retailer](#) programme.

The key differences between the selected brands that were rated 'It's a Start' and 'Not Good Enough' was that none of the brands rated 'It's a Start' used 'higher risk' animal-derived materials. The brands rated 'It's a Start' also used relatively higher proportions of certified animal-derived materials. 89% of the selected brands that were rated 'It's a Start' already sourced a portion of certified animal-derived materials, with 29% of the brands in this category sourcing more than 10% of their total animal-derived materials to certified standards.

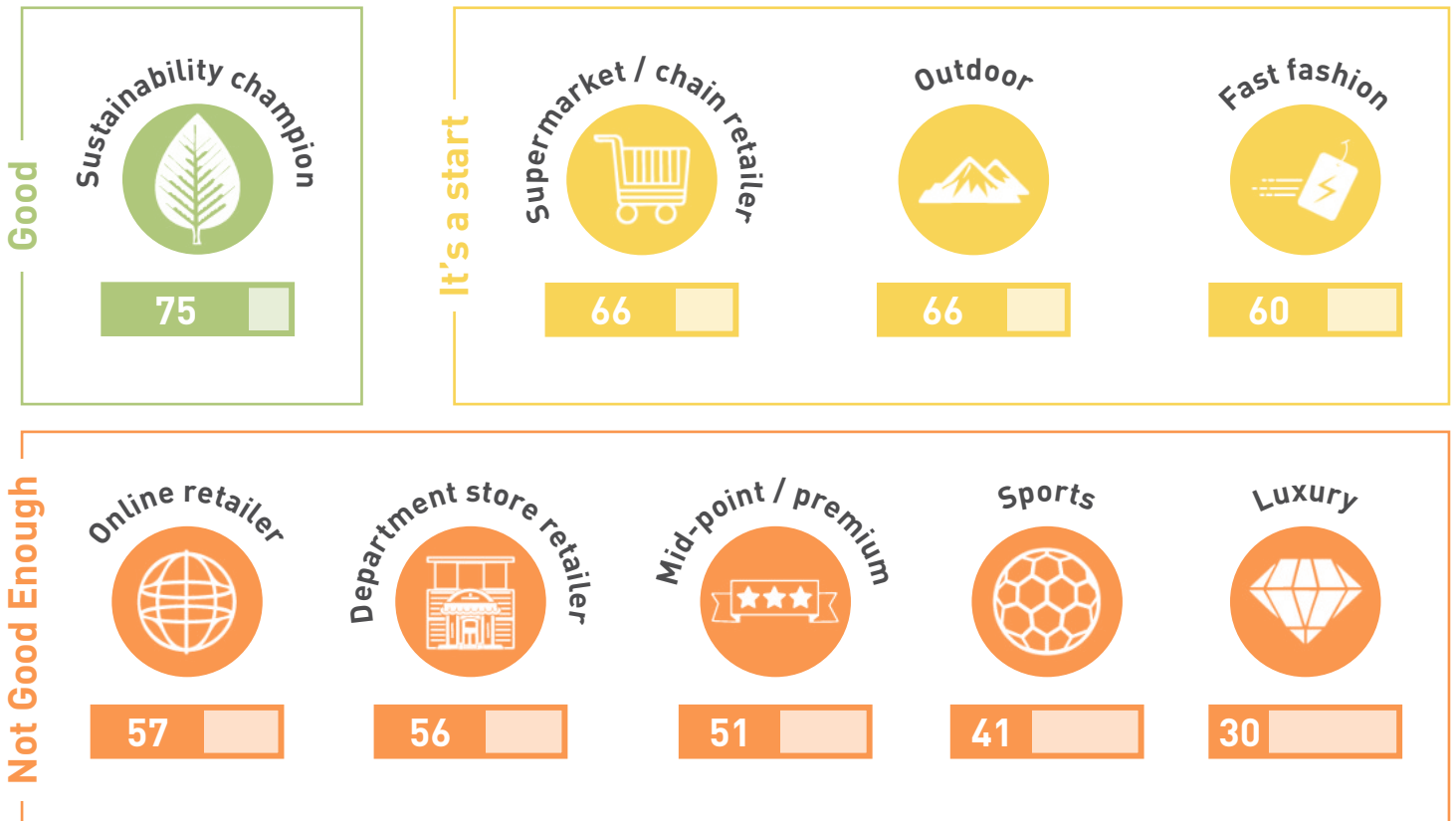
Almost half of the selected brands that were rated 'It's a Start' sourced at least one fully certified animal-derived material type, namely down fully certified to the Responsible Down Standard. Higher levels of transparency overall were also achieved by the selected brands that were rated 'It's a Start'.

Rated 'Good' by Good On You

Selected brands that were rated 'Good' received an 'animals' score between 75-89 by Good On You. Brands in this category tended to limit the types of animal-derived materials they used in their supply chains. On average, the brands that were rated 'Good' used two 'conventional' material types. All the selected brands that used animal-derived materials had animal welfare policies and already achieved considerable progress in sourcing animal-derived materials certified to recycled material or animal welfare standards, if not already fully achieved.

Most of the selected brands that were rated Good also demonstrated some form of positive citizenship. For example, numerous brands had signed up to the [Fur Free Retailer](#) programme, campaigned on an animal welfare issue, were invested in the development of next-generation materials, disclosed that they engaged directly with their producers, or disclosed animal welfare requirements that went beyond product certification.

Breakdown per market segment (showing average brand score and Good On You rating per segment)



The brands selected to represent the sustainability champion market segment were the highest performers across the market segments, with an average score of 75. These brands used an average of two 'conventional' material types in their supply chains. Most of the brands that used animal-derived materials and belonged to this market segment also had animal welfare policies.

The most frequented materials by the brands from this segment was wool and cashmere. Half of the brands that used wool sourced fully certified non-mulesed wool to the Responsible Wool Standard or fully certified recycled wool to the Global Recycled Standard. Most of the brands that used wool from this segment also disclosed that they were committed to sourcing fully certified non-mulesed wool by a set date.

All the selected brands from this segment that used cashmere used recycled rather than virgin cashmere, with half of the brands sourcing fully certified recycled cashmere to the Global Recycled Standard.

Most sustainability champion brands also demonstrated some form of positive citizenship. For example, numerous brands had signed up to the [Fur Free Retailer](#) programme, campaigned on an animal welfare issue, or taken part in initiatives to improve animal welfare standards in textile supply chains.



Looking at the other end of the spectrum, the poor performance of the brands selected from the luxury and sports market segments were mainly due to:

- The use of wild animal materials such as crocodile, python, or kangaroo skins;
- Lack of an animal welfare policy; and
- The use of multiple 'conventional' animal-derived materials, most of which were not certified to recycled or animal welfare standards.

Positively, there has been some notable progress by the selected luxury brands since their inclusion in our 2021 report. Four out of the five luxury brands selected that did not have animal welfare policies in 2021 now had animal welfare policies in place. 75% of the selected luxury brands used at least some 'conventional' material types which were certified to recycled material or animal welfare standards. Equally, 75% of the selected luxury brands demonstrated some form of positive citizenship, e.g. numerous brands had signed up to the [Fur Free Retailer](#) programme, taken part in initiatives to improve animal welfare standards in textile supply chains, or engaged directly with producers to improve animal welfare standards in brands' own supply chains. Additionally, 25% of the selected luxury brands also disclosed timebound commitments to fully certified non-mulesed wool, and to end the use of wild animal materials by a set date.

Across most of the market segments – fast fashion, luxury, mid-point / premium, sports, and department store retailers – the average performance of the selected brands was a rating of 'Not Good Enough'. Nevertheless, most market segments had 'market leaders' that scored well above the average in their respective segments.

Selected brands that outperformed their market segment in 2023



Sustainability champions

Average score: **75**

95	NIKIN	
84	Another Tomorrow	
84	ARMEDANGELS	
81	NAGNATA	
76	Reformation	



Outdoor

Average score: **66**

89	Patagonia	
85	Icebreaker	



Supermarket / chain retailer

Average score: **66**

85	KiK	
78	Takko	



Fast fashion

Average score: **60**

85	HALLHUBER	
85	Missguided	
85	NEW YORKER	
80	Chicorée	



Department store retailer

Average score: **56**

80	TJ Maxx	
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Mid-point / premium

Average score: **51**

73	Spell	
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Sports

Average score: **41**

72	Puma	
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Luxury

Average score: **30**

85	Stella McCartney	
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For this report, we have included a recognition initiative called the 'FOUR PAWS PAWSome Fashion Awards' to highlight brands for their notable progress in animal welfare.

FOUR PAWS PAWSome Fashion Awards

Under each awards category, we have recognised the following from the selected brands:



Top Scoring PAWSome Fashion Brand: NIKIN

Since NIKIN's inclusion in our 2021 fashion report, their 'animals' rating has moved from 'Good' to 'Great' during this time. NIKIN is a sustainability champion that produces vegan fashion products and they have clearly communicated this intention.



Most Committed PAWSome Fashion Brand: G-Star RAW

G-Star RAW was the only brand that disclosed their commitment to convert all virgin animal-derived materials to certified recycled animal-derived materials by a set date. For this commitment, G-Star disclosed that they aim to limit their usage of animal-derived material to just one type, i.e. recycled wool only, and increase their use of other preferred lower impact materials. This genuine commitment to reducing their reliance on virgin animal-derived materials will not only significantly lower their carbon emissions but can be expected to enable the brand to effectively mitigate most animal welfare risks in their supply chains.



Most Improved PAWSome Fashion Brand: Missguided

Since their inclusion in our 2021 fashion report, Missguided has moved from 'It's a Start' to 'Good' for 'animals' by Good On You. While they previously used non-mulesed wool, down, and leather, they have since avoided the use of any animal-derived materials.



Animal Welfare Pioneer PAWSome Fashion Brand: Another Tomorrow

Another Tomorrow is championing progress for animals in fashion like no other brand. They set up a customer-driven petition to campaign against mulesing and is working towards a slaughter-free wool supply chain.



Most Transparent PAWSome Fashion Brand: Stella McCartney

Stella McCartney leads the way in transparency. The brand disclosed each of the materials they used, clearly communicated about each of the materials they prohibited, reported on the usage of each material in volume as well as by environmental impact and outlined detailed requirements for animal welfare that went beyond product certification.



Country results: United States of America

While the US was surpassed by China as the world’s largest consumer of fashion in 2019³², it was still the world leader in 2022 based on apparel market revenue³³. For the selected brands that were rated in the animal welfare pathway for the use of one or more animal-derived materials, the American brand Patagonia led the way with a score of 89. The key factors disclosed, and which contributed to Patagonia’s top score were:



- Having a meaningful animal welfare policy that outlined requirements for each of the animal-derived materials they used including certifications to recycled or animal welfare standards, and a position against the use of wild animals regardless of the protection status of the species;
- Reporting on their usage of total animal-derived materials;
- Their initiative to help improve animal welfare standards in textile certification schemes; and
- Their commitment to fully traceable and certified leather by a set date.

Brands selected from the United States made up 23% of our total sample of brands in 2023, and wool, leather, down and cashmere were the most frequently used animal-derived materials. **Overall, the American brands selected performed above the average for selected brands across our total sample.** The brands that used animal-derived materials and were rated ‘Good’ came from the outdoor and sustainability champion market segments.

Results for US brands

Good		Not good enough		It’s a start		Very poor	
Patagonia	89	Tommy Hilfiger	59	The North Face	70	Michael Kors	9
Icebreaker	85	Nordstrom	59	Mara Hoffman	70		
Another Tomorrow	84	Calvin Klein	59	Columbia	69		
TJ Maxx*	80	Macy’s	55	Abercrombie			
Reformation	76	Gap	55	& Fitch	66		
		Under Armour	48	Eileen Fisher	62		
		Reebok	45				
		L.L Bean	38				
		Coach	34				
		Ralph Lauren	15				
		New Balance	11				
		Nike	10				

*TJ Maxx was not rated via the animal welfare pathway.

For the selected American brands, we found:

82% had animal welfare policies in place, compared to 72% of brands in our total sample, and up from 64% for the same brands rated in 2021.

22% were rated 'Good', compared to 14% of brands in our total sample.

43% were rated 'It's a Start' or higher for 'animals' by Good On You, compared to 50% of brands in our total sample.

Of the selected brands that had animal welfare policies in 2023 but did not when they were rated in 2021, these were Abercrombie & Fitch, Macy's, New Balance, and Reformation.

Positively, 52% of the selected American brands that used wool sourced wool certified to recycled material or animal welfare standards, and 19% of the brands that used wool already sourced fully certified non-mulesed wool. Additionally, 38% of the selected American brands that used wool disclosed timebound commitments to source fully certified non-mulesed wool.

Another notable area of progress was the commitment to end the use of kangaroo leather, i.e. a 'higher risk' animal-derived material type, by sportswear giants Nike and New Balance.

Nonetheless, there were still some key areas where American brands underperformed. Almost a quarter (23%) of the selected American brands still used 'higher risk' animal-derived materials such as angora wool, exotic decorative feathers and exotic skins including crocodile and python, and did not disclose timebound commitments in place to end their use.

Moreover, despite the many animal welfare concerns for bovine leather at the farm level, just 6% of the selected American brands disclosed their aim to achieve full traceability to farm (out of the 77% of American brands selected that used leather).





Country results: United Kingdom

The UK was the fifth largest fashion market based on apparel market revenue in 2022, trailing the US, China, India and Japan³³. The UK is also the third-largest apparel and footwear retail market in the world³⁴. In 2023, Missguided and Stella McCartney were the only UK brands that were rated 'Good' for 'animals' by Good On You.

Positively, no UK brands selected were rated 'Very Poor'.

Results for UK brands

Good		It's a start		Not good enough	
Stella McCartney	85	Monsoon	70	Tu (Sainsbury's)	59
Missguided	85	Thought	66	ASOS	57
		Next	64	George (ASDA)	56
		New Look	63	People Tree*	55
		John Lewis	62	River Island	52
		Marks & Spencer	60	F&F Clothing (Tesco)	52
				Boohoo	48
				Superdry	47
				REISS	41
				Burberry	36
				Harrods	28



*People Tree has since gone into administration. Missguided was not rated via the animal welfare pathway in 2023 (but were included due to being rated in 2021 based on their use of wool, leather, and down).

Brands selected from the UK made up 20% of our total report sample in 2023, and wool and leather were the most frequently used animal-derived materials. Overall, the British brands selected performed on par when compared to the average performance of the selected brands in our total sample. For the selected British brands, we found:

45% were rated 'It's a Start' or higher for 'animals' by Good On You, compared to 50% of brands in our total sample.

10% were rated 'Good', compared to 14% of brands in our total sample.

75% had animal welfare policies in place, compared to 72% of brands in our total sample, and up from 65% for the same brands rated in 2021.

Of the selected brands that had animal welfare policies in 2023 but did not when they were rated in 2021, these were Boohoo, John Lewis, and Stella McCartney.

While 45% of the selected British brands that used wool disclosed timebound commitments to source fully certified non-mulesed wool, there is still much to improve by the selected British brands.

Just 32% of the British brands selected that used wool sourced wool certified to recycled material or animal welfare standards, and only 5% of the brands that used wool already sourced fully certified non-mulesed wool.

Additionally, 10% of the British brands selected still used 'higher risk' animal-derived materials such as exotic decorative feathers and yak hair, and did not disclose timebound commitments in place to end their use.

Moreover, despite the many animal welfare concerns for bovine leather at the farm level, Burberry was the only selected British brand (out of the 80% of British brands selected that used leather) that disclosed their aim to achieve full traceability to farm.

Country results: Germany

Germany is the fourth-largest apparel and footwear retail market in the world, and is Europe’s largest consumer of fashion, accounting for almost a quarter of Europe’s extra-EU import of clothing by value^{34,35}

Results for German brands

Good		It’s a start		Not good enough	
NEW YORKER	85	Puma	72	About You (Otto Group)	51
KiK	85	Hugo Boss	71	s.Oliver BLACK LABEL	46
HALLHUBER	85	Tom Tailor	67	Adidas	19
ARMEDANGELS	84	Anna Field (Zalando)	67		
Takko	78	Marc O’Polo	63		
		C&A	63		
		Jack Wolfskin	62		
		Esprit	61		



*HALLHUBER has since gone into administration. KiK and NEW YORKER were not rated via the animal welfare pathway in 2023. These brands did not appear to use animal-derived materials at the time of rating but did not disclose whether their products were completely animal-free.

Brands selected from Germany made up 16% of our total sample of brands selected in 2023, and wool, leather and down were the most frequently used animal-derived materials. Overall, the German brands selected performed well above the average for the brands selected across our total sample. For the German brands selected, we found:

81% were rated ‘It’s a Start’ or higher for ‘animals’ by Good On You, compared to 50% of brands in our total sample.

31% were rated ‘Good’, compared to 14% of brands in our total sample.

100% had animal welfare policies in place, compared to 72% of brands in our total sample, and 82% for the same brands rated in 2021.

Of the selected brands that had animal welfare policies in 2023 but did not when they were rated in 2021, these were Jack Wolfskin and Takko.

Positively, 62% of the German brands selected that used wool sourced wool certified to recycled material or animal welfare standards, and 25% of brands that used wool already sourced fully certified non-mulesed wool. Additionally, 85% of the German brands selected that used wool disclosed timebound commitments to source fully certified non-mulesed wool.

Nonetheless, there were still some key areas where the selected German brands underperformed. Despite the many animal welfare concerns for bovine leather at the farm level, none of the German brands selected disclosed aims to achieve full traceability to farm (out of the 75% of the selected German brands that used leather).

Moreover, Adidas was the lowest scoring German brand selected due to its use of kangaroo leather, and has yet to disclose a commitment to end its use.

Fashion's progress on animal welfare: the 'good'

Animal welfare is increasingly a priority for fashion brands alongside environmental sustainability. This was most clearly evidenced by 72 of the 93 (77%) brands selected in 2023 that used animal-derived materials having animal welfare policies, **an increase of 12% when comparing the same selection of brands when they were rated in 2021.**

Positively, **25% of the brands selected in 2023 disclosed a commitment to achieving animal welfare standards consistent with the Five Domains of animal welfare.**

We also noted that animal welfare policies were more comprehensive across the board for the selected brands since we last analysed these in 2021. Policies more frequently disclosed brands' goals and vision for what the policy aimed to achieve overall for animals and animal welfare, and basic governance information. For example, information regarding positions or departments that were responsible for implementing and reporting against the policy was disclosed, and the frequency with which the policy was to be reviewed. Policies also more frequently addressed animal welfare and/or sourcing requirements per animal-derived material type, in addition to the animal-derived material types that brands prohibited. Policies more frequently addressed certification requirements for the animal-derived materials they

sourced. Some policies even disclosed animal-derived material usage per material type, either in addition to company sustainability/impact reports or in lieu of such reports.

Additionally, **over half (54%) of the brands selected demonstrated some form of animal welfare advocacy.** This was most frequently demonstrated by brands that were signed to the [Fur Free Retailer](#) programme, whereby 47% of brands were committed to this initiative.

Importantly, the use of animal-derived materials is increasingly a fixture of brand transparency. In our latest review, we found that half (50%) of the selected brands reported on their usage of at least some animal-derived materials. The use of certified wool and down were the most frequently disclosed animal-derived material types. Of the 93 selected brands that were found to use wool, 43 brands (46%) disclosed the use of certified wool. Similarly, of the 62 selected brands that were found to use down, 34 brands (55%) disclosed the use of certified down.



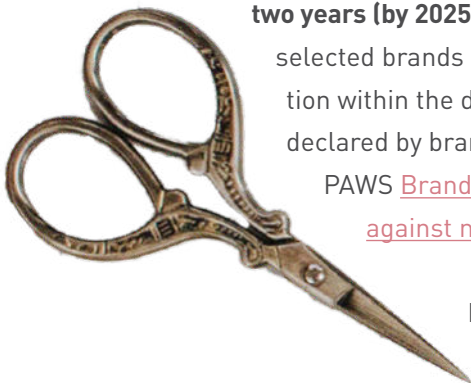
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Moreover, of the 43 selected brands that were found to use certified wool, 31 (72%) reported on the amounts of certified wool. Similarly, of the 34 selected brands that were found to use certified down, 21 (62%) reported on the amounts of certified down. This suggested that the uptake of animal welfare certifications by the selected brands facilitated transparency around the usage of animal-derived materials.

When it came to the use of wool – the most sourced animal-derived material type – we found that most of the selected brands (81%) were committed to the exclusive use of non-mulesed wool. Mulesing is a cruel mutilation practice endured by millions of lambs each year in the Australian wool industry. It is carried out as a cheap and fast way to prevent an issue called flystrike³⁶. However, just as the issue of mulesing was started as a man-made problem to maximise sheep's yield of wool, it could also be solved through more ethical and sustainable breeding practices³⁷.

Positively, almost a quarter (24%) of the selected brands disclosed that they expected to transition to fully certified non-mulesed wool within the next two years (by 2025), while 14% of the selected brands expected to transition within the decade (by 2033), as declared by brands via the FOUR PAWS [Brand Letter of Intent against mulesing](#) initiative.



Furthermore, for an increasing number of the

selected brands, we noted that the choice of animal-derived material types and the sourcing requirements for these were communicated as part of companies' approach to underlying sustainability principles and goals. Notable examples of the selected brands doing so included Abercrombie & Fitch³⁸, Chloé³⁹, H&M⁴⁰, Jack Wolfskin⁴¹, Mara Hoffman⁴², Nagnata⁴³, Nordstrom⁴⁴, Patagonia⁴⁵, Puma⁴⁶, Reformation⁴⁷, and Stella McCartney⁴⁸, all of whom communicated their consideration of animal-derived materials or animal welfare requirements in relation to lowering brands' environmental footprints or brands' circular fashion objectives.

We also noted that brands, in demonstrating greater transparency of their supply chain impacts, increasingly recognised through their own reporting the high carbon intensity and other adverse environmental impacts of animal-derived materials. Stella McCartney, for example, disclosed that 'conventional' wool, even when certified to standards that included environmental requirements, had the highest valued environmental intensity of any of their materials⁴⁹. Chloé, for example, disclosed that over 54% of their emissions were generated by raw materials, with leather contributing 48% of that total⁵⁰. Similarly, Spell disclosed that 45% of their emissions were generated by raw materials, with leather comprising 1% of their total materials but responsible for 11% of their total emissions⁵¹. Meanwhile, Reformation disclosed that while cashmere comprised just 1% of their total materials, it was responsible for almost half of the brand's total carbon footprint⁴⁷.



Another notable area of progress included the handful among the selected fashion brands (5%) that disclosed commitments to achieve full traceability of leather in their supply chains by a set date. These brands were: Burberry, United Colors of Benetton, Reformation, Kmart Australia, and Spell.

Fashion's progress on animal welfare: the 'bad'



Despite the progress that has been made in fashion over the last two years, there are areas where industry progress is still lacking.

Continued use of 'higher risk' materials

Despite the array of independent reports, investigations, and scientific findings regarding the many risks associated with use of materials deemed unacceptable by FOUR PAWS – such as severe animal welfare deficits, risks to biodiversity and wild populations, risks to public health as well as those associated with the illegal wildlife trade^{28,52, 53, 54, 55, 56, 57, 58} – 18% of brands were found to be using materials derived from wild animals such as crocodile, python, exotic decorative feathers, and from farmed animals with wild species counterparts such as camel and yak. Moreover, almost half (8%) of brands which were found to be using 'higher risk' materials had no commitments in place to stop using them.

Lack of action on bovine leather

FOUR PAWS is concerned about the poor welfare often experienced by cattle due to issues including:

- Intensification of farming, which is of major concern to cattle welfare as it relies on routine mutilations such as dehorning and castration which are often performed without adequate pain relief or anaesthesia^{59, 60, 61}.
- The industry lacks appropriate social systems, with animals kept in isolation (beef calves) after being prematurely removed from their mothers (dairy calves, but also beef), tethered, kept in overly crowded shelters, not having access to an outdoor run / pasture, and poor relationships with humans due to little or no positive human-animal interactions^{62, 63, 64, 65, 66}.
- The system lacks appropriate feed and sufficient water access, appropriate resting areas, and appropriate flooring^{67,68}.



Despite the major animal welfare concerns for cattle, and the well-reported environmental and social risks associated with bovine leather supply chains^{69, 70, 71, 72}, we found that most brands are yet to disclose commitments to eliminate the use of bovine leather.



While an overwhelming 83% of brands used bovine leather, very few of these brands were committed to minimising the animal welfare impacts of the leather in their supply chains.

4% of the brands selected used leather that was certified to either recycled or animal welfare standards. While the selected brands often had policies requiring leather to come from food production, only 2% of brands required leather to be certified to animal welfare standards in beef and dairy production.

2% of the brands selected disclosed their commitments to source fully certified leather against beef, dairy or organic standards with better-defined minimum requirements (although these do not rule out all cruel practices), e.g. Beter Leven Dairy/Beef, Animal Welfare Approved by AGW, Pasture For Life, Regenerative Organic Certified – Dairy Gold, NZ SPCA Animal Welfare Certified Dairy Cattle, EU Organic Certification, and USDA Organic.

2% of brands selected disclosed that they were part of the Textile Exchange Responsible Leather Round Table, a multi-stakeholder initiative aimed at improving animal welfare⁷³.

2% of brands selected disclosed that they were engaged with the Textile Exchange Leather Impact Accelerator, a set of tools for brands aimed at improving the baseline standards for animal, social and environmental welfare in leather supply chains⁷⁴.

Additionally, the inherent traceability challenges in bovine leather supply chains put the use of leather at odds with the transparency goals of most brands. Cattle move between multiple farms and ranches before they eventually end up at the slaughterhouse, with no tracking of the movement of neither the individual animals nor their raw hides⁷⁵. Visibility of leather production beyond the farm is also highly problematic, as skins are removed at slaughterhouses which are generally not set up for the traceability requirements of textile production⁷⁶.



While animal welfare frameworks for food can be important for benchmarking the production practices to a level of global competitiveness, there is a lack of consistency and transparency in the way certain frameworks are developed, communicated, and implemented. Therefore, while brands can utilise food certifications, they will need to carefully choose amongst high quality certification options only and will then need to navigate the highly challenging issues of leather supply chains. For many brands, this is unlikely to be a feasible option.

At the same time, there are currently no animal welfare certifications which provide assurances at each step of the leather production process from the farm to the final leather product. While the Leather Impact Accelerator (LIA) by Textile Exchange may eventually prove to have value with regards to both animal welfare and traceability in leather supply chains, we have yet to see whether this initiative will have a significant positive impact for the animals involved in leather production.

Moreover, we identified new areas where significant industry progress was needed.



Lack of commitments to reduction or elimination

We noted an increasing number of the selected brands had highlighted in their animal welfare policies an openness to exploring the use of next-generation materials, and **15% of the brands selected were known to be integrating next-generation materials into their products** through partnerships, in-house innovation, investment, and advisory services⁷⁷. Of the selected brands, these were: Adidas, Gucci, Hermès, H&M, Hugo Boss, Jack Wolfskin, Louis Vuitton, Marc O'Polo, Nike, PVH (Tommy Hilfiger, Calvin Klein), Ralph Lauren, Reformation, Richemont (Chloé), Stella McCartney, and The North Face. However, the selected brands are yet to disclose tangible reduction commitments. While many exciting next-generation alternatives have not yet overcome barriers to scaling and adoption, the transition to fully certified recycled animal-derived materials is a possible bridging step for brands in the meantime^{2,19,78}. Just one brand, G-Star RAW, disclosed their aim to transition to fully recycled materials for all animal-derived material types used by a set date⁷⁹.

Lack of brand investment into next-generation materials

Of the brands selected, 4% were found to currently offer products made from next-generation materials or had disclosed their investment in the development of next-generation materials. These brands were: Gucci, Michael Kors, Louis Vuitton, and Stella McCartney.

Lack of animal welfare practices beyond product certification

Of the 30% of the selected brands that were found to have used one or more animal-derived material types certified to animal welfare standards, **less than half (11%) disclosed that they advocated for animal welfare improvements within certification standards or directly in their supply chains**, e.g. long-term purchasing contracts with identified farms for the purposes of funding improved animal welfare, capacity building programmes for producers on animal welfare standards and practices. These brands were: Another Tomorrow, Burberry, CALIDA, Chloé, George, H&M, Hugo Boss, Icebreaker, Kathmandu, Patagonia, Stella McCartney, and Uniqlo.



Fashion's progress on animal welfare: areas for improvement

Meaningful animal welfare policies

While more of the selected brands that were rated in 2021 and used animal-derived materials had animal welfare policies, and these were generally also more comprehensive than before, we found that there were still further improvements to be made when it came to the development of meaningful animal welfare policies – i.e. policies which outlined actionable information and were transparent in their expectations, requirements, and processes. A fundamental area that continued to not be addressed by many policies from the selected brands is the continued reference to the outdated Five Freedoms.

Overall, current policies from selected brands failed to adequately demonstrate how better animal welfare outcomes outlined in the policies would be successfully implemented or achieved. In many cases, the use of animal welfare certifications was either considered a preference rather than a requirement, or not mentioned at all.

Moreover, while disclosing commitments to fully certified animal-derived materials is a good start, the ability to achieve animal welfare standards consistent with the Five Domains requires supply chain practices that go beyond product certification. These requirements were demonstrated by only a handful of the selected brands such as Another Tomorrow^{80,81}, Stella McCartney⁸², and Patagonia⁸³.



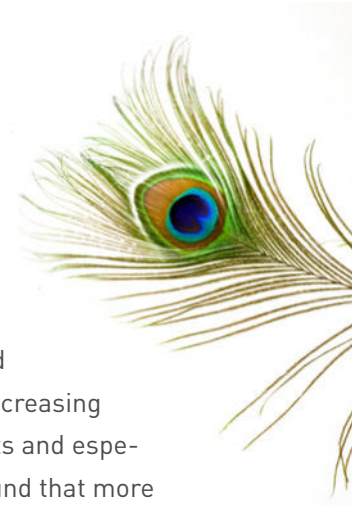
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Animal-derived materials from wildlife

Despite the inextricable links between wildlife, human welfare and environmental protection, and the increasing emphasis by brands on these aspects and especially the risks to biodiversity, we found that more than half **(51%) of brands did not address the use of wild animal materials at all**. Meanwhile, 13% of brands that addressed the use of materials from wild animals only did so to the extent regarding endangered or vulnerable species, even though the risks posed from the use of wildlife are not limited to protected species. For example, fur farms often house species such as American mink and raccoon dogs, which are considered highly invasive in many parts of the world and pose significant biodiversity risks to habitats^{27,52,84}.

Furthermore, wildlife farming and the processing of materials derived from wildlife are associated with negative environmental effects and a disastrous climate impact^{54,55}. The commercial exploitation and trade of wild animals is also associated with incalculable risks to public health. Wild animals – both in their natural habitats and in captivity – play an important role in the development of emerging zoonotic diseases^{56, 57, 58,84,85}.

Outbreaks of human, avian and swine influenza viruses have been identified in species farmed for fur as an example, indicating that these farms can be highly permissive 'mixing vessels' for the reassortment of circulating human and avian influenza viruses^{86,87}. Recent developments within the last year included an outbreak of highly pathogenic avian influenza (HPAI) in farmed minks in Spain, which led to an uncommon virus mutation with potential public health implications⁸⁸, and avian influenza infections on mink and fox farms in Finland, which led the Finnish health authority to order the culling of 120,000 animals⁸⁹.



Timebound commitments to fully certified non-mulesed wool

By sourcing non-mulesed wool that has been certified to animal welfare standards, brands can ensure the traceability of the non-mulesed wool and address a range of other animal welfare issues that routinely occur in its production. However, **over half (52%) of brands that were found to use wool had not yet made timebound commitments to fully certified non-mulesed wool**, even though 33% of these brands had policy requirements in place for the exclusive sourcing of non-mulesed wool.

However, it has become more important than ever that brands disclose their timebound commitments to fully certified non-mulesed wool. Progress to phase out the cruel and unnecessary practice of mulesing in the Australian wool industry has been painfully slow⁹⁰. At the same time, an increasing awareness amongst consumers has led to an increased demand by brands for non-mulesed wool^{91,92}. In less than three years since FOUR PAWS developed its [Brands Against Mulesing](#) list, the numbers of brands with anti-mulesing policies tripled⁹³. However, the Australian wool industry has outlined that an even stronger market signal from fashion brands for the demand in certified non-mulesed wool was needed, based not only on publicly communicated future commitments, but the reduced sales of mulesed wool now.



Conclusion

In 2023, we have seen significant progress around animal welfare in fashion. More of the selected brands that were rated in 2021 have established animal welfare policies, and a growing number of brands have utilised certifications to recycled material and animal welfare standards. Our research on the selected brands indicated also that the uptake of certifications to recycled and animal welfare standards was likely to encourage greater transparency about the volumes of animal-derived materials used by brands.

An increasing number of the selected brands have also acknowledged that animal-derived materials had a role to play when it came to their environmental footprints. We hope that with the development of more meaningful animal welfare policies and growing awareness around the usage of animal-derived materials and their environmental impacts, brands will take accountability and conscious action to reduce their reliance on animal-derived materials.

Despite all these positive developments, there remain areas where the selected brands continued to underperform, as in the case of brands that used leather and materials derived from wildlife animals. Much needed progress across the selected brands has not occurred fast enough, as in the case of mulesing for wool, as well as for brand investments into next-generation alternatives.

The unwaning and insatiable consumer demand for fashion, the highly profitable fashion market, and the luxury value proposition that brands have attached to animal-derived materials, are not at all conducive to the significant reduction that is needed in farmed animals. Nor is the need for a stable and constant supply of fashion items, high volumes of animal-derived materials used, and competitive pricing conducive to an excellent quality of life for the animals that remain farmed.

While certified recycled animal-derived materials have the potential to reduce, to some extent, demand for virgin

animal-derived materials and therefore the numbers of farmed animals, growing reliance on pre-consumer recycled material sources and increased profitability here has the potential to incentivise the production of virgin animal-derived materials. We must also be weary of the potential for the use of recycled materials to further increase the demand for recycled animal-derived materials without necessarily resulting in the reduced demand for virgin animal-derived materials.

Therefore, the transition to more recycled animal-derived materials is, at best, a means to an end, rather than the end itself. The global fashion industry has already acknowledged the need for a complete overhaul of its systems if it is to not only reduce its carbon emissions and operate within planetary boundaries, but also reverse its impacts on climate change and protect biodiversity^{1,94}. We believe this can be best achieved through the scaling and adoption of next-generation materials.



Recommendations

FOUR PAWS recommends that brands:

1. Introduce meaningful animal welfare policies; and
2. Transparently disclose the volume of animal-derived materials used.

Developing a meaningful animal welfare policy

As animal cruelty persists in fashion supply chains, and more brands are heavily scrutinised for their sustainability claims, the development of meaningful animal welfare policies is more important than ever.

A meaningful animal welfare policy starts with a vision and includes an implementation plan for how to achieve and monitor good animal welfare and transparency. It is important that brands recognise that animal-based supply chains have associated environmental and human rights risks, which these same brands may already be prioritising in their sustainability and social responsibility strategies. As such, animal welfare policies should ideally be considered alongside brands' wider sustainability objectives to inform the vision set out in the animal welfare policy.

A brand's vision could be that animals are not put at any risk in the making of their products, i.e. the brand is, or will be, vegan. This may be especially appealing and feasible for brands that currently use a limited number of animal-derived material types and in relatively small amounts; brands that use only nominal amounts of animal-derived materials; or brands looking to dramatically shift their environmental footprint, for example. Another vision could be that the brand seeks to achieve an excellent standard of animal welfare by working to fulfil the general welfare aims of the Five Domains model.

A set of *measurable and timebound goals* should be communicated as part of the implementation plan for how

brands commit to achieve their selected vision. Goals should contain each of the following and can broadly be categorised under the '3 R's': Refine, Reduce, and Replace. These include commitments to:

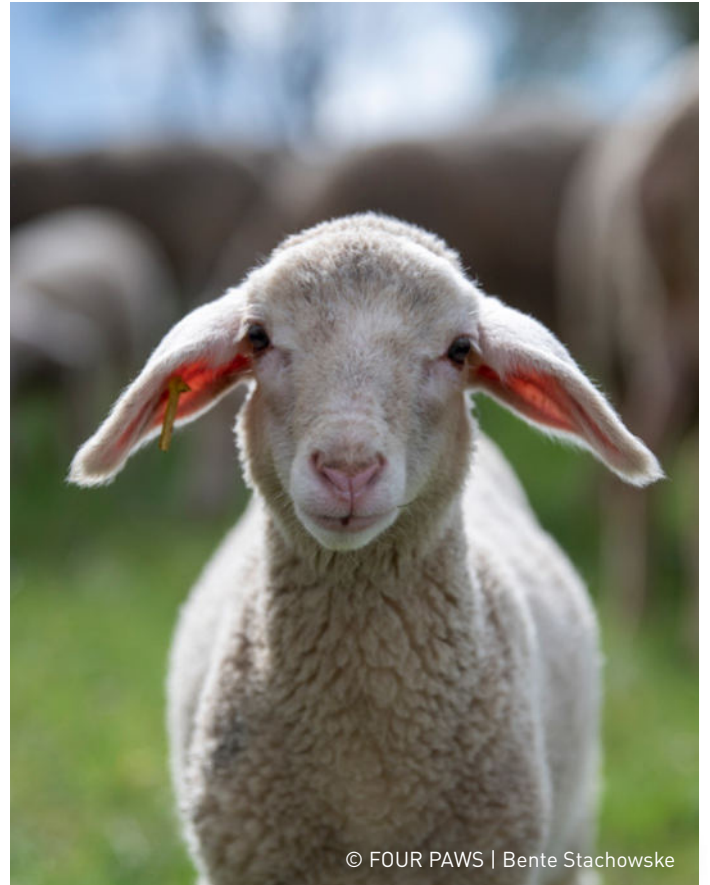
- Use only fully certified animal-derived materials, i.e. refining in the use of animal-derived materials;
- Lowering the reliance on animal-derived materials by increasing the use of lower impact animal-free material types or by reducing production overall, i.e. reducing the use of animal-derived materials;
- Investing in the development of next-generation materials, i.e. replacing the use of animal-derived materials.

A set of position statements should also be communicated as part of brands' implementation plans, addressing the following as a start.

- The decision to not use (or no longer use) any wild animal materials, regardless of the protection status of a species.
- A commitment to prohibiting specific animal welfare practices from the brand's supply chains, such as live plucking (down and feather) and mulesing (wool). Brands should communicate this in conjunction with transparency mechanisms to ensure it is adhered to. For example: "We are against mulesing and only accept non-mulesed wool that has been certified to the ZQ Merino standard."

Brands can demonstrate how they intend to implement their goals and therefore achieve their vision by outlining:

- The types of animal-derived materials they allow today and, in the future, in conjunction with a statement that highlights all other materials as prohibited;
- The types of certifications that brands require for each animal-derived material type;
- Activities that promote their efforts to advocate for animals, e.g. whether brands are signed to the [Fur Free Retailer](#) programme or the FOUR PAWS [Brand Letter of Intent against mulesing](#), donate to animal causes, raise consumer awareness on animal issues, or take part in multi-stakeholder initiatives such as the Textile Exchange Animal Welfare Round Table.
- Initiatives undertaken by brands to improve animal welfare standards, e.g. engaging with supply chains all the way to the farm level, or investing in basic animal welfare requirements not mandated by certification standards such as adequate shelter or more regular veterinary care.



Transparency

The development of a meaningful animal welfare policy has little value to brands if they fail to take steps to monitor and evaluate the progress of its implementation and report on the effectiveness of the policy. Therefore, the final step to ensuring a meaningful policy is to communicate the progress against each of brands' activities and goals, including the:

- total weight of animal-derived materials by type
- percentage of animal-derived materials by type as a proportion of total materials by type
- percentage of certified animal-derived material by type as a proportion of total animal-derived materials by type
- percentage of certified animal-derived material per certification used.

Qualitative information to further demonstrate brands' progress is also ideal. For example, the types of activities and initiatives that brands undertook throughout the reported year to advocate for animal welfare improvements amongst consumers or in their supply chains, any lessons learned, the outcomes or impacts from these initiatives, and brands' plans to continue or build on such activities.

Reporting also provides brands valuable information when it comes time to review their policies. Policies should be reviewed at least every three years to keep up to date with advances in technology and animal welfare knowledge, and new animal welfare certification initiatives.

For more information, brands can refer to the FOUR PAWS [Animal Welfare Policy Development Guidelines for Fashion Brands and Retailers](#). We also intend to develop disclosure guidelines for brands in partnership with Good On You that will be made available via our website.

Good On You ‘animals’

Below we outline the best practice recommendations for brands that use animal-derived materials to benchmark their performance against a rating of ‘Good’ by Good On You.

Criterion: Does the brand have an animal welfare policy?

Animals raised through intensive farming and used by the textiles industry can be subject to inadequate living conditions, painful mutilations, long-term mental stress, among other issues. Intensive farming systems are also connected to adverse environmental and social impacts^{58,95}. A policy provides brands the means to consider animal welfare alongside its environmental and social responsibilities and apply an animal welfare lens to brands’ existing processes and decision-making.

Highest-scoring option in the animal welfare pathway

Brands have a formal animal welfare policy that aims to achieve standards consistent with the Five Domains.

Best practice example

Brands demonstrate the highest-scoring option by limiting the animal-derived material types they source after careful consideration, using the best available standards for each animal-derived material (for ‘conventional’ materials only) that they do use, and outlining additional requirements or undertaking additional activities to achieve higher standards. For example, requiring traceability to the farm or on-the-ground research to assess and carefully choose producers whose practices meet or exceed certified standards.

Criterion: Has the brand committed to avoid the use of materials derived from wild animals?

It is important that any animal welfare policy explicitly address the commercial exploitation and trade of all wild animals due to the inextricable links of the wildlife trade with risks to animal, social and environmental welfare, and especially the risks to biodiversity. For example, indiscriminate hunting and trapping methods put pressure on wild populations and local ecosystems. These practices can not only lead to immense cruelty and suffering for animals, but can also leave the hunted animals’ young injured, forced to fend for themselves, or to die.

Highest-scoring option in the animal welfare pathway

Brands have made a public commitment to prohibit the use of all materials derived from wild animals, regardless of the protection status of wildlife species.

Best practice example

For brands that have never used materials derived from wild animals, these brands have committed to never use them in future. For brands that currently use materials derived from wild animals, these brands have committed to phase out their use by a set date.



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Criterion: Has the brand committed to the reduction or elimination of its use of animal-derived materials?

Commercial systems carry inherent risks to animal welfare. The only way to fully mitigate these is to avoid the use of animal-derived materials altogether. A further impetus for brands to do so is the significant adverse environmental impacts of animal agriculture, and the highly intensive processes required to produce animal-derived materials, which contribute disproportionately to brands' carbon emissions.

Highest-scoring option in the animal welfare pathway

Brands have made a public commitment to eliminate all products by a set date.

Best practice example

None has been disclosed by brands that were rated as part of this report. Nevertheless, we found that brands were increasingly transitioning to at least some portion of certified recycled animal-derived materials to meet both their animal welfare and environmental sustainability goals: a feasible way for brands to reduce their reliance on virgin animal-derived materials until the development of next-generation alternatives can reach critical mass.

Criterion: Has the brand disclosed the amounts of each animal-derived material it uses?

Reporting on the usage of animal-derived materials is part of the due diligence for brands to be transparent about the progress on their environmental sustainability and social requirements, e.g. proportions certified to recycled material and animal welfare standards that also consider environmental and social requirements.

Reporting also ensures that brands take responsibility for effectively implementing, reviewing, and improving their policies.

Highest-scoring option in the animal welfare pathway

For the current or previous year, brands have disclosed each animal-derived material individually by weight *and percentage of total materials used by weight*.

Best practice example

Brands disclose the following breakdowns around usage:

- total weight of animal-derived materials by type
- percentage of animal-derived material by type as a proportion of total materials by type
- percentage of certified animal-derived material by type
 - percentage of certified animal-derived material per certification.



Criterion: For brands that use bovine leather, has the brand committed to fully traceable or certified bovine leather?

Despite increased awareness of environmental issues such as deforestation, the intensification of cattle farming is likely to increase, which is already associated with many animal welfare concerns. Furthermore, the significant environmental footprint of leather at all stages strongly suggests the need for the global fashion industry to move away from its use, and fast. Unfortunately, the development of next-generation alternatives that reflect ideal environmental and animal impacts are still at their infancy.

Highest-scoring option in the animal welfare pathway

Brands have made a public commitment to fully certified recycled leather within five years.

Best practice example

Brands require GRS (Global Recycled Standard) and RCS (Recycled Claim Standard) certification for recycled leather, ideally post-consumer recycled. However, for brands to achieve adequate levels of animal welfare in their leather supply chains, traceability to the farm level and certification to a high-quality food standard are minimum requirements. FOUR PAWS has identified several food certifications where their minimum requirements are better defined (although these do not rule out all cruel practices):

- Beter Leven Dairy/Beef
- Animal Welfare Approved by AGW
- Pasture For Life
- Regenerative Organic Certified - Dairy Gold
- NZ SPCA Animal Welfare Certified Dairy Cattle
- EU Organic Certification
- USDA Organic.

Criterion: For brands that use wool, has the brand committed to fully certified non-mulesed wool?

Many brands that prohibit the practice of mulesing from being associated with their supply chains currently rely on certificates of origin that confirm the mulesing status on a farm. However, audits for voluntarily declared farms only occur for a small sample each year, and the processing and sale of wool make it difficult to ensure mulesed and non-mulesed wool remain separate as they transfer custody. Therefore, for mulesing to be reliably ruled out of brands' supply chains, it is important that brands can trace the entire supply chain from final product back to the farm. Difficult for brands to achieve on their own, this level of end-to-end traceability is currently offered by a range of certification standards that also prohibit mulesing.

Highest-scoring option in the animal welfare pathway

Brands have made a public commitment to fully certified recycled wool by 2025 for large brands, or within five years (by 2028) for small brands.

Best practice example

Brands require GRS certification for recycled wool, ideally post-consumer recycled. However, brands that publicly communicated their transition to fully certified non-mulesed wool by 2025 or by 2030 via the FOUR PAWS [Brand Letter of Intent against mulesing](#) were awarded 80% and 60% of the total points, respectively.

Criterion: Which of the following ‘conventional’ animal-derived materials (leather, wool, cashmere, alpaca, mohair, down) does the brand use and are any of these certified to recycled material or animal welfare standards?

For the animal welfare pathway, the best option for the use of ‘conventional’ animal-derived material types is to use their certified recycled counterparts. While the non-use of material types in this pathway is not awarded points, the fewer the animal-derived material types used in brands’ supply chains, the more points awarded in the subsequent section of the total materials score.

Highest-scoring option in the animal welfare pathway

Brand uses 100% GRS certified animal-derived material. We considered this the most robust certification from an animal welfare perspective because it requires a higher percentage of recycled material and does not allow mixing with the virgin uncertified material counterpart.

Best practice example

Brand uses 100% GRS certified animal-derived materials, ideally post-consumer recycled. However, brands that used animal-derived materials 100% certified to animal welfare standards which ideally offer end-to-end supply chain traceability were awarded points based on a weighted value of 85% of their total attainable score for the material type, i.e. limited by the proportions of certified material used and the amount of the material type in proportion to total animal-derived materials.



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Criterion: Which of the following ‘higher risk’ animal-derived materials (fur, angora, any materials from wildlife or from farmed species where the wild species counterpart could become endangered, e.g. Bactrian camel, yak) does the brand use?

The production of such materials is often associated with severe animal welfare deficits²⁶. The animal-derived materials considered here mainly come from wild species which have not been domesticated and are therefore inherently vulnerable to suffering in confinement or due to the hunting and trapping of animals in the wild^{27, 28, 29}. The intensive systems in place also do not consider the natural needs of the animals³⁰, and often cruel catching and trapping methods are used³¹.

Highest-scoring option in the animal welfare pathway

Brand does not use any ‘higher risk’ animal-derived material types.

Best practice example

Brands do not use ‘higher risk’ animal-derived materials and have explicitly communicated its commitment never to use these.

Criterion: How many animal-derived material types are being used in the brand’s supply chains?

The use of multiple material types involves many different species of animals, with each species bringing a host of animal welfare requirements and risks – much more than what brands are realistically capable of managing and mitigating directly.

Moreover, brands that used significant volumes of one material should not score significantly lower than brands that used small amounts of many animal-derived materials, as the total amount of materials used by the former may add up to be the same as those used by the latter.

Highest-scoring option in the animal welfare pathway

Number of animal-derived material types = 1.

Best practice example

Brands limit their use of ‘conventional’ animal-derived material types through careful consideration.



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FOUR PAWS remains committed to our vision of an animal-friendly fashion future and aims to mark the progress made by brands over the next 12 months in the next iteration of the Animal Welfare in Fashion report.

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About FOUR PAWS

FOUR PAWS is the global animal welfare organisation for animals under direct human influence, which reveals suffering, rescues animals in need and protects them. Founded in 1988 in Vienna by Heli Dugler and friends, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. The sustainable campaigns and projects of FOUR PAWS focus on companion animals including stray dogs and cats, farm animals and wild animals – such as bears, big cats and orangutans – kept in inappropriate conditions as well as in disaster and conflict zones. With offices in Australia, Austria, Belgium, Bulgaria, France, Germany, Kosovo, the Netherlands, Switzerland, South Africa, Thailand, Ukraine, the UK, the USA and Vietnam as well as sanctuaries for rescued animals in eleven countries, FOUR PAWS provides rapid help and long-term solutions.

FOUR PAWS has achieved many lasting improvements for animals used within the textiles industry, including:

- Launching the Wear It Kind animal-friendly fashion programme which encourages and advises brands on how to develop and implement meaningful animal welfare policies and has been supported by over one million people internationally.
- Continued support of the highly successful Fur Free Retailer programme, a global initiative run by Fur Free Alliance member organisations which over 1,500 brands and retailers have joined to stand united in their commitment against the use of fur.
- Exposing the cruelty of mulesing in the wool industry – over 350 brands have since expressed their opposition to the use of wool from mulesed sheep.
- Working with the European bedding and global outdoor clothing industries to lead a successful transition away from using down from live-plucked and force-fed ducks and geese.



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