



tearfund

The 2017 Ethical Fashion Report

THE TRUTH BEHIND THE BARCODE



THE 2017 ETHICAL FASHION REPORT

THE TRUTH BEHIND THE BARCODE

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Behind the Barcode is a project of Baptist World Aid Australia

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Executive Summary

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

EXECUTIVE SUMMARY

OVERVIEW

This is the fourth report produced by Baptist World Aid Australia examining labour rights management systems in the fashion industry. It grades 106 companies, from A to F, on the strength of their systems to mitigate against the risks of forced labour, child labour, and exploitation in their supply chains.

The first report was published in the wake of the industry's most tragic disaster; the 2013 Rana Plaza factory collapse in Bangladesh, which claimed the lives of 1,134 garment workers.

Since that time, the Report has benchmarked and tracked the efforts of fashion companies to ensure that the rights of the workers who make their products are upheld. These rights including a safe work place, a living wage, and freedom from slavery. The report has grown in scope and industry engagement every year since its release. It now assesses more than 2.5 times the number

of companies of the first report, with 83% of companies being actively engaged in the research process. And this year, for the first time ever, the Ethical Fashion Report is being released in New Zealand, expanding beyond its traditional Australian release.

Since the tragedy in Bangladesh, efforts to improve conditions for fashion workers have accelerated, spurred on by increased public scrutiny and concerted consumer calls for change. But the need remains pressing.

Overall Grades: A–P

* = non-responsive companies

EXECUTIVE SUMMARY

OVERVIEW

The Asia Pacific has become the world's garment factory, with more than 40 million workers employed in manufacturing apparel and textiles across the region. For the vast-majority of these workers, wages remain at levels well below what is needed to lift them and their families out of poverty.

The International Labour Organisation (ILO) estimates that more than half of the world's forced labourers (11.7 million), and that 78 million of its child labourers are in this region. Apparel is a high-risk industry for these practices, being

both labour intensive and prone to employing vulnerable workers. The US Department of Labor reports forced and/or child labour is used in garment, textile and footwear manufacturing throughout the region, including in China, India, Bangladesh, Malaysia, Vietnam, Indonesia, Cambodia, and Pakistan.

And though safety standards are improving for this industry, progress is slow. Factory fires and unsafe working conditions remain a persistent problem.

These 106 companies represent 330 brands, to see the grades of specific brands, go to the Brand Index on page 47.

Overall Grades: P-Z

OVERALL GRADE	A	D-	B	C+	C	C+	C+	C+	C+	B+	F	A+	B-	C-	C+	C+	C+	C+	B-	R.M. Williams	Roger David*	Rip Curl	Quiksilver	Retail Apparel Group	PVH Corp	Puma	Pavement United Brands*	Patagonia
Policies	A-	F	D+	B	C+	C+	C+	C+	C+	A+	F	F	A+	Simon de Winter	Specialty Fashion Group	Sussan Group	Target Australia	The PAS Group	The Warehouse Group*	UNIQLO	Voxager Distributing Co*							
Knowing Your Suppliers	A+	F	C	C+	C-	C	C	C	C	D	D+	D+	B-	C-	B	A-	A-	A-	A-									
Auditing & Supplier Relationships	A-	F	C	D+	C	D	D+	D	D	D	D+	D+	B+	C+	C+	D+	D-	D-	D-									
Worker Empowerment	B-	F	F	D+	D+	D+	D+	D+	D+	D	F	F	D+	C+	C+	D+	D-	D-	D-									

* = non-responsive companies



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EXECUTIVE SUMMARY

INDUSTRY OVERVIEW

106


companies assessed

C+

median grade

13
A

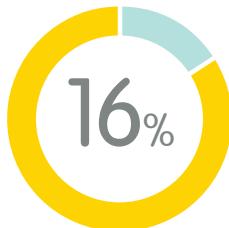
companies received
A range grades

10
F

companies received
F grades

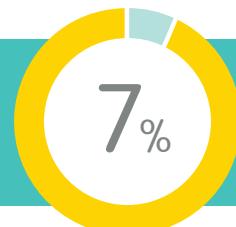
China remains the most common country for production, followed by India, Bangladesh, Vietnam and Thailand.

2016 2017



While transparency remains a challenge in the industry, we have seen an improvement with the percentage of companies publishing full supplier lists going from 16% to 26% in the last year alone.

Tracing of raw materials remains a huge challenge with just 7% of companies knowing where all of their cotton is coming from.



D+

Investing in supplier relationships is high on the priority for many companies:



67% of companies are making efforts to train suppliers, buyers and factory managers to understand human trafficking, child labour, and forced labour risks.



77% of companies are working to actively improve leverage and relationships with suppliers, through supplier consolidation and/or industry collaboration?

Worker Empowerment remains the area where the most work still needs to be done, with the median grade for that section of our assessment being a D+.

EXECUTIVE SUMMARY

INDUSTRY PROGRESS

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



59%

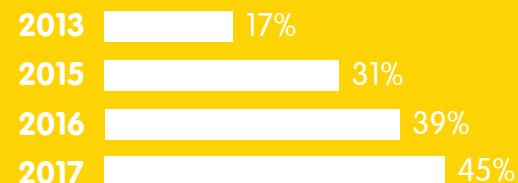
59% of companies assessed in the 2016 Report improved their grade in the 2017 Report

Traceability deeper into the supply chains has increased steadily over the last four years:

Companies tracing inputs suppliers



Companies tracing raw materials suppliers

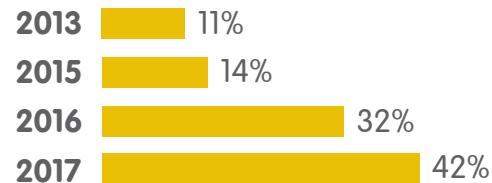


2017



42%

The number of companies investing in paying fairer wages to workers



2016



The percentage of companies tracking the presence of trade unions and collective bargaining agreements in the majority of their factories has doubled since 2016.

EXECUTIVE SUMMARY

KEY FINDINGS

Key Findings

Company Performance

Niche ethical producers have consistently been the best performers when it comes to strong labour rights management. *Etiko*, *Mighty Good Undies*, and *RREPP* all scored the top grade, A+. These companies knew their suppliers from farm to

factory and were willing to publicly disclose where they were producing. *Etiko* and *Mighty Good Undies*, also demonstrated that many of their suppliers were paying a living wage.

Of the multinational companies, *Patagonia* and *Inditex* (*Zara*) scored the highest with an A grade. *Inditex* was particularly strong on tracing and

monitoring suppliers back to fabric production (second tier suppliers), while *Patagonia* has done relatively more to trace its raw materials (third tier suppliers) and demonstrate improved wages for workers.

Cotton On Group, *Pacific Brands* and *APG & Co* were the best performing mid-to-large size companies headquartered in Australia, both scoring an A-. New Zealand's best performers were *Kowtow* and *Liminal Apparel*, both scoring an A grade.

One of the most encouraging trends has been the continued improvement in company efforts. Over the past 12 months, *Macpac*, *Oroton Group*, *Lululemon Athletica*, and *Karen Walker* have all demonstrated significant increases of investment in their labour rights approach. Each have moved into the B grade range. *Oroton Group*, for instance, tightened its policies, invested substantially in identifying the factories it sources from, and improved its supplier relationships. Subsequently, its grade moved from D+ to B-.

Supplier Knowledge

Knowing suppliers is a key pillar of a strong labour rights management system. If brands don't know or don't care who their suppliers are, there is virtually no way of ensuring that the workers who make their products are not being exploited. It is encouraging, then, that this continues to be one of the most significant areas of improvement within the fashion industry.



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EXECUTIVE SUMMARY

KEY FINDINGS

The 2017 Ethical Fashion Report found that more than three quarters of assessed companies knew each of their final stage manufacturing suppliers (first tier). For most companies, it is at this stage of the supply chain that they have the strongest relationship. Thanks to this strong visibility, the worst forms of exploitation, forced labour, and child labour are now far less prevalent at this stage of the supply chain.

However, deeper into the supply chain, where visibility is far less, the risks remain substantial. Encouragingly though, companies are increasingly identifying their suppliers beyond the first tier. The 2017 Ethical Fashion Report found that 81% of companies are now actively tracing their fabric suppliers (second tier); this is up from 49% in 2013. Furthermore, 39% of companies now know all, or almost all, their second tier suppliers (up from 24% in 2013).

But perhaps one of the most exciting developments is the improved knowledge of their raw material or third tier suppliers (usually cotton farms). As the majority of the world's child labourers work in agriculture, the risks at this stage of the supply chain are acute.

When Baptist World Aid began this research in 2013, most companies argued that tracing back to the farm was outside their scope of control and responsibility. At the time, raw materials tracing was largely restricted to Fairtrade companies. Now 45% of companies are seeking to trace their cotton suppliers, with many working

collaboratively through the Better Cotton Initiative (BCI) to do so.

BCI is a multi-stakeholder initiative that works with brands, NGOs, farms, and cotton-traders to improve social and environmental protections, and increase farm yields (read more on page 36). Amongst mid-to-large companies, *Kathmandu* has been a stand out performer when it comes to tracing raw materials. By using a combination of BCI and Fairtrade cotton, *Kathmandu* has traced almost 80% of its cotton supply and through Responsible Down Sourcing has traced 100% of its down supply.

Transparency

One of the most notable trends for the industry has been the improved corporate transparency around supply chain practices. Transparency demonstrates a company's willingness to be accountable to consumers, the public, and their workers. Transparency is critical to companies that wish to build trust.

One significant element of transparency is the publication of a list of suppliers that includes their business names and addresses. Since the release of the last Australian Fashion Report, the proportion of companies publishing supplier lists has substantially increased from 16% to 26%. The move towards transparency is even more notable amongst companies that have been engaged with this project since it began in 2013; 45% of those companies are now publishing their supplier list.

Companies that have published supplier lists in the last year:

- APG & Co
- Big W
- Brand Collective
- Cotton On Group
- Designworks
- Esprit
- Hanesbrands
- Jeanswest
- Lululemon Athletica
- Pacific Brands
- R.M. Williams
- RREPP
- The PAS Group

These lists make it far easier for journalists, NGOs, workers and unions to verify that the claims companies make about their labour rights systems are accurate, and that they are working as intended. Workers and unions can also use these lists to communicate directly with brands about their grievances and concerns, and agitate for change.

Also, several companies have made significant disclosures about their labour rights systems in the past year. The increased openness from *General Pants*, *Gorman*, *Seed Heritage*, *Factory X*, and the *Brand Collective* group of companies is commendable. By sharing more about their labour rights systems, they help consumers understand what efforts they are taking to ensure the rights of workers are upheld.

EXECUTIVE SUMMARY

KEY FINDINGS

Non-Responsive Companies and Low Transparency

Low transparency is often one of the biggest determinants for why some companies receive the lowest grades. Companies are graded based on a combination of publicly available information and any information they are willing to disclose to the report's researchers. As mentioned previously, 83% of companies choose to engage, with most seeing benefit in the process of being benchmarked and gaining feedback.

Nike and *The Warehouse* are examples of companies that still scored relatively well with C range grades, even though they did not directly engage with the research process. This is largely due to their strong commitment to public transparency.

However, several companies have chosen not to disclose or make any information publicly available. Without this information, it becomes nearly impossible for the public to make informed decisions about whether companies are investing sufficiently to ensure that workers are not being exploited. For this reason, these companies have been awarded an F grade in this report.

For more information about the research process and non-responsive companies, refer to the methodology (page 16). Non-responsive companies were also given the opportunity to provide a statement about why they chose not to engage with this research. These statements are included on page 80.

Living Wage

The fashion industry continues to grow each year, and is among the most labour intensive industries in the world. It is also a significant driver of employment for groups who have traditionally struggled to find good jobs — women, migrants, and young people. Sadly, this cross section of society is also amongst its most vulnerable and, in many cases, rather than providing decent work, the fashion industry has exploited them.

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

The benefits of a living wage are substantial. In fact, payment of a living wage could transform the lives of millions by allowing people to lift themselves out of poverty and, at the same time, drive economic growth within communities and nations. Where living wages are being paid, the likelihood of other forms of exploitation such as forced labour and child labour fall dramatically. Finally, given the importance of wages to workers, being able to demonstrate that workers are receiving a living wage is one of the most telling signs that a corporate labour rights system is genuinely responsive to the needs of workers.

It is encouraging then, that the proportion of companies seeking to improve wages has



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EXECUTIVE SUMMARY

KEY FINDINGS



Photo credit: Baptist World Aid Australia

At a sewing factory in Cambodia.

continued to rise. In 2013, the proportion of companies that could demonstrate improved wages for workers was 11%, it has risen each year and now stands at 42%. It is worth noting however, that (in most cases) wages are still below a living wage level and only apply to a portion of workers in the supply chain.

Ethical Brands such as *Liminal Apparel*, *Etiko*, *Mighty Good Undies*, *Freeset*, *Nudie*, *RREPP*, and *Kowtow* were the stand out performers for living wage payment. They each demonstrated that a significant proportion of workers in their manufacturing factories were receiving living wages, a number also demonstrated living wages for their fabric production.

Hanesbrands is one of the leading companies among larger producers. More than 80% of its manufacturing, and a significant proportion of its fabrics production, comes from company owned facilities. *Hanesbrands* pays workers in all these facilities a living wage.

Other commendable efforts include *Kmart Australia*, which has benchmarked wages in a few of its Bangladeshi facilities and is now beginning to implement initiatives to raise wage levels (see page 46 for more information); *Patagonia*, which pays a premium in its Fairtrade USA certified factories to directly benefit workers; and companies that are accredited with Ethical Clothing Australia (ECA). ECA ensures that wage levels and working conditions for Australian production (at a minimum) meet with Australian standards (see page 43 for more on ECA).

Companies accredited with ECA include *Anthea Crawford*, *JETS*, *Cue Clothing*, and *R.M Williams*.

Trade Unions and Collective Bargaining

It is workers that have the best visibility over workplace conditions. One of the most effective ways to address exploitation is ensuring that workers can organise and collectively bargain to see their rights realised. Research by the ILO has affirmed that nations with higher levels of collective bargaining also have a tendency toward better wages for low income earners.

While progress in the last year has been promising in this area, the challenge remains substantial. The number of companies that could report that at least 50% of their suppliers had democratically-elected trade unions, or collective bargaining agreements has doubled since our 2016 research – however this is from a very low base. The proportion still languishes at around one out of every five facilities.

The low levels of unionisation and collective bargaining reflect one of the most troubling challenges identified in our research: worker empowerment. This has consistently been the worst performing area for the industry. In the 2017 Ethical Fashion Report, the median grade for this pillar of companies' labour rights management systems was a low D+. To turn this around the industry must do more to listen and respond to worker voice, and in particular, improve efforts towards collective bargaining and the payment of a living wage.

EXECUTIVE SUMMARY

CONCLUDING COMMENTS

Concluding Comments

The garment industry can be a tremendous force for good.

In Cambodia, the industry employs 700,000 workers, around 4.5% of the population. In Bangladesh, the number of people employed by the industry has doubled in the last decade, and is now above 4 million.

Cambodians have been able to agitate for a near tripling of the minimum wage for garment workers, despite heavy handed (and at times lethal) government crackdowns. And with global attention drawn to Bangladesh, wages have increased 87% and factory safety has improved substantially.

Beyond jobs, garment production generates over a trillion dollars of export revenue, predominantly for low and middle income countries. In Bangladesh and Cambodia, the industry respectively accounted for 89.2% and 77.4% of total merchandise exports in 2014.

The industry has fuelled the growth of economies and at the same time, facilitated millions of people migrating from lives of subsistent rural agriculture into factory work, giving them hope of a better life for themselves and their families.

However, we know that wherever measures haven't been sufficient to uphold the rights of workers, the industry has also driven forced labour, child labour, unsafe working conditions and exploitation.

Expectations of the role of individual companies to address these issues have changed. Once,

companies could argue that the responsibility to uphold worker rights rested with their suppliers. Now, cultural and consumer expectations have shifted and, as they've changed, so too has the political and regulatory environment.

California, the United Kingdom, and the European Union have each introduced regulations that require companies to disclose what they are doing to address slavery risks throughout their supply chains. The French and the Dutch governments have gone a step further, calling for mandatory plans to address labour rights and environmental risks. Australia, inspired by the UK's Modern Slavery Act, has just announced an inquiry into whether similar legislation should be nationally adopted.

This shift in expectations has been welcome, and the progress that the industry has made has been commendable. But consumers, companies, and governments can still do more to help accelerate these gains.

You, as consumers, can do more by preferencing those companies doing the most to uphold the rights of workers in their supply chains, and by calling on those that aren't to do better.

Companies can do more by strengthening their labour rights systems and by ensuring that workers, from farm to factory, receive a living wage. And the Australian and New Zealand governments can do more by introducing legislation requiring companies to publicly report on the measures taken to address slavery and exploitation throughout their supply chains,

emphasising those areas of the supply chain that are of higher risk.

This report hopes to assist those efforts and, in doing so, help the fashion industry realise its potential to contribute to a world free from poverty and exploitation.

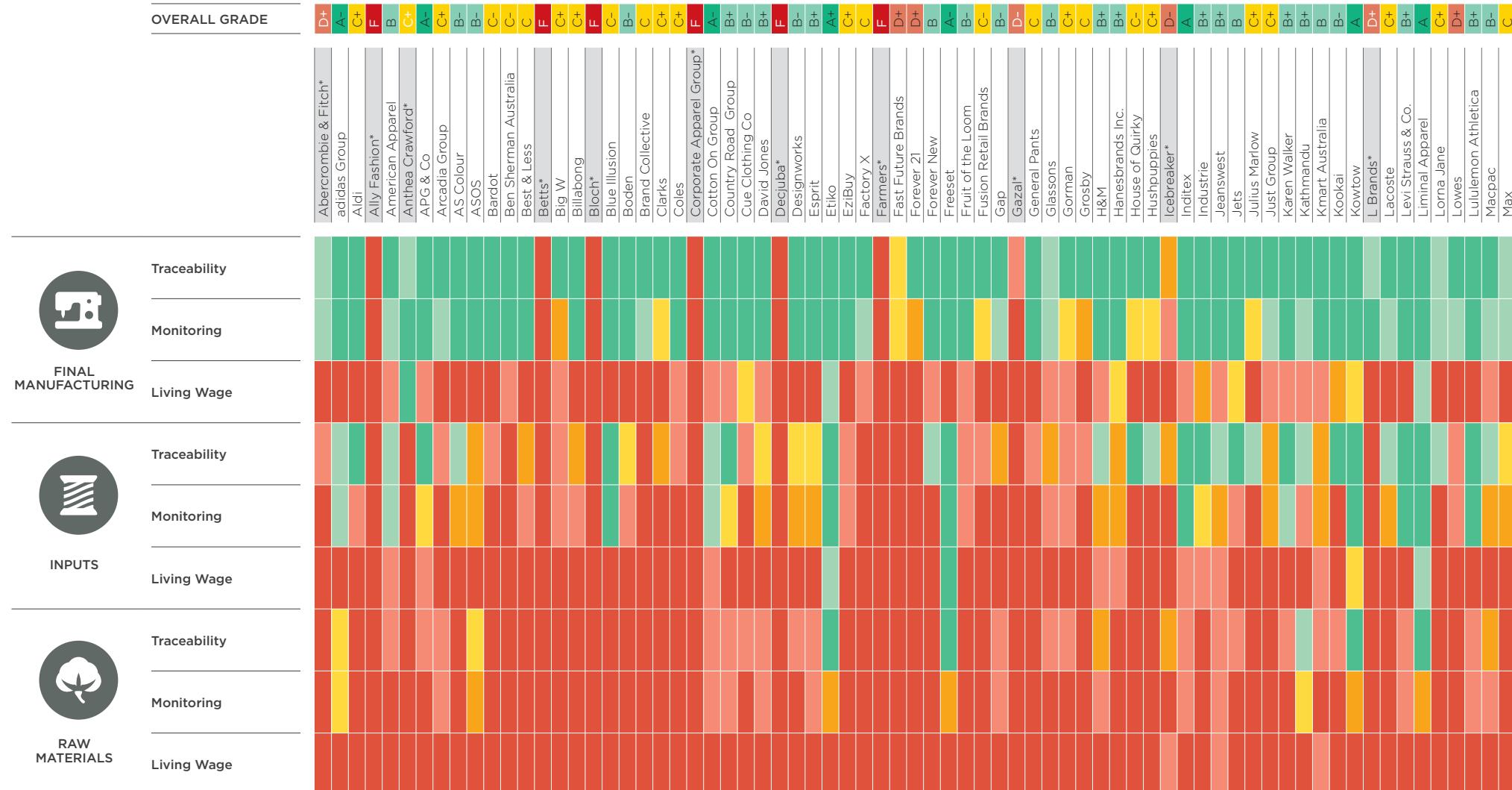
Photo credit: Daro Sulakauri/Asian Development Bank, used under Creative Commons License 2.0.



At the Turkmenbashi Tekstil Kompleksi in Turkmenistan, where over 3,000 mainly female workers are employed.

EXECUTIVE SUMMARY

VISUAL OVERVIEW A-M



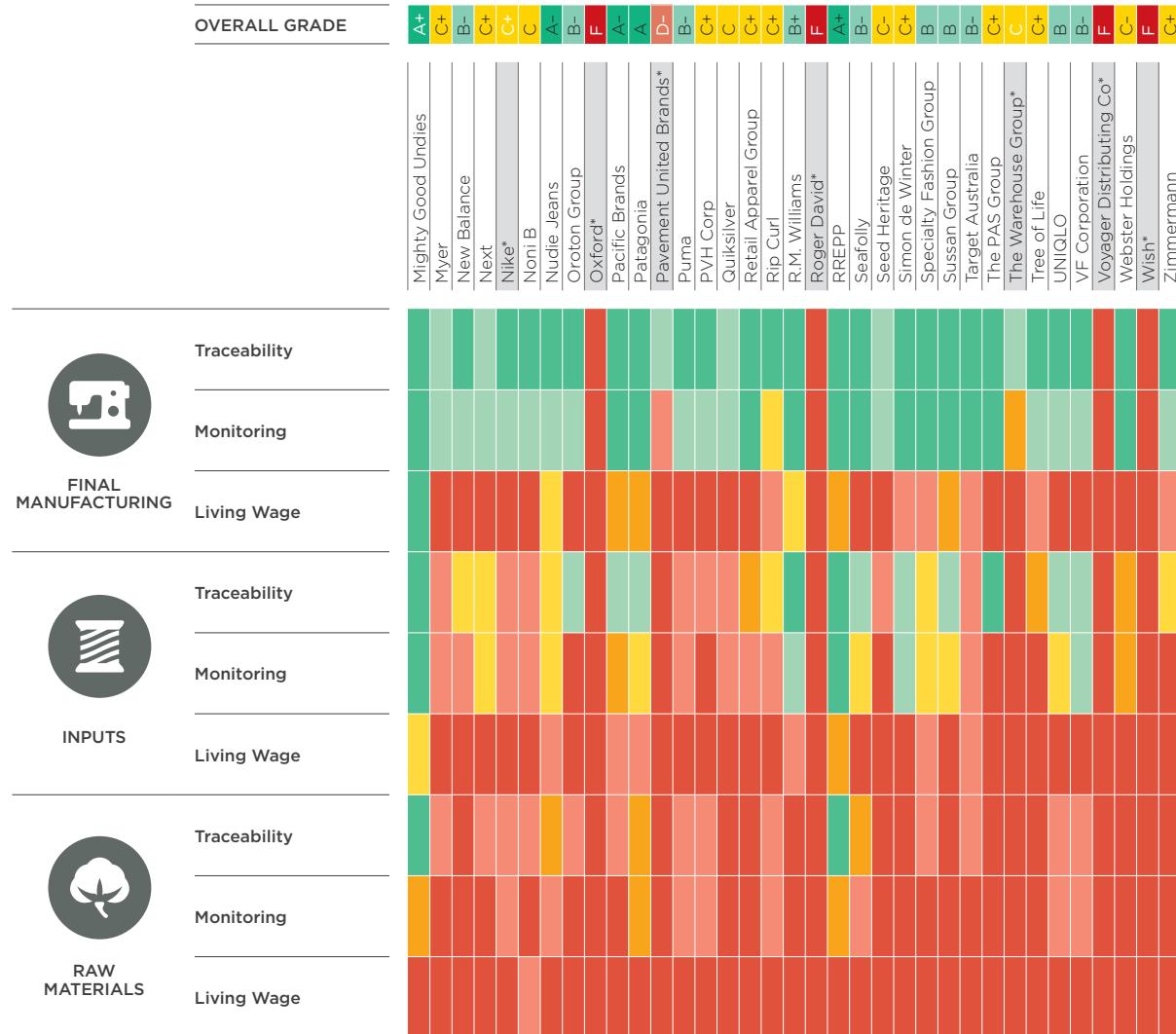
Key: 100% 76-99% 51-75% 26-50% 1-25% 0%

* = non-responsive companies

EXECUTIVE SUMMARY

VISUAL OVERVIEW

M-Z



This table provides a summary on how companies have performed on three of the most significant elements needed for a strong labour rights management system. It breaks down by tier of the supply chain the percentage of facilities that have been traced, are being monitored and are paying workers a living wage.

Methodology

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

METHODOLOGY

Aims

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

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

At a system level, we recognise the positive impact that the apparel industry can have around the world. Our goal is to contribute to ending worker exploitation and alleviating poverty in the developing countries where apparel is manufactured.

Scope of the research

Our research classifies the garment manufacturing supply chain into three stages of production: final stage, inputs stage and raw materials, as defined on the following page. Across these three stages of production, we look at four broad themes of social responsibility: policies, knowing suppliers, auditing/supplier relationships and worker voice, also defined on the following page.

While a number of the areas we assess will provide a proxy for how well a brand is able to manage its environmental impacts, we do not directly assess environmental impact for this report. It is our intent that this will be a part of our future research.

In 2017, our research covered 106 companies of varying sizes across men's, women's and children's apparel and footwear. It is worth emphasising that Baptist World Aid Australia does not do site inspections of factories. Therefore, our ratings are not an assessment of actual conditions on the ground, but rather an analysis of the strength of a company's labour rights systems. We rely on data that is publicly available, alongside evidence of systems and practices that are provided by companies to conduct our assessments.

Data collection

We assess a large selection of companies on 40 specific criteria at three critical stages of the supply chain as a proxy for the entire fashion supply chain.

In conducting a brand evaluation, our research team first assesses a brand's own publications alongside any relevant independent reports and data. Our team then sends its findings — marked against the assessment criteria outlined above — to the brand for comment and further input, which is reviewed in turn. We seek to engage with brands, collect evidence and understand their processes and systems; however, our research team does not conduct any factory floor inspections as part of the grading process.

Comment on non-responsive companies

Brands which are non-responsive, along with those that do not provide any substantive information, are indicated in this report by an asterisk next to their name. They were also given the opportunity to provide a short statement as to why they chose not to respond, and these can be found on page 80.

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

We actively seek to engage brands (and pursue contact with non-responsive brands) using at least three different mediums: phone calls, emails and letters. All non-responsive companies receive our findings twice by post. Letters are also mailed to the board chair and CEO. This process ensures that in almost every instance where a brand has not responded, it is because it has intentionally chosen not to do so.

In this edition of the report, 83% of brands have engaged directly with our research process.

METHODOLOGY

What the research covers

Our research collected and evaluated data from apparel companies using the following classification of the supply chain and themes of social responsibility.



RAW MATERIALS

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



INPUTS PRODUCTION

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



FINAL STAGE PRODUCTION

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

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

METHODOLOGY

Data evaluation

To verify the data provided by companies, we review company responses and ask for clarification and supporting documentation. In some instances, we have relied on audit data provided to us by companies to verify conditions and benefits that workers receive.

Our research team and company representatives work through the survey questions until both parties are satisfied that the data presented is an accurate representation of the company's policies and processes.

To ensure consistency in our assessment of companies, after finalising company responses, we cross-check survey responses. This means that all data is reviewed at least three times by three different people.

We then evaluate the data collected by using a survey tool developed with input from supply chain specialists, NGOs and company experts. This tool provides a grade for each company and across each area of our research.

Grading

The grades awarded in this report are a measure of the efforts undertaken by each company to mitigate the risks of forced labour, child labour and worker exploitation throughout their supply chains. Higher grades correspond to companies with a labour rights management system that, if implemented well, should reduce the risk and extent of worker exploitation in the production



Men unloading cotton from a truck.

Photo credit: Adam Cohn, used under Creative Commons Licence 2.0.

of that company's products. Low graded companies are those that are not taking these initiatives, or those choosing not to disclose if they are taking such initiatives.

It is important to note that a high grade does not mean that a company has a supply chain which is free from exploitation. Rather, it is an indicator of the efforts and the strength of the systems a company is undertaking to reduce the risk of exploitation. Furthermore, our grading methodology is designed to spread companies out along the 'A-F continuum' based on the relative

strength of their efforts, similar to awarding grades on a bell curve (i.e. best performers receiving A's, worst receiving F's and many in the middle).

Some company structures encompass several brands with differing labour rights management systems. In these cases, we have graded brands separately and provided an average for the company that owns or distributes them. Individual brands corresponding to a single company are listed, alongside their grade, in the Brand Index on page 47.

MADE IN ...

This section examines the prevalence of child labour, forced labour and worker exploitation in a global context. It provides insights into specific risks of abuse that exist in garment production across multiple countries, as well as stories of the positive impact the apparel industry can have on the lives of workers.

All stories and images are used with permission.

MADE IN ... BANGLADESH

The garment industry is central to Bangladesh's economy, employing around 5 million workers. Cheap labour makes Bangladesh a popular sourcing country for foreign companies. However cheap labour means exploitative low wages and risk-filled working conditions — the Rana Plaza collapse was a prominent but far from isolated incident in a series of deadly factory accidents.

The Accord: Improvements in safety

Two hundred and seventeen companies, NGOs and global and Bangladesh trade unions have signed the Accord which covers 1,661 factories. The Accord is more than lip-service or a symbolic

gesture, as it is a legally binding agreement and brands are collectively contributing \$10 million towards guaranteeing a safe working environment for the garment industry in Bangladesh.¹

Three years since its inception in 2013 as a response to the Rana Plaza tragedy, close to 3,700 inspections and re-inspections have been conducted. According to Union Network International (UNI), one of two global union signatories, over 100,000 safety issues have been identified and more than half of these have now been reported or resolved.²

The Accord: Still a long way to go

Awareness of building safety in Bangladesh and global will to improve conditions remain strong, but while the Accord (and the voluntary

Alliance for Bangladesh Worker Safety) has made important adjustments to the garment industry there, many insist that change is still too slow. Inspections are behind schedule. The Accord covers only 60% of Bangladesh's RMG industry, and the Accord's own executive director estimates that less than half of all exporting factories have been inspected.³ In other words, there may be as many as 3.5 million workers who still have no protection against hazardous labour conditions.

Global will also stands opposed to the Bangladeshi government's inertia in prosecuting those responsible for Rana Plaza and other factory tragedies in the country — Although culpable homicide charges have been laid against factory owners like Delwar Hossain (Tazreen Fashions factory fire, 2012), at the time of this report's publication not one factory owner has been successfully prosecuted.

And, while the spotlight is on safety in Bangladesh, the country's minimum wage does not constitute even a quarter of the estimated living wage.⁴ Millions of Bangladeshis remain unable to provide for their families' basic needs.

1 Bangladesh Accord: Guide for Potential Signatories 2015.

2 UNI Global Union — The Bangladesh Accord. Includes 75% of electrical problems resolved. According to UNI, 53,091 of 103,846 (51%) hazards reported/resolved; according to Accord executive director, Rob Wayss, 64%; see Kaye 2016.

3 Kaye 2016.

4 Global Living Wage Coalition.



Dhaka, Bangladesh. The country's capital is home to an estimated 14.5 million people, many of whom work in the apparel industry.

MADE IN ... BANGLADESH

SALAHEYA'S STORY: Struggling to support her family

Salaheya Khatun was a child bride and teen mother who suffered brutal domestic violence before she found a homeworker job stitching quilts. But poverty led her to leave her family and become a garment worker at a popular UK retailer's supplier in Dhaka.

Now in her mid-20s, Salaheya is working 72-hour weeks and earning just 7000 Taka a month (roughly AUD\$113). That's only about half of a living wage!¹

Sewing from 8am to 5pm, she then does three hours of overtime before returning to her room in a nearby slum, a tiny space she shares with two other garment workers. Salaheya only sees her daughter once every two to three months — her parents care for the child, but they live in a village six hours away.

Because she is sending her parents almost half of her 7000 Taka salary to help care for her daughter, Salaheya cannot afford to cover her own basic needs.

"I am in debt by around 1000 Taka every month because I need to pay for groceries and supplies on credit. I need to find work at a factory with a higher salary," she says. "I just want to be able to support my family."



Bangladeshi garment worker Salaheya Khatun.

Salaheya also explains that the factory where she works is hostile to unions — about 50 employees were fired for attempting to join one. She sees brand representatives visit the factory but has never been given the opportunity to speak with them.

"I just want to be able to support my family."

Salaheya, Bangladeshi garment worker

¹ Global Living Wage Coalition.

MADE IN ... CAMBODIA

Apparel is key to Cambodian industry, making up 80% of the country's total exports. 700,000 workers make garments for a living, supporting around 2 million Cambodians.

Minimum wage and unionisation

Cambodia has developed a niche for ethical production in the garment industry, being the first country in the world to make International

Labour Organization (ILO) factory assessments a prerequisite for exporting factories. They've gone a step further by publishing those audits.

It's been 15 years since the ILO's Better Factories program began in Cambodia. Relative to other apparel-producing countries, Cambodia is strong on worker wage and voice. Almost all factories are now paying a minimum wage and there is a high level of unionisation thanks to Better Factories.

In fact, the two are related: because 60–80% of garment workers belong to 30 unions and associations — compared to 5% across other industries — these labour unions can advocate on behalf of almost 600,000 workers.¹ Thanks to dialogue and conflict resolution between employers and employees, workplace rights education, legal support for workers, and public media campaigns on the plight of garment workers, industry wages have climbed to US\$153 per month in 2017.²

Piece wages and gender inequality

Despite the positive changes seen with respect to wages, there are some concerning signs that 'piece wages' may compromise worker safety. Earning a piece wage, rather than a salary based on hours worked, means that a worker is paid per garment. The pressure to create more clothes in less time puts workers at risk of exhaustion and incentivises overtime. Product quality also deteriorates as a result.

Another point of concern is the uneven impact of conditions on women, who make up 90% of garment industry workers. Piece wages and the lack of job security afforded by short-term contracts weaken both the health of overworked women and their position within their own households and communities.

Photo credit: Chhor Sokunthea / World Bank; used under Creative Commons Licence 2.0.



A garment worker in Phnom Penh sews garter to a skirt.

¹ Merk 2016.

² Deutsche Welle 2016.

THEARY'S STORY: From garment worker to development professional

Theary Som had heard that being an apparel worker was a good employment opportunity to set you up for your future. So, at 16, she left high school and moved with her family to Phnom Penh, where she found a job at a garment factory.

She, like the five hundred other Cambodian men and women at the factory, worked for a Chinese company producing uniforms for a US brand. She spent seven years working here, and a total of eight in Cambodia's garment factories.

When Theary first started as a sewer, Better Factories did not yet exist in Cambodia and the conditions for workers were poor. Only one of her co-workers was a union member. Theary's workday started at 7am and officially ended at 6pm; one hour was given for lunch, but she regularly worked an additional two hours of overtime in the evening. She was there seven days a week, with only one day off a month.

It was exhausting work but Theary was committed to preparing for her future. In her gruelling time as a sewer, she managed to save up enough money to leave the garment factory and study English. With these language skills, she found a job at a not-for-profit, where she has now been for six



Theary Som left the Cambodian garment industry to study English and now works for an NGO serving her local community.

years. During that time, she received a university degree in accounting.

Theary now coordinates an education program for poor children in her community. She has loved watching the kids grow — some of her former students are now teenagers. She says their English is now better than hers!

Theary is still in contact with her friends at the garment factory. And even though they tell her that conditions have improved, they still look at Theary and tell her how blessed she is to have made a better life for herself and her family. She has shown them there is a future beyond the apparel industry factories.

Photo supplied by Theary Som.

MADE IN ... CHINA

China is the world's largest textiles producer. In 2015/16, it fell to second place behind India in cotton production, but remains the biggest consumer of cotton, importing from countries like the United States. China continues to lead the world in polyester production. The Country is also infamous for restricting union activity.

Wage increase

Of the world's top garment-producing nations, China has seen a significant rise in worker wages, which in Shanghai almost doubled between 2010 and 2016. The current minimum wage, which varies by region, is now 2190 yuan (US\$327) per month in Shanghai — merely 57% of what Asia Floor Wage considers a living wage.¹

Despite severe restrictions on union activity, worker strikes are contributing to this progress. Organisations are finding ways to empower workers — for example, China Labour Watch educates workers on labour rights and collective bargaining, and provides free advice and counselling services for them via a hotline. In the same vein, the China Labour Bulletin, which offers legal assistance for workers disputing their employers, is building a network of trade union representatives and has put together a Collective Bargaining Handbook for worker training.

¹ 'Wages and employment', China Labour Bulletin 2016. China sets its minimum wage rate by region. In Shanghai, where wages are highest, this went from 1,120 yuan in 2010 to 2,190 yuan (US\$327) in 2016. Living wage calculation based on Asian Floor Wage for China, which is US\$570.

Labour shortages in the Pearl River Delta gave the 30 million migrant workers in the region greater leverage to bargain with employers. However, there has been an increasing clampdown on union activity coinciding with government concerns about a shift in production to cheaper countries like Vietnam.

Excessive overtime

The key risk for worker rights in China is excessive overtime. Despite relatively good wage growth, the current salaries are insufficient to cover the cost of living, leading most workers to seek overtime.

To address a lack of ordering predictability from brands, factories use overtime to meet spikes in

production schedules and increased demands. So, a workday may be as long as 17 hours, and no rest day is guaranteed. Compounding this situation is the fact that overtime may only be paid yearly — meaning workers do not even see the fruit of their overtime from month to month. This gives employers significant power over workers who become more vulnerable to exploitation.

Of the audit reports we viewed in our research this year, there was a pattern of overtime rates as high as 200%, and even 300% for public holidays — a huge incentive for poor labourers to work longer hours. In some cases, especially in China, what workers earned in overtime was higher than their base wage.



Clothing factory in Dongguan, China.

HAN'S STORY: Labour rights activism in China

Independent unions are banned in China — only the All-China Federation of Trade Unions (ACFTU) is authorised to resolve disputes between employers and employees. In response to concerns that the ACFTU represents managers more often than it does workers, around 70 labour NGOs have sprung up, many out of Hong Kong.

One of these labour NGOs was the Panyu Workers' Centre (PWC). It supported workers at the Lide Shoe Factory — which produces for brands like Calvin Klein, Coach and Ralph Lauren — educating them about their rights. After over 2,500 workers went on strike they were, collectively, able to negotiate overtime, social insurance and housing contributions with factory management.

It was a great achievement, but it came at a heavy cost. In December 2015, four staff members of the PWC were arrested. Three men and one woman were eventually convicted and sentenced despite questions over the protection of their civil rights during the legal process. Director Zeng Feiyang and colleagues Tang Huanxing and Zhu Xiaomei were detained without access to lawyers before being found guilty in September 2016 of “ignoring national laws and organising mass gatherings that disturbed social order.”¹



Meng Han received a jail sentence for his labour rights activism on behalf of factory workers.

They were pressured into making false statements in court about being duped by “hostile” foreign organisations to “incite” workers into engaging in “extreme” behaviour. Former PWC staff member Meng Han was convicted the following month for “gathering crowds to disrupt public order.”² He had been detained beyond the legally permitted time, and his parents had been harassed at their

home as part of state pressure exerted against union organisers. Meng refused to assist the case against Zeng in return for a lighter sentence, insisting that PWC’s role was vital because the government and ACFTU let workers down.

1 Hong Kong Free Press, 27 September 2016.

2 Lai 2016.

Globally, India is the largest producer of cotton and has the largest land area under cotton cultivation, accounting for around 26% of cotton production and a quarter of all cotton-producing land. However, 90% of Indian cotton is genetically modified, which means that the seed costs farmers more to buy and are not reusable.¹ India is also a hotspot for human trafficking and forced labour. Much of this takes the form of bonded labour in all stages of garment production.

Fairtrade and Better Cotton Farms

Given India's prominent place in global cotton production and the prevalence of genetically modified cotton in the country, the work of Fairtrade and the Better Cotton Initiative (BCI) is of particular significance.

Fairtrade certification provides direct traceability from cotton farms through to factories because member farmers then sell to member spinners and ginners, and so on. This transparency in the supply chain, when paired with the worker empowerment that Fairtrade standards promote, is effecting real change for cotton farmers in Gujarat, Tamil Nadu, Andhra Pradesh, Orissa, and Karnataka. Fairtrade's work with Chetna Organic is directly benefitting 80,000 Indian farmers, including 6,000 cotton farmers.²

Similarly, the Better Cotton Initiative has been improving production in ten states in India since 2009. This improved the livelihoods of 270,000 BCI farmers in the 2014 harvest.³ BCI also partners ginners and spinners, strengthening traceability and standards at the inputs stage of apparel production.

Empowering cotton farmers is also good for the environment, as these communities have an interest in refining farming techniques in order to increase yields. Methods that maintain and care for the land — for example, by reducing the use of pesticides and other chemicals — mean that it will continue to serve families for generations to come.

Human trafficking and forced labour

Modern-day slavery is a reality despite being outlawed in almost all countries. The ILO estimate that 21 million are subject to forced labour, with some estimates suggesting up to 40% of victims are in India.⁴ There are even generations of workers born into bonded labour, never knowing life outside the factory. Owners create a situation whereby the worker repays a debt by performing labour — however the interest is set at extortionary rates so that the worker is essentially held as a slave, spending their lives repaying the debt.

The fact that 75% of India's rural workers and 69% of its urban workers are in the informal economy exacerbates their vulnerability. Other factors increasing the risk of slavery are embedded caste, gender, and socio-economic inequalities.⁵



Women harvesting cotton at a Chetna Organic farm.

Human trafficking and forced labour — including child prostitution and forced marriage — are illegal but enforcement is still problematic. Forced labour is outlawed in the Constitution but curiously not covered in the regulation of human trafficking under the national penal code.

India has ratified four of the International Labour Organisation's eight fundamental conventions, but is yet to ratify conventions relating to child labour, freedom of association and collective bargaining, living wage, occupational health and safety, working hours, social security or migrant workers.

1 Better Cotton Initiative; Vachharajani 2016.

2 Nath 2016.

3 Better Cotton Initiative.

4 International Labour Organization

5 Global Slavery Index.

PADMA BAI'S STORY: Transforming her community through Fairtrade

Padma Bai is challenging socio-cultural norms with her agricultural leadership. A tribal Girijan farmer, she was elected sarpanch (statutory village head) of eight villages that are home to more than 2,000 Fairtrade farmers. Padma Bai herself cultivates cotton, red gram, black gram, castor and soya on her three acres of family land in Patelguda Village in the Telangana province of India.

This extraordinary woman has used her positions of influence to transform her community and empower her people. She built cement roads in three villages and one fair weather road with dry mud using Fairtrade Premium Funds. She arranged for the government to make ponds for rainwater harvesting and made clean water available in the village school through a water pump.

She has been a member of Chetna Organics, a Fairtrade certified producer organisation in India since 2007. Her relationship with Chetna made it possible for her to secure a Rs. 30,000 loan from the Fairtrade Premiums Committee. Using these funds, Padma Bai established Exacuniverse, a equipment hiring centre.

Under the guidance of Chetna Organics, her venture invests in labour reducing tools such



Padma Bai and her husband.

as pick-axes, sickle, spades, hoes and wheelbarrows. The centre then hires out these tools to farmers in neighbouring villages. For poor farmers who cannot afford to buy their own tools the marginal rate of 2-5 rupees per day equips them with the resources they need to effectively cultivate their land.

Her husband Atram Rajeshwar works as a field assistant at Chetna Organics and he only has

good things to say about his wife's achievements. "Women can influence laws better," he says. "I'm very proud of her."

Many Australian Fairtrade companies source their products from Chetna Organic's cooperatives. Those included in our report are: Etiko, Kowtow, Liminal and Mighty Good Undies.

MADE IN ... AUSTRALIA

Australia is the fourth largest cotton exporter in the world, after India, the United States and Uzbekistan. When world cotton production dropped in 2015/16, Australian yields increased, thanks to good rainfall and improved reservoir levels.

The history of cotton in Australia

The Australian cotton industry has a long history, with native varieties dating back thousands of years and cottonseed arriving on the First Fleet. By 1830, the colony of NSW was exporting small amounts of cotton back to England.

The industrial revolution drove an increase in both the supply and demand for cotton worldwide. While the United States became the leading cotton growing nation, the Civil War in the 1860s led to a drop in American production, opening up the market to farms and gins in Australia.

However, after peaking in the 1870s, Australian cotton production dipped and by 1886, only 15 acres was being cultivated for cotton and the industry had all but disappeared. While there was some recovery in the early 1900s, it wasn't until the 1960s and 70s that dam construction enabled irrigated cotton production to revitalise the industry.

The Australian cotton industry today

Today, cotton growing and ginning occurs in over 150 rural communities throughout New South Wales and Queensland, through largely mechanised processes. Farms are family owned and operated.

Australia is now recognised as a world leader in sustainable cotton production, boasting the highest yields globally and reducing pesticide use by 95% in the last decade. Cotton Australia, the peak representative body for the farmers, co-developed the best management practices program (myBMP) and this formed the basis for the standards of the Better Cotton Initiative (BCI), of which Cotton Australia is also a member. More than 10% of Australian cotton production is Better Cotton, with this figure expected to rise annually as local fashion brands increase their commitment to sustainable sourcing.

Australian cotton is now sharing its expertise abroad because it recognises that synthetic fibres, not other cotton producers, represent the greatest competition. This year for example, Cotton Australia is partnering with BCI and the Australian Government to fund an additional 50,000 Pakistani cotton farmers into the BCI program by improving their farming practices.¹

Brands in our research purchasing Australian cotton are Kmart, H&M, Rivers, Rockmans, and Target.

1 Cotton Australia 2016, 'Thousands of Pakistani cotton growers to benefit from global cotton industry partnership'.

Image supplied by Cotton Australia.



Cotton farming regions in New South Wales and Queensland.

SIMON'S STORY: Aussie cotton farmers leading the world

Third generation farmer Simon Corish certainly knows his cotton. He's been living and working on his family's cotton farm since university, alongside his parents, two brothers, and a sister.

The family farm, "Mundine", is located on the NSW/Queensland border and like all Australian cotton farms rotates cotton with crops like wheat and chickpeas to improve soil health. The farm has full accreditation in Australian cotton's environmental program (myBMP) that includes 50 standards on worker health and safety, and is part of the global BCI.

"Sustainability and the fair treatment of workers is not something we add on to our farming system, it's embedded in everything we do. BCI is recognising cotton farmers for doing the right thing, and we're proud to be involved in it," he said.

These days, Simon plays more of a management role in the family business, overseeing operations, making decisions and managing teams of workers.

"We use a lot of science and technology to help make good decisions. Satellite imagery helps us schedule cotton irrigations and fertiliser, we monitor pest insects daily and review data from in-field moisture probes to work out exactly what the crop needs as the season progresses," Simon said.



Simon Corish and his family on their cotton farm.

Simon's passion for cotton has grown alongside his industry commitment. He is the current Cotton Australia Chairman and sits on the BCI board with some of the world's biggest brands and NGOs.

As for the future, much of the focus will remain on making an already efficient farming system even better.

"Cotton is a dynamic industry here in Australia where farmers are prepared to share information with each another to help us all improve. We're in the process of converting half the farm to more water efficient systems like drip and bankless irrigation and we're trialling drones to manage our cotton with more precision."



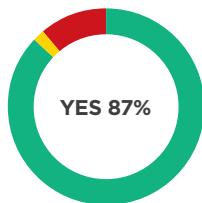
Policies

This section evaluates the policies that companies have in place to address the risk of worker exploitation in supplier and subcontracted factories. It also checks their involvement in multi-stakeholder initiatives and their efforts to address their responsibility to manage the pressure placed on suppliers to fill orders. Most companies have now adopted policies which set the minimum working conditions they expect of their suppliers and factories. Policies are the first step to creating a robust supply chain management system.

POLICIES

INDUSTRY OVERVIEW

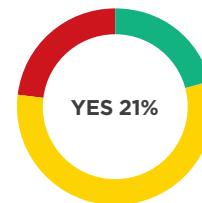
Does the company have a code that addresses the ILO Four Fundamental Principles and Rights at Work?



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

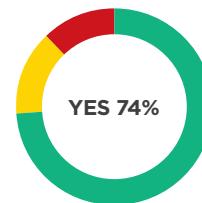
Among the apparel companies we assessed, 87% have Codes of Conduct that include at least these basic principles. A further 2% have Codes of Conduct or other ethical sourcing statements which include some of these basic principles.

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



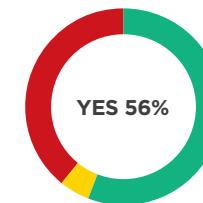
By stating that their code applies to multiple levels of their supply chain, companies are accepting that the sphere of their responsibility is not limited to their final stage manufacturers. We know that it is the deeper, more removed levels of the supply chain which are at greatest risk of worker exploitation, which makes efforts to ensure that these suppliers operate in line with code standards critical. 21% of companies reported applying their Code of Conduct to multiple levels of their supply chain, including to the level of raw material production while a further 56% reported making efforts to insist standards within their Code of Conduct are adhered to as far as their fabric production suppliers.

Does the code prohibit use of regular and excessive overtime?



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

Does the company participate in any multi-stakeholder initiatives?



Multi-stakeholder initiatives bring together a diverse range of actors to solve complex problems that are hard for any single stakeholder to resolve independently. They can include input and resources from unions, civil society organisations, companies, government and research bodies. Many of these initiatives, such as the Fair Labor Association, Fairtrade, the Ethical Trading Initiative, United Nations Global Compact, Better Work Program, Better Cotton Initiative or Ethical Clothing Australia have shown great promise in improving working conditions. A total of 56% of companies reported active participation in a multi-stakeholder initiative.

Kathmandu: Mandatory Reporting of Child & Forced Labour

In January 2017, Kathmandu approved a comprehensive Mandatory Reporting of Child & Forced Labour Policy. While most companies prohibit the use of child and forced labour and some have taken steps to reduce the risk and prevent it happening, Kathmandu has adopted a “hope for the best but always plan for the worst” approach. Rather than punishing factories where exploitation is identified, the policy encourages collaborative action between suppliers, local law enforcement and NGOs to handle these incidents if and when they occur.

By setting out a clear process for reporting child and forced labour, Kathmandu ensures that identified cases are appropriately escalated and effectively investigated, and the employee is protected and provided for. The thorough definitions in the policy make it difficult for those who suspect child or forced labour to turn a blind eye, recognising that both child and forced labour are real risks in the apparel supply chain. Kathmandu believes that this reporting policy reflects the brand’s values of integrity and transparency. Drawing from international conventions and existing policies from similar companies, Kathmandu is now sharing their own industry-leading policy with other brands.

adidas: Modern Slavery Outreach

The adidas Group has completed a risk-based assessment of its supply chain and identified

potential risks of modern slavery. Based on these findings, adidas has developed a three-pronged Modern Slavery Outreach Programme, a strategy focusing on:

- (1) rolling out training and awareness raising at inputs facilities, where brands traditionally have less oversight and control over child labour and trafficking prevention, and remediation;
- (2) deepening its engagement in multi-stakeholder initiatives such as the Fair Labor Association (FLA) and the International Labour Organization (ILO) to collaboratively address issues in high-risk leather and rubber producing regions; and,
- (3) addressing risks related to cotton farming and the Syrian refugee crisis in Turkey.

Although Turkey is one of its smaller sourcing countries, adidas has an active team on the ground and is engaged in multi-stakeholder initiatives there. In response to the influx of Syrian refugees, many of whom live outside official refugee camps, adidas has teamed up with the Turkish government, UNHCR, the FLA, local NGOs, and other brands to protect this vulnerable group. Worker-centred initiatives include obtaining work permits for refugees so that they can access important entitlements, an anonymous hotline serving both local Turkish-speaking workers and Arabic-speaking Syrian workers, as well as booklets outlining employment rights for Turkish and Syrian workers. Other programs focus on suppliers, training them in the regulations around hiring refugees and strengthening risk management in this area.



An awareness raising poster, created in Arabic and Turkish, by adidas in conjunction with UNHCR and the FLA. It reads, in Turkish, “Children should go to school. Not work!”

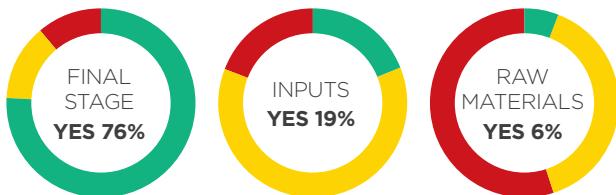
5 Knowing Suppliers

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

KNOWING SUPPLIERS

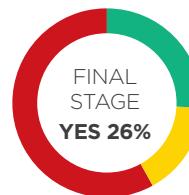
INDUSTRY OVERVIEW

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



Tracing the location of suppliers is an important way in which a company can begin to take responsibility for working conditions in its supply chain. It's almost impossible for companies to know that suppliers are adhering to code standards if they do not know who their suppliers are. 76% of companies have traced all of their cut-make-trim factories, but the level of traceability tapers for the more removed parts of the supply chain, particularly inputs and raw materials suppliers. It is in these parts of the supply chain that sit outside of the purview of companies that the risk of worker exploitation is both higher and least likely to be remedied. The six companies that have traced their entire cotton supply chain are all Fairtrade certified and have specifically set up their business model around a certification system which enables them to do so.

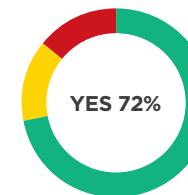
Is there a public list of suppliers?



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

Transparency deepens the credibility of claims companies make about their supply chain systems and engenders trust. Of the companies assessed, 26% (up from 16% last year) publish a full list of their cut-make-trim suppliers along with addresses. A further 16% received partial credit for either disclosing a portion of their supplier list, or for disclosing it more indirectly through a channel such as the Bangladesh Accord or Alliance for Worker Safety in Bangladesh.

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



It is common for direct suppliers to subcontract orders out to other facilities. Where these subcontractors are unauthorised or unmonitored the possibility that workers will be exploited increases substantially. This remains one of the greatest areas of risk in the apparel supply chain. In acknowledgement of this, 72% of companies assessed have taken some steps at the final production stage to ensure that there is either no subcontracting, or that all subcontracted production adheres to the standards laid out in their code of conduct.

KNOWING SUPPLIERS

BEST PRACTICE HIGHLIGHTS

Patagonia: Interactive supply chain map

Our 2017 research found that an increasing number of companies are publishing their sourcing countries and supplier lists. This is commonly done via a link to a table of suppliers in the corporate responsibility section of a company's website. However, some brands have gone a step further to make this data more consumer-friendly.

Patagonia's supplier list is a case in point. Its website contains a page with an interactive map called The Footprint Chronicles. Factories, textile mills, and farms are colour-coded, and their locations are marked with pins. Clicking on a pin brings up a box with facility details, including name and address, the number of workers, gender breakdown, the type of product manufactured at the facility, a photo, and a highlight on an initiative to improve worker conditions there. Additionally,

each item in Patagonia's online catalogue includes information on the facilities used to manufacture the particular product.

While the public availability of supplier details is an important demonstration of a company's transparency, improving the accessibility of this information to everyday consumers shows an even stronger commitment to transparency. We applaud the companies that have made it easier for consumers to visualise and understand the supply chain.

Other brands with helpful interactive maps include Gap, Inditex, Nike and Nudie.

Growth of the Better Cotton Initiative

Our 2016 report described the impact that the BCI cotton is having in helping farmers improve their

yields (and resulting profits) and providing brands with raw materials visibility previously thought impossible. BCI is fundamentally collaborative in nature — besides cotton farmers, it works with ginners and spinners, brands and traders, and NGOs known as "implementing partners" who conduct second-party audits. While the focus is on the farms, BCI's activity spans the supply chain.

BCI's pioneering brand members are increasing their sourcing of BCI year on year — adidas is aiming for 100% by 2018, Nike 100% by 2020, and Levi's 100% sustainable cotton by 2020 (95% BCI and 5% organic or recycled cotton). H&M has a target of 100% Better Cotton or other sustainable sources, such as recycled or organic cotton, by 2020. In 2014, Better Cotton made up 8.8% of global cotton production; by 2020, BCI hopes to cover farmers producing 30% of the market.

Membership continues to rise. In February 2017, there were 1001 BCI members in 49 countries, including 66 brands and retailers, 861 manufacturers and suppliers (including fabric mills and spinners), 31 producer organisations and 33 civil society members.

Of the companies included in our 2017 research, the following are also BCI members: ASOS, Cotton On Group, Country Road Group, David Jones, Esprit, Gap, Inditex, Kathmandu, Tommy Hilfiger (PVH), VF Corporation, and Next as a learner (not yet sourcing Better Cotton).

Photo credit: Asim Hafeez / WWF UK.



Pakistani cotton harvester.



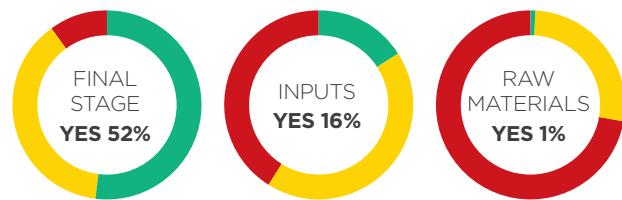
Auditing & Supplier Relationships

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

AUDITING & SUPPLIER RELATIONSHIPS

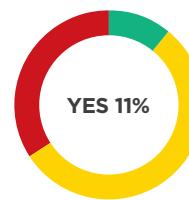
INDUSTRY OVERVIEW

Does the company audit 100% of its traced facilities over a two-year period?
(partial = some monitored)



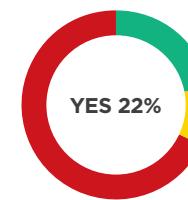
Once a company has traced the location of suppliers, audits are a useful tool to better understand the working conditions in their facilities, and to identify instances of worker exploitation. There is great diversity in the quality of audits and their capacity to effectively capture a true representation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

Does the company audit at least 75% of its traced final stage facilities with unannounced visits, offsite worker interviews or anonymous worker surveys? (partial = some)



Unannounced audits gain a far more accurate picture of everyday operations in factories because factory managers and others in positions of influence have less warning time to hide abuses. We also know workers are more likely to feel freer to express concerns about their workplace when they are interviewed offsite and away from factory management, or surveyed anonymously. These three measures significantly affect the quality of audits conducted. Only 11% of companies reported auditing a majority of cut-make-trim facilities with either unannounced visits, offsite worker interviews or anonymous worker surveys each year.

Does the company share broad auditing results publicly?

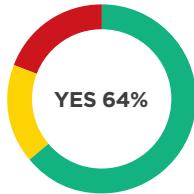


While most companies trace and audit their suppliers to ensure that basic working conditions are adhered to, it takes a particularly mature approach to transparency and social responsibility to admit that suppliers do not always meet standards set for them. Consequently, only 22% of companies shared data about their broad auditing results with the general public. Baptist World Aid believes that admissions of noncompliance do not represent failures in social compliance, but rather an important step towards greater transparency and accountability that will drive improved working conditions. It is the companies that are unable to identify or admit to concerns in their supply chain which are most hampered from improving.

AUDITING & SUPPLIER RELATIONSHIPS

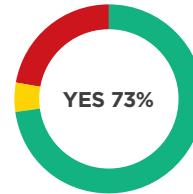
INDUSTRY OVERVIEW

Does the company have a safety incident reporting and investigation procedure?



The Rana Plaza tragedy highlighted the importance of workers being able to effectively raise safety concerns. Initiatives such as the Accord and the Alliance in Bangladesh have provided alternative avenues for these issues to be raised in that one country, but safety remains a real problem for factories globally. Of the companies assessed, 64% checked that workers have access to a procedure to report safety incidents and to have them further investigated. Some checked that these are present within the factory, while others took the added step of offering an additional avenue through which workers could raise unresolved concerns.

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



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

AUDITING & SUPPLIER RELATIONSHIPS

BEST PRACTICE HIGHLIGHTS

Hanesbrands, Kookai and Rip Curl: brand-owned factories

Unlike most retailers who source through CMT suppliers and agents, Australian-based companies Kookai and Rip Curl operate their own facilities abroad. In addition to the leverage and control over working conditions and a greater ability to ensure compliance with the company code of conduct, owning the factories that produce their garments means that these brands are directly contributing to the local community. Facility ownership closely

Photo credit: Rip Curl



The factory floor of Rip Curl's wetsuit facility in Chiang Mai, Thailand.

connects Kookai and Rip Curl to the way their business impacts those in their supply chain.

Kookai Asia-Pacific's founder, Rob Cromb, has a personal connection with Fiji, where his company owns two final stage facilities accounting for 90% of production. His decision in 1997 to source from the country where he grew up means that his company is investing in training and upskilling local workers. Currently those factories employ a thousand Fijians. Kookai's charity, Catalyst, is engaged in other community development projects there, including the provision of university scholarships for workers' children and other children in poor communities.

Rip Curl's wetsuit production facility provides jobs for 695 local people in Chiang Mai, Thailand. This makes the company a major employer in the area. Local staff benefit from a safe, clean and stable working environment at a modern facility, and receive employee entitlements and benefits. This in turn has flow-on benefits for their families and the whole Chiang Mai community.

On a larger scale, US company Hanesbrands has for decades operated its own factories across Asia and Central America and in the Jordan. Currently 80-85% of production is from company-owned facilities. These are vertically integrated, meaning Hanesbrands controls its supply chain from inputs through to final stage production. Owning its own facilities allows Hanesbrands to invest in employees and their communities, which in turn strengthens the company's engagement with civil society and international unions.

Lululemon: Foreign Migrant Worker Standard

Initially implemented to target a vulnerable demographic in Taiwan, Lululemon's Foreign Migrant Worker Standard (FMW Standard) has been rolled out across all assessed facilities that rely on migrant labour. After consulting with its Taiwanese suppliers — as well as the national workforce development agency and foreign migrant worker office, and other brands and industries — the company developed its FMW Standard.

Lululemon is collaborating with vendors to implement the standard, which requires vendors to "develop a written corporate policy for the hiring and employment of Foreign Migrant Workers". The FMW Standard encompasses recruitment, the duration of the worker's employment, and when their employment ends. In this way, Lululemon addresses a number of ethical sourcing and worker conditions issues covered in our research: for example, the standard prohibits the retention of identification documents by the facility, ensures foreign migrant workers are trained in their rights, and gives the brand greater visibility on recruitment fees.

Lululemon is one of several companies in our research investing in supplier relationships in order to improve worker rights, especially those of foreign workers. The adidas Group, for example, has also conducted targeted training to inputs suppliers in Taiwan, focusing on migrant labour best practices.

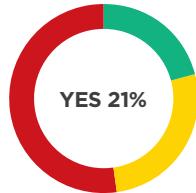
Worker Empowerment

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

WORKER EMPOWERMENT

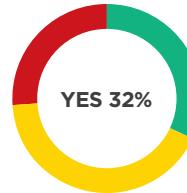
INDUSTRY OVERVIEW

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



Freedom of association and the right of collective bargaining are one of the ILO's Four Fundamental Principles and Rights at Work. Effective recognition of these rights empowers workers to negotiate decent working conditions and fairer wages. Disappointingly, too few facilities in the apparel industry actually have an effective democratically elected trade union. This is a practical limit on the expression of the right to join or not join a worker representative body. Furthermore, 75% of assessed companies source from China, a country well known to have legal restrictions on freedom of association. A fifth of companies (21%, up from 11% last year) reported tracking a union presence in any of their facilities but this stands in sharp contrast to the 87% of companies whose policies uphold freedom of association and collective bargaining. It appears that while audits routinely ask workers if they feel they are free to express this right, companies are less robust in checking for the presence of avenues for workers to do so in practice.

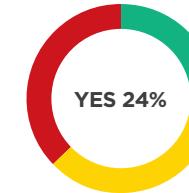
Does the company have a functioning grievance mechanism at final stage facilities?



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

It is important that workers are additionally provided with an avenue to express their concerns to a third party, particularly since the factory may be responsible for the abuse and may have already refused to rectify it. An alternative avenue for raising grievance is also necessary because audits only capture a snapshot of what is occurring in factories. Of companies assessed, 75% reported providing workers in a portion of their supply chain with access to some form of external grievance mechanism.

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



Documented cases of child and forced labour have been associated with every stage of the apparel supply chain. It is important that brands have a remediation plan in place so that they are in a good position to respond to the risk of these worst forms of abuse occurring in their supply chain. If child labour is found, we hope that brands are prepared to find a way to remove them from the situation, provide for the child's education and replace the lost income to the family. If forced labour is found, brands should facilitate the individual's reintegration into the labour market and transition to decent work with compensation for any unpaid wages. Of the companies assessed, 24% reported having systems or policies in place to rehabilitate child or forced labourers if they were discovered in their cut-make-trim facilities, with a further 39% reporting some less formal commitments to action in this area.

WORKER EMPOWERMENT

BEST PRACTICE HIGHLIGHTS

ACT: Action, Collaboration, Transformation

A joint effort between brands from around the world and IndustriALL Global Union, ACT focuses on collective bargaining as a way to improve wages for garment workers. It is a collaborative approach to the issue of living wages, which Baptist World Aid considers fundamental to the improvement of worker conditions.

While many companies — particularly small brands — struggle to push for wage increases when their market share is small and they do not have sufficient leverage with their suppliers, ACT combines the influence of 17 brands (at the time of publication) as well as a global union and factory management and workers. In this way, wages can be agreed on at a national, industry-wide level rather than on a case-by-case basis.

With a former International Labour Organization (ILO) heavyweight assuming the leadership of ACT later this year, the foundation hopes to get onto the G20 agenda. In addition to its work on collective bargaining, ACT is also developing responsible purchasing standards for members to improve consistency for suppliers in dealing with multiple brands.

The collective bargaining agreements formulated under this initiative are legally binding and the first country program has commenced in Cambodia. We're looking forward to seeing how ACT develops in the years to come, and the concrete wins that this will create for garment workers in developing countries.

ACT members included in this report are ASOS, Coles, Esprit, H&M, Inditex, Kmart, Next, Target, and Arcadia Group.

Cue and Ethical Clothing Australia

“While most clothing purchased by Australians is now manufactured offshore, Cue has made a deliberate business decision to source its cut-make-trim production right here in Australia.

According to the company, “shorter lead times, smaller runs, maintaining a very high standard of quality and the ability to react quickly to fashion trends are just some of the benefits of manufacturing locally. The ongoing growth and expansion of our brand is proof that a trade-off between ethical production and profitability need not exist.”

The Australian textile, clothing and footwear industry today relies on an outsourcing model and in many cases involves the engagement of homeworkers. Homeworkers, despite Australian law, are particularly vulnerable because of the informal nature of their work structure. Many are workers from migrant backgrounds with a limited understanding of their labour rights.

This is where Ethical Clothing Australia (ECA), an accreditation body funded by the Victorian government, plays an important role. This multi-stakeholder organisation administers the voluntary Homewoker Code of Practice, designed to protect Australian garment workers. ECA ensures a legally compliant local supply chain, which

helps companies manage risk. As part of the accreditation process, ECA connects brands like Cue to the Textile Clothing and Footwear Union of Australia to protect both factory workers and homeworkers.

Cue believes that “an ethical local supply chain isn’t just about doing the right thing — it’s also about supporting an industry and its workers so that Cue can remain onshore for many years to come.”

Other ECA-accredited companies in our report are: Anthea Crawford, JETS and R.M. Williams.



Photo credit: Cue Clothing Co.

Cue staff preparing a garment design.



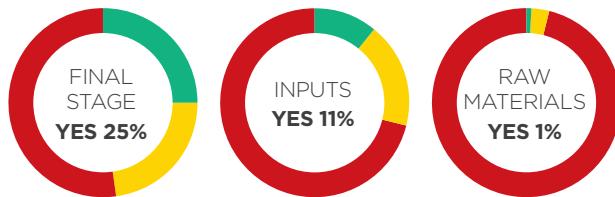
Living Wage

This section explores the importance of paying a Living Wage, examining the state of the industry, the potential cost of implementation and the status of companies in working to improve wages.

LIVING WAGE

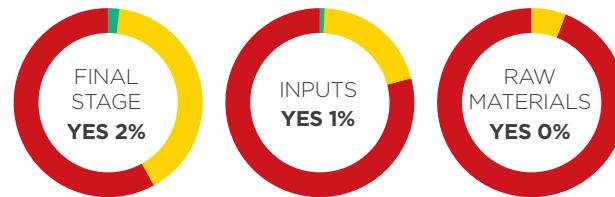
INDUSTRY OVERVIEW

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



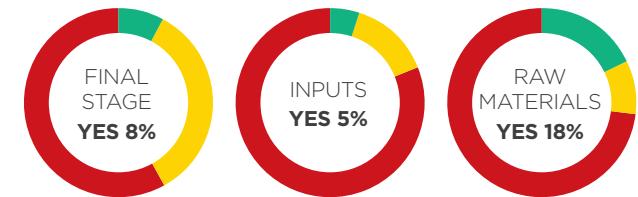
According to many companies, one of the most significant impediments towards paying garment industry workers a living wage is the absence of global consensus on how to define and calculate a living wage. We have given credit to brands for adopting a methodology for themselves in the particular regions their supply chain operates in, or for participating in a multi-stakeholder initiative towards this end. Collecting current wage data and having a living wage benchmark is a critical first step in understanding the 'wage gap' and directing efforts and investments to improve wages. It is encouraging to see that 48% of companies are taking some steps towards adopting a methodology for at least some portion of their supply chain.

What percentage of companies pay a living wage? (partial credit = payments substantially above minimum wages)



42% of companies were able to show that they either paid a living wage to a portion of their final stage workers, or that they pay some of them substantially above the legal minimum wage. The ultimate goal is for all workers to be paid a living wage, but these efforts to pay above the legal minimum are also welcomed until that goal is reached.

What percentage of facilities have projects to improve wages? (partial = some)



Until the apparel industry widely pays workers a living wage, it is important that companies take active steps to improve worker incomes above the legal minimum in low wage countries where we know workers live in poverty. Some of these projects involve active engagement with unions and other worker representatives to negotiate collective bargaining agreements addressing wages workers agree to. Others involve efforts to continually improve wages above a benchmark, such as the legal minimum wage. Initiatives such as Fairtrade and the Better Cotton Initiative increase the incomes of cotton farmers by making terms of trade fairer, enhancing yields through improved farming practices, and facilitating access to markets. These initiatives account for the relatively high number of companies investing in projects at a raw materials level.

LIVING WAGE

BEST PRACTICE HIGHLIGHTS

The payment of a living wage is perhaps the most important element in seeing the rights of workers upheld, with low wages being the most consistent issue raised by garment workers themselves. While legal minimum wages remain below poverty levels, an important first step to achieving living wages is knowing what the ‘living wage level’ is in each region a company sources from.

A living wage is one that allows for a worker to cover their family’s basic needs and have some discretionary income; establishing a robust estimate will involve multi-stakeholder consultation.

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

Kmart Australia benchmarking in Bangladesh

To better understand the challenges and opportunities associated with achieving a living wage for factory workers, in 2015 Kmart commissioned an independent study by PwC of three suppliers in Bangladesh.

The study involved benchmark assessment of the wages paid by suppliers against the minimum wage and a number of living wage benchmarks, as well as interviews with suppliers to understand their perspectives.

Building on the findings of the study, Kmart is now piloting a wage monitoring system in Bangladesh to enhance transparency and enable tracking of wage movements over time.

Kmart believes that measuring wages is just a starting point and that achieving sustainable improvements in wages — and ultimately a living wage — requires active collaboration with other brands, retailers and manufacturers, and partnerships with trade unions and governments. To pursue this, in 2015 Kmart joined an initiative called ‘Action, Collaboration, Transformation’ (ACT), featured on page 43 of this report.

Kmart is a fine example of how committing to a strategy on living wages is not the exclusive ambition of companies using Fairtrade or luxury brands charging a premium on their products — it’s also a realistic aim for high volume, low cost operators. We commend Kmart’s efforts in starting to develop a strategy in relation to living wage and look forward to seeing its progress.

Other companies making progress on living wage

While only Mighty Good Undies was awarded full credit for paying all their final stage production workers a living wage, 44 companies in total received some credit at this stage of production. Of these, ten were able to show that they paid a majority of their workers a living wage. We would like to applaud the following brands for this achievement: Mighty Good Undies (Fairtrade-certified), Anthea Crawford (ECA-accredited),

Etiko (Fairtrade), Liminal (Fairtrade), Cue (ECA), Hanesbrands, Jets (ECA), Kowtow (Fairtrade), Nudie Jeans, R.M. Williams (ECA).

At the inputs stage, only Freeset paid 100% of its workers a living wage, but 20 companies were also awarded partial credit here. Other than Freeset, only Fairtrade-certified companies — Etiko, Liminal, Mighty Good Undies and Kowtow — were able to show that they paid a majority of their workers a living wage at this stage of production.

While Fairtrade-certified and ECA-accredited companies performed best on the payment of living wages, we found that a mix of budget, mid-range and high-end companies were paying at least some portion of their supply chain fairer wages. American Apparel, APG & Co, Ben Sherman, Big W, Coles, Cotton On Group, Country Road Group, David Jones, Ezibuy, Factory X, Forever New, Fruit of the Loom, Glassons, Gorman, H&M, Inditex, Industries, Jeanswest, Just Group, Karen Walker, Kathmandu, Kmart Australia, Kookai, Macpac, Pacific Brands, Patagonia, Puma, RREPP, Simon de Winter, Specialty Fashion Group, Sussan Group, Target Australia, Tree of Life, VF Corporation and Zimmermann all deserve a mention here.

The number and diversity of companies making efforts in this area shows that committing to at least a strategy on living wages is not the exclusive ambition of companies using Fairtrade or luxury brands charging a premium on their products — it’s also a realistic aim for high volume, low-cost operators.



Brand Index

This section lists grades for the 330 brands assessed in this report. While our grades most often apply to single companies, many companies hold multiple brands.

BRAND INDEX

GRADE BY COMPANY

A-F

Parent Company	Brand	Grade
Abercrombie & Fitch*	Abercrombie & Fitch*	D+
Abercrombie & Fitch*	abercrombie kids*	D+
Abercrombie & Fitch*	Hollister*	D+
adidas Group	adidas	A-
adidas Group	Reebok	A-
adidas Group	TaylorMade	A-
Aldi	Aldi	C+
Ally Fashion*	Ally*	F
American Apparel	American Apparel	B
Anthea Crawford*	Anthea Crawford*	C+
APG & Co	JAG	A-
APG & Co	SABA	A-
APG & Co	Sportscraft	A-
Arcadia Group	Burton Menswear	C+
Arcadia Group	Dorothy Perkins	C+
Arcadia Group	Evans	C+
Arcadia Group	Miss Selfridge	C+
Arcadia Group	Topman	C+
Arcadia Group	Topshop	C+
Arcadia Group	Wallis	C+
AS Colour	AS Colour	B-
ASOS	ASOS	B-
Bardot	Bardot	C-
Bardot	Bardot Junior	C-
Ben Sherman Australia	Ben Sherman	C-
Best & Less	Best & Less	C
Betts*	Betts*	F
Betts*	Betts Kids*	F
Betts*	Airflex*	F

Parent Company	Brand	Grade
Big W	Avella	C+
Big W	Dymples	C+
Big W	Emerson	C+
Big W	Guy Leech	C+
Big W	Lee Cooper	C+
Big W	Michelle Bridges	C+
Big W	Peter Morrissey	C+
Billabong	Billabong	C+
Billabong	Element	C+
Billabong	Honolua Surf Co.	C+
Billabong	Kustom	C+
Billabong	RVCA	C+
Billabong	Tigerlily	C+
Billabong	Xcel	C+
Bloch*	Bloch*	F
Blue Illusion	Blue Illusion	C-
Boden	Boden	B-
Brand Collective	Elka Collective	C
Brand Collective	Elwood	C
Brand Collective	Mossimo	C
Clarks	Clarks	C+
Coles	Coles	C+
Coles	Mix Apparel	C+
Corporate Apparel Group*	Ron Bennett*	F
Corporate Apparel Group*	SEW253*	F
Corporate Apparel Group*	Get Formal*	F
Cotton On Group	Cotton On	A-
Cotton On Group	Cotton On Body	A-
Cotton On Group	Cotton On Kids	A-

Parent Company	Brand	Grade
Cotton On Group	factorie	A-
Cotton On Group	Rubi	A-
Cotton On Group	Supré	A-
Country Road Group	Country Road	B+
Country Road Group	Mimco	B+
Country Road Group	Trenery	B+
Country Road Group	Witchery	B+
Cue Clothing Co	Cue	B-
Cue Clothing Co	Veronika Maine	B-
David Jones	Agenda	B+
David Jones	Alta Linea	B+
David Jones	David Jones	B+
David Jones	Milana	B+
David Jones	St James	B+
David Jones	The Foundry	B+
Decjuba*	Decjuba*	F
Designworks	Sista	B-
Designworks	Mooks	B-
Designworks	Republic	B-
Designworks	Dunlop	B-
Designworks	Everlast	B-
Designworks	Slazenger	B-
Esprit	Esprit	B+
Etiko	Etiko	A+
EziBuy	Capture	C+
EziBuy	Emerge	C+
EziBuy	Urban	C+
EziBuy	EziBuy	C+
EziBuy	Grace Hill	C+

* = non-responsive companies

BRAND INDEX

GRADE BY COMPANY

F-M

Parent Company	Brand	Grade
EziBuy	Sara	C+
Factory X	Dangerfield	C
Factory X	L'urv	C
Factory X	Princess Highway	C
Factory X	Jack London	C
Factory X	Alannah Hill	C
Factory X	Revival	C
Farmers*	Farmers*	F
Fast Future Brands	MIRROU	D+
Fast Future Brands	TEMPT	D+
Fast Future Brands	Valleygirl	D+
Forever 21	Forever 21	D+
Forever New	Forever New	B
Freeset	Freeset	A-
Fruit of the Loom	Fruit of the Loom	B-
Fruit of the Loom	Russell Brands	B-
Fruit of the Loom	Spalding	B-
Fruit of the Loom	Vanity Fair	B-
Fusion Retail Brands	Colorado	C-
Fusion Retail Brands	Diana Ferrari	C-
Fusion Retail Brands	Mathers	C-
Fusion Retail Brands	Williams	C-
Gap Inc.	Athleta	B-
Gap Inc.	Banana Republic	B-
Gap Inc.	Gap	B-
Gap Inc.	INTERMIX	B-
Gap Inc.	Old Navy	B-
Gazal*	Bisley*	D-
Gazal*	Gazal*	D-

Parent Company	Brand	Grade
General Pants	General Pants Co Basics	C
General Pants	General Pants	C
Glassons	Glassons	B-
Gorman	Gorman	C+
Grosby	Grosby	C
Grosby	Volley	C
H&M	& Other Stories	B+
H&M	Cheap Monday	B+
H&M	COS	B+
H&M	H&M	B+
H&M	Monki	B+
H&M	Weekday	B+
Hanesbrands Inc.	Bali	B+
Hanesbrands Inc.	Barely There	B+
Hanesbrands Inc.	C9 by Champion	B+
Hanesbrands Inc.	Champion	B+
Hanesbrands Inc.	DIM	B+
Hanesbrands Inc.	Gear for Sports	B+
Hanesbrands Inc.	Hanes	B+
Hanesbrands Inc.	Knights Apparel	B+
Hanesbrands Inc.	Maidenform	B+
Hanesbrands Inc.	Playtex	B+
Hanesbrands Inc.	Wonderbra	B+
House of Quirky	Evil Twin	C-
House of Quirky	MINKPINK	C-
House of Quirky	Somedays Lovin'	C-
House of Quirky	Staple the Label	C-
Hush Puppies	Hush Puppies	C+
Icebreaker*	Icebreaker*	D-

Parent Company	Brand	Grade
Inditex	Bershka	A
Inditex	Massimo Dutti	A
Inditex	Oysho	A
Inditex	Pull&Bear	A
Inditex	Stradivarius	A
Inditex	Uterqüe	A
Inditex	Zara	A
Inditex	Zara Home	A
Industrie	ABCD Indie	B+
Industrie	Indie	B+
Industrie	Indie & Co	B+
Industrie	Industrie	B+
Jeanswest	Jeanswest	B+
Jets	Jets	B
Julius Marlow	Julius Marlow	C+
Just Group	Dotti	C+
Just Group	Jacqui E	C+
Just Group	Jay Jays	C+
Just Group	Just Jeans	C+
Just Group	Peter Alexander	C+
Just Group	Portmans	C+
Karen Walker	Karen Walker	B+
Kathmandu	Kathmandu	B+
Kmart	Kmart	B
Kookai	Kookai	B-
Kowtow	Kowtow	A
L Brands*	Henri Bendel*	D+
L Brands*	La Senza*	D+
L Brands*	Pink*	D+

* = non-responsive companies

BRAND INDEX

GRADE BY COMPANY

M-T

Parent Company	Brand	Grade
L Brands*	Victoria's Secret*	D+
Lacoste	Lacoste	C+
Levi Strauss & Co.	Dockers	B+
Levi Strauss & Co.	Levi's	B+
Liminal Apparel	Liminal Apparel	A
Lorna Jane	Lorna Jane	C+
Lowes	Beare & Ley	D+
Lowes	Lowes	D+
Lululemon Athletica	Lululemon	B+
Macpac	Macpac	B-
Max	Max	C
Mighty Good Undies	Audrey Blue	A+
Mighty Good Undies	Mighty Good Undies	A+
Myer	Basque	C+
Myer	Blaq	C+
Myer	Milkshake	C+
Myer	Miss Shop	C+
Myer	Piper	C+
Myer	Regatta	C+
Myer	Reserve	C+
Myer	Sass & Bide	C+
Myer	Sprout	C+
New Balance	New Balance	B-
Next	Next	C+
Next	Lipsy	C+
Nike*	Converse*	C+
Nike*	Hurley*	C+
Nike*	Nike*	C+
Noni B Group	Noni B	C

Parent Company	Brand	Grade
Noni B Group	Rockmans	C
Noni B Group	W. Lane	C
Noni B Group	beme	C
Noni B Group	Table Eight	C
Noni B Group	Liz Jordan	C
Nudie Jeans	Nudie Jeans	A-
Oroton Group	Oroton	B-
Oxford*	Oxford*	F
Pacific Brands	Actil	A-
Pacific Brands	Berlei	A-
Pacific Brands	Bonds	A-
Pacific Brands	Crestell	A-
Pacific Brands	Dunlopillo	A-
Pacific Brands	Explorer	A-
Pacific Brands	Fairydown	A-
Pacific Brands	Hestia	A-
Pacific Brands	Holeproof	A-
Pacific Brands	Jockey	A-
Pacific Brands	Platinum	A-
Pacific Brands	Razzamatazz	A-
Pacific Brands	Red Robin	A-
Pacific Brands	Rio	A-
Pacific Brands	Sheer Relief	A-
Pacific Brands	Sheridan	A-
Pacific Brands	Tontine	A-
Pacific Brands	Voodoo	A-
Patagonia	Patagonia	A
Pavement United Brands*	Asphalt*	D-
Pavement United Brands*	Coco Beach*	D-

Parent Company	Brand	Grade
Pavement United Brands*	Gum*	D-
Pavement United Brands*	Lemonade*	D-
Pavement United Brands*	Pavement*	D-
Pavement United Brands*	Pom Pom*	D-
Pavement United Brands*	Scram*	D-
Pavement United Brands*	Wax Bros*	D-
Pavement United Brands*	Zom-B*	D-
Puma	Cobra Golf	B-
Puma	Puma	B-
PVH Corp	ARROW	C+
PVH Corp	Calvin Klein	C+
PVH Corp	IZOD	C+
PVH Corp	Olga	C+
PVH Corp	Speedo	C+
PVH Corp	Tommy Hilfiger	C+
PVH Corp	Van Heusen	C+
PVH Corp	Warner's	C+
Quiksilver	DC	C
Quiksilver	Quiksilver	C
Quiksilver	Roxy	C
R.M. Williams	R.M. Williams	B+
Retail Apparel Group	Connor	C+
Retail Apparel Group	Johnny Bigg	C+
Retail Apparel Group	Rockwear	C+
Retail Apparel Group	Tarocash	C+
Retail Apparel Group	yd.	C+
Rip Curl	Rip Curl	C+
Roger David*	Roger David*	F
RREPP	RREPP	A+

* = non-responsive companies

BRAND INDEX

GRADE BY COMPANY

T-Z

Parent Company	Brand	Grade
Seafolly	Seafolly	B-
Seed Heritage	Seed Heritage	C-
Simon de Winter	Darn Tough	C+
Simon de Winter	Fine Lines	C+
Simon de Winter	Kayser	C+
Simon de Winter	Simon de Winter	C+
Specialty Fashion Group	Autograph	B
Specialty Fashion Group	City Chic	B
Specialty Fashion Group	Crossroads	B
Specialty Fashion Group	Katies	B
Specialty Fashion Group	Millers	B
Specialty Fashion Group	Rivers	B
Sussan Group	Sportsgirl	B
Sussan Group	Sussan	B
Sussan Group	Suzanne Grae	B
Target Australia	Target	B-
Target Australia	Wonder Comfort	B-
Target Australia	Lily Loves	B-
Target Australia	Superflex DNM	B-
Target Australia	Active	B-
Target Australia	Tutu's & Tambourines	B-
Target Australia	Jacob & Co	B-
Target Australia	Future You	B-
Target Australia	Belle Curve	B-
Target Australia	Mr Big	B-
Target Australia	MAXX	B-
Target Australia	Dannii Minogue	B-
The PAS Group	Yarra Trail	C+
The PAS Group	Marco Polo	C+

Parent Company	Brand	Grade
The PAS Group	Breakaway	C+
The PAS Group	Black Pepper	C+
The PAS Group	Equus	C+
The PAS Group	Review	C+
The PAS Group	Yvonne Black	C+
The PAS Group	Extra Pepper	C+
The Warehouse*	The Warehouse*	C
Tree of Life	Tree of Life	C+
UNIQLO	UNIQLO	B
VF Corporation	7 For All Mankind	B-
VF Corporation	Bulwark	B-
VF Corporation	Eagle Creek	B-
VF Corporation	Eastpak	B-
VF Corporation	Ella Moss	B-
VF Corporation	Horace Small	B-
VF Corporation	Jansport	B-
VF Corporation	Kipling	B-
VF Corporation	LEE	B-
VF Corporation	Lucy	B-
VF Corporation	Majestic	B-
VF Corporation	Napapijri	B-
VF Corporation	Nautica	B-
VF Corporation	Red Kap	B-
VF Corporation	Reef	B-
VF Corporation	Riders by LEE	B-
VF Corporation	Rock & Republic	B-
VF Corporation	Rustler	B-
VF Corporation	Smartwool	B-

Parent Company	Brand	Grade
VF Corporation	Splendid	B-
VF Corporation	The North Face	B-
VF Corporation	Timberland	B-
VF Corporation	Vans	B-
VF Corporation	Wrangler	B-
Voyager Distributing Co*	Jump*	F
Voyager Distributing Co*	Kachel*	F
Voyager Distributing Co*	Ping Pong*	F
Webster Holdings	David Lawrence	C-
Webster Holdings	Marcs	C-
Wish*	Wish*	F
Zimmermann	Zimmermann	C+

* = non-responsive companies

BRAND INDEX

GRADE BY BRAND

A-E

Brand	Parent Company	Grade
& Other Stories	H&M	B+
7 For All Mankind	VF Corporation	B-
ABCD Indie	Industrie	B+
Abercrombie & Fitch*	Abercrombie & Fitch*	D+
abercrombie kids*	Abercrombie & Fitch*	D+
Actil	Pacific Brands	A-
Active	Target Australia	B-
adidas	adidas Group	A-
Agenda	David Jones	B+
Airflex*	Betts*	F
Alannah Hill	Factory X	C
Aldi	Aldi	C+
Ally*	Ally Fashion*	F
Alta Linea	David Jones	B+
American Apparel	American Apparel	B
Anthea Crawford*	Anthea Crawford*	C+
ARROW	PVH Corp	C+
AS Colour	AS Colour	B-
ASOS	ASOS	B-
Asphalt*	Pavement United Brands*	D-
Athleta	Gap Inc.	B-
Audrey Blue	Mighty Good Undies	A+
Autograph	Specialty Fashion Group	B
Avella	Big W	C+
Bali	Hanesbrands Inc.	B+
Banana Republic	Gap Inc.	B-
Bardot	Bardot	C-
Bardot Junior	Bardot	C-
Barely There	Hanesbrands Inc.	B+

Brand	Parent Company	Grade
Basque	Myer	C+
Beare & Ley	Lowes	D+
Belle Curve	Target Australia	B-
beme	Noni B Group	C
Ben Sherman	Ben Sherman Australia	C-
Berlei	Pacific Brands	A-
Bershka	Inditex	A
Best & Less	Best & Less	C
Betts Kids*	Betts*	F
Betts*	Betts*	F
Billabong	Billabong	C+
Bisley*	Gazal*	D-
Black Pepper	The PAS Group	C+
Blaq	Myer	C+
Bloch*	Bloch*	F
Blue Illusion	Blue Illusion	C-
Boden	Boden	B-
Bonds	Pacific Brands	A-
Breakaway	The PAS Group	C+
Bulwark	VF Corporation	B-
Burton Menswear	Arcadia Group	C+
C9 by Champion	Hanesbrands Inc.	B+
Calvin Klein	PVH Corp	C+
Capture	EziBuy	C+
Champion	Hanesbrands Inc.	B+
Cheap Monday	H&M	B+
City Chic	Specialty Fashion Group	B
Clarks	Clarks	C+
Cobra Golf	Puma	B-

Brand	Parent Company	Grade
Coco Beach*	Pavement United Brands*	D-
Coles	Coles	C+
Colorado	Fusion Retail Brands	C-
Connor	Retail Apparel Group	C+
Converse*	Nike*	C+
COS	H&M	B+
Cotton On	Cotton On Group	A-
Cotton On Body	Cotton On Group	A-
Cotton On Kids	Cotton On Group	A-
Country Road	Country Road Group	B+
Crestell	Pacific Brands	A-
Crossroads	Specialty Fashion Group	B
Cue	Cue Clothing Co	B-
Dangerfield	Factory X	C
Dannii Minogue	Target Australia	B-
Darn Tough	Simon de Winter	C+
David Jones	David Jones	B+
David Lawrence	Webster Holdings	C-
DC	Quiksilver	C
Decjuba*	Decjuba*	F
Diana Ferrari	Fusion Retail Brands	C-
DIM	Hanesbrands Inc.	B+
Dockers	Levi Strauss & Co.	B+
Dorothy Perkins	Arcadia Group	C+
Dotti	Just Group	C+
Dunlop	Designworks	B-
Dunlopillo	Pacific Brands	A-
Dymples	Big W	C+
Eagle Creek	VF Corporation	B-

* = non-responsive companies

BRAND INDEX

GRADE BY BRAND

E-M

Brand	Parent Company	Grade
Eastpak	VF Corporation	B-
Element	Billabong	C+
Elka Collective	Brand Collective	C
Ella Moss	VF Corporation	B-
Elwood	Brand Collective	C
Emerge	EziBuy	C+
Emerson	Big W	C+
Equus	The PAS Group	C+
Esprit	Esprit	B+
Etiko	Etiko	A+
Evans	Arcadia Group	C+
Everlast	Designworks	B-
Evil Twin	House of Quirky	C-
Explorer	Pacific Brands	A-
Extra Pepper	The PAS Group	C+
EziBuy	EziBuy	C+
factorie	Cotton On Group	A-
Fairydown	Pacific Brands	A-
Farmers*	Farmers*	F
Fine Lines	Simon de Winter	C+
Forever 21	Forever 21	D+
Forever New	Forever New	B
Freeset	Freeset	A-
Fruit of the Loom	Fruit of the Loom	B-
Future You	Target Australia	B-
Gap	Gap Inc.	B-
Gazal*	Gazal*	D-
Gear for Sports	Hanesbrands Inc.	B+

Brand	Parent Company	Grade
General Pants	General Pants	C
General Pants Co Basics	General Pants	C
Get Formal*	Corporate Apparel Group*	F
Glassons	Glassons	B-
Gorman	Gorman	C+
Grace Hill	EziBuy	C+
Grosby	Grosby	C
Gum*	Pavement United Brands*	D-
Guy Leech	Big W	C+
H&M	H&M	B+
Hanes	Hanesbrands Inc.	B+
Henri Bendel*	L Brands*	D+
Hestia	Pacific Brands	A-
Holeproof	Pacific Brands	A-
Hollister*	Abercrombie & Fitch*	D+
Honolulu Surf Co.	Billabong	C+
Horace Small	VF Corporation	B-
Hurley*	Nike*	C+
Hush Puppies	Hush Puppies	C+
Icebreaker*	Icebreaker*	D-
Indie	Industrie	B+
Indie & Co	Industrie	B+
Industrie	Industrie	B+
INTERMIX	Gap Inc.	B-
IZOD	PVH Corp	C+
Jack London	Factory X	C
Jacob & Co	Target Australia	B-
Jacqui E	Just Group	C+

Brand	Parent Company	Grade
JAG	APG & Co	A-
Jansport	VF Corporation	B-
Jay Jays	Just Group	C+
Jeanswest	Jeanswest	B+
Jets	Jets	B
Jockey	Pacific Brands	A-
Johnny Bigg	Retail Apparel Group	C+
Julius Marlow	Julius Marlow	C+
Jump*	Voyager Distributing Co*	F
Just Jeans	Just Group	C+
Kachel*	Voyager Distributing Co*	F
Karen Walker	Karen Walker	B+
Kathmandu	Kathmandu	B+
Katies	Specialty Fashion Group	B
Kayser	Simon de Winter	C+
Kipling	VF Corporation	B-
Kmart	Kmart	B
Knights Apparel	Hanesbrands Inc.	B+
Kookai	Kookai	B-
Kowtow	Kowtow	A
Kustom	Billabong	C+
La Senza*	L Brands*	D+
Lacoste	Lacoste	C+
LEE	VF Corporation	B-
Lee Cooper	Big W	C+
Lemonade*	Pavement United Brands*	D-
Levi's	Levi Strauss & Co.	B+
Lily Loves	Target Australia	B-

* = non-responsive companies

BRAND INDEX

GRADE BY BRAND

M-T

* = non-responsive companies

Brand	Parent Company	Grade
Liminal Apparel	Liminal Apparel	A
Lipsy	Next	C+
Liz Jordan	Noni B Group	C
Lorna Jane	Lorna Jane	C+
Lowes	Lowes	D+
Lucy	VF Corporation	B-
Lululemon	Lululemon Athletica	B+
L'urv	Factory X	C
Macpac	Macpac	B-
Maidenform	Hanesbrands Inc.	B+
Majestic	VF Corporation	B-
Marco Polo	The PAS Group	C+
Marcs	Webster Holdings	C-
Massimo Dutti	Inditex	A
Mathers	Fusion Retail Brands	C-
Max	Max	C
MAXX	Target Australia	B-
Michelle Bridges	Big W	C+
Mighty Good Undies	Mighty Good Undies	A+
Milana	David Jones	B+
Milkshake	Myer	C+
Millers	Specialty Fashion Group	B
Mimco	Country Road Group	B+
MINKPINK	House of Quirky	C-
MIRROU	Fast Future Brands	D+
Miss Selfridge	Arcadia Group	C+
Miss Shop	Myer	C+
Mix Apparel	Coles	C+

Brand	Parent Company	Grade
Monki	H&M	B+
Mooks	Designworks	B-
Mossimo	Brand Collective	C
Mr Big	Target Australia	B-
Napapijri	VF Corporation	B-
Nautica	VF Corporation	B-
New Balance	New Balance	B-
Next	Next	C+
Nike*	Nike*	C+
Noni B	Noni B Group	C
Nudie Jeans	Nudie Jeans	A-
Old Navy	Gap Inc.	B-
Olga	PVH Corp	C+
Oroton	Oroton Group	B-
Oxford*	Oxford*	F
Oysho	Inditex	A
Patagonia	Patagonia	A
Pavement*	Pavement United Brands*	D-
Peter Alexander	Just Group	C+
Peter Morrissey	Big W	C+
Ping Pong*	Voyager Distributing Co*	F
Pink*	L Brands*	D+
Piper	Myer	C+
Platinum	Pacific Brands	A-
Playtex	Hanesbrands Inc.	B+
Pom Pom*	Pavement United Brands*	D-
Portmans	Just Group	C+
Princess Highway	Factory X	C

Brand	Parent Company	Grade
Pull&Bear	Inditex	A
Puma	Puma	B-
Quiksilver	Quiksilver	C
R.M. Williams	R.M. Williams	B+
Razzamatazz	Pacific Brands	A-
Red Kap	VF Corporation	B-
Red Robin	Pacific Brands	A-
Reebok	adidas Group	A-
Reef	VF Corporation	B-
Regatta	Myer	C+
Republic	Designworks	B-
Reserve	Myer	C+
Review	The PAS Group	C+
Revival	Factory X	C
Riders by LEE	VF Corporation	B-
Rio	Pacific Brands	A-
Rip Curl	Rip Curl	C+
Rivers	Specialty Fashion Group	B
Rock & Republic	VF Corporation	B-
Rockmans	Noni B Group	C
Rockwear	Retail Apparel Group	C+
Roger David*	Roger David*	F
Ron Bennett*	Corporate Apparel Group*	F
Roxy	Quiksilver	C
RREPP	RREPP	A+
Rubi	Cotton On Group	A-
Russell Brands	Fruit of the Loom	B-
Rustler	VF Corporation	B-

BRAND INDEX

GRADE BY BRAND

T-Z

* = non-responsive companies

Brand	Parent Company	Grade
RVCA	Billabong	C+
SABA	APG & Co	A-
Sara	EziBuy	C+
Sass & Bide	Myer	C+
Scram*	Pavement United Brands*	D-
Seafolly	Seafolly	B-
Seed Heritage	Seed Heritage	C-
SEW253*	Corporate Apparel Group*	F
Sheer Relief	Pacific Brands	A-
Sheridan	Pacific Brands	A-
Simon de Winter	Simon de Winter	C+
Sista	Designworks	B-
Slazenger	Designworks	B-
Smartwool	VF Corporation	B-
Somedays Lovin'	House of Quirky	C-
Spalding	Fruit of the Loom	B-
Speedo	PVH Corp	C+
Splendid	VF Corporation	B-
Sportscraft	APG & Co	A-
Sportsgirl	Sussan Group	B
Sprout	Myer	C+
St James	David Jones	B+
Staple the Label	House of Quirky	C-
Stradivarius	Inditex	A
Superflex DNM	Target Australia	B-
Supré	Cotton On Group	A-
Sussan	Sussan Group	B
Suzanne Grae	Sussan Group	B
Table Eight	Noni B Group	C

Brand	Parent Company	Grade
Target	Target Australia	B-
Tarocash	Retail Apparel Group	C+
TaylorMade	adidas Group	A-
TEMT	Fast Future Brands	D+
The Foundry	David Jones	B+
The North Face	VF Corporation	B-
The Warehouse*	The Warehouse*	C
Tigerlily	Billabong	C+
Timberland	VF Corporation	B-
Tommy Hilfiger	PVH Corp	C+
Tontine	Pacific Brands	A-
Topman	Arcadia Group	C+
Topshop	Arcadia Group	C+
Tree of Life	Tree of Life	C+
Trenery	Country Road Group	B+
Tutu's & Tambourines	Target Australia	B-
UNIQLO	UNIQLO	B
Urban	EziBuy	C+
Uterqüe	Inditex	A
Valleygirl	Fast Future Brands	D+
Van Heusen	PVH Corp	C+
Vanity Fair	Fruit of the Loom	B-
Vans	VF Corporation	B-
Veronika Maine	Cue Clothing Co	B-
Victoria's Secret*	L Brands*	D+
Volley	Grosby	C
Voodoo	Pacific Brands	A-
W. Lane	Noni B Group	C
Wallis	Arcadia Group	C+

Brand	Parent Company	Grade
Warner's	PVH Corp	C+
Wax Bros*	Pavement United Brands*	D-
Weekday	H&M	B+
Williams	Fusion Retail Brands	C-
Wish*	Wish*	F
Witchery	Country Road Group	B+
Wonder Comfort	Target Australia	B-
Wonderbra	Hanesbrands Inc.	B+
Wrangler	VF Corporation	B-
Xcel	Billabong	C+
Yarra Trail	The PAS Group	C+
yd.	Retail Apparel Group	C+
Yvonne Black	The PAS Group	C+
Zara	Inditex	A
Zara Home	Inditex	A
Zimmermann	Zimmermann	C+
Zom-B*	Pavement United Brands*	D-

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

Parent Company	Brand	Grade
Mighty Good Undies	Audrey Blue	A+
Etiko	Etiko	A+
Mighty Good Undies	Mighty Good Undies	A+
RREPP	RREPP	A+
Inditex	Bershka	A
Kowtow	Kowtow	A
Liminal Apparel	Liminal Apparel	A
Inditex	Massimo Dutti	A
Inditex	Oysho	A
Patagonia	Patagonia	A
Inditex	Pull&Bear	A
Inditex	Stradivarius	A
Inditex	Uterqüe	A
Inditex	Zara	A
Inditex	Zara Home	A
Pacific Brands	Actil	A-
adidas Group	adidas	A-
Pacific Brands	Berlei	A-
Pacific Brands	Bonds	A-
Cotton On Group	Cotton On	A-
Cotton On Group	Cotton On Body	A-
Cotton On Group	Cotton On Kids	A-
Pacific Brands	Crestell	A-
Pacific Brands	Dunlopillo	A-
Pacific Brands	Explorer	A-
Cotton On Group	factorie	A-
Pacific Brands	Fairydown	A-
Freeset	Freeset	A-
Pacific Brands	Hestia	A-

Parent Company	Brand	Grade
Pacific Brands	Holeproof	A-
APG & Co	JAG	A-
Pacific Brands	Jockey	A-
Nudie Jeans	Nudie Jeans	A-
Pacific Brands	Platinum	A-
Pacific Brands	Razzamatazz	A-
Pacific Brands	Red Robin	A-
adidas Group	Reebok	A-
Pacific Brands	Rio	A-
Cotton On Group	Rubi	A-
APG & Co	SABA	A-
Pacific Brands	Sheer Relief	A-
Pacific Brands	Sheridan	A-
APG & Co	Sportscraft	A-
Cotton On Group	Supré	A-
adidas Group	TaylorMade	A-
Pacific Brands	Tontine	A-
Pacific Brands	Voodoo	A-
H&M	& Other Stories	B+
Industrie	ABCD Indie	B+
David Jones	Agenda	B+
David Jones	Alta Linea	B+
Hanesbrands Inc.	Bali	B+
Hanesbrands Inc.	Barely There	B+
Hanesbrands Inc.	C9 by Champion	B+
Hanesbrands Inc.	Champion	B+
H&M	Cheap Monday	B+
H&M	COS	B+
Country Road Group	Country Road	B+

Parent Company	Brand	Grade
David Jones	David Jones	B+
Hanesbrands Inc.	DIM	B+
Levi Strauss & Co.	Dockers	B+
Esprit	Esprit	B+
Hanesbrands Inc.	Gear for Sports	B+
H&M	H&M	B+
Hanesbrands Inc.	Hanes	B+
Industrie	Indie	B+
Industrie	Indie & Co	B+
Industrie	Industrie	B+
Jeanswest	Jeanswest	B+
Karen Walker	Karen Walker	B+
Kathmandu	Kathmandu	B+
Hanesbrands Inc.	Knights Apparel	B+
Levi Strauss & Co.	Levi's	B+
Lululemon Athletica	Lululemon	B+
Hanesbrands Inc.	Maidenform	B+
David Jones	Milana	B+
Country Road Group	Mimco	B+
H&M	Monki	B+
Hanesbrands Inc.	Playtex	B+
R.M. Williams	R.M. Williams	B+
David Jones	St James	B+
David Jones	The Foundry	B+
Country Road Group	Trenery	B+
H&M	Weekday	B+
Country Road Group	Witchery	B+
Hanesbrands Inc.	Wonderbra	B+
American Apparel	American Apparel	B

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

Parent Company	Brand	Grade
Specialty Fashion Group	Autograph	B
Specialty Fashion Group	City Chic	B
Specialty Fashion Group	Crossroads	B
Forever New	Forever New	B
Jets	Jets	B
Specialty Fashion Group	Katies	B
Kmart	Kmart	B
Specialty Fashion Group	Millers	B
Specialty Fashion Group	Rivers	B
Sussan Group	Sportsgirl	B
Sussan Group	Sussan	B
Sussan Group	Suzanne Grae	B
UNIQLO	UNIQLO	B
VF Corporation	7 For All Mankind	B-
Target Australia	Active	B-
AS Colour	AS Colour	B-
ASOS	ASOS	B-
Gap Inc.	Athleta	B-
Gap Inc.	Banana Republic	B-
Target Australia	Belle Curve	B-
Boden	Boden	B-
VF Corporation	Bulwark	B-
Puma	Cobra Golf	B-
Cue Clothing Co	Cue	B-
Target Australia	Dannii Minogue	B-
Designworks	Dunlop	B-
VF Corporation	Eagle Creek	B-
VF Corporation	Eastpak	B-
VF Corporation	Ella Moss	B-

Parent Company	Brand	Grade
Designworks	Everlast	B-
Fruit of the Loom	Fruit of the Loom	B-
Target Australia	Future You	B-
Gap Inc.	Gap	B-
Glassons	Glassons	B-
VF Corporation	Horace Small	B-
Gap Inc.	INTERMIX	B-
Target Australia	Jacob & Co	B-
VF Corporation	Jansport	B-
VF Corporation	Kipling	B-
Kookai	Kookai	B-
VF Corporation	LEE	B-
Target Australia	Lily Loves	B-
VF Corporation	Lucy	B-
Macpac	Macpac	B-
VF Corporation	Majestic	B-
Target Australia	MAXX	B-
Designworks	Mooks	B-
Target Australia	Mr Big	B-
VF Corporation	Napapijri	B-
VF Corporation	Nautica	B-
New Balance	New Balance	B-
Gap Inc.	Old Navy	B-
Oroton Group	Oroton	B-
Puma	Puma	B-
VF Corporation	Red Kap	B-
VF Corporation	Reef	B-
Designworks	Republic	B-
VF Corporation	Riders by LEE	B-

Parent Company	Brand	Grade
VF Corporation	Rock & Republic	B-
Fruit of the Loom	Russell Brands	B-
VF Corporation	Rustler	B-
Seafolly	Seafolly	B-
Designworks	Sista	B-
Designworks	Slazenger	B-
VF Corporation	Smartwool	B-
Fruit of the Loom	Spalding	B-
VF Corporation	Splendid	B-
Target Australia	Superflex DNM	B-
Target Australia	Target	B-
VF Corporation	The North Face	B-
VF Corporation	Timberland	B-
Target Australia	Tutu's & Tambourines	B-
Fruit of the Loom	Vanity Fair	B-
VF Corporation	Vans	B-
Cue Clothing Co	Veronika Maine	B-
Target Australia	Wonder Comfort	B-
VF Corporation	Wrangler	B-
Aldi	Aldi	C+
Anthea Crawford*	Anthea Crawford*	C+
PVH Corp	ARROW	C+
Big W	Avella	C+
Myer	Basque	C+
Billabong	Billabong	C+
The PAS Group	Black Pepper	C+
Myer	Blaq	C+
The PAS Group	Breakaway	C+
Arcadia Group	Burton Menswear	C+

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

* = non-responsive companies

Parent Company	Brand	Grade
PVH Corp	Calvin Klein	C+
EziBuy	Capture	C+
Clarks	Clarks	C+
Coles	Coles	C+
Retail Apparel Group	Connor	C+
Nike*	Converse*	C+
Simon de Winter	Darn Tough	C+
Arcadia Group	Dorothy Perkins	C+
Just Group	Dotti	C+
Big W	Dymples	C+
Billabong	Element	C+
EziBuy	Emerge	C+
Big W	Emerson	C+
The PAS Group	Equus	C+
Arcadia Group	Evans	C+
The PAS Group	Extra Pepper	C+
EziBuy	EziBuy	C+
Simon de Winter	Fine Lines	C+
Gorman	Gorman	C+
EziBuy	Grace Hill	C+
Big W	Guy Leech	C+
Billabong	Honolua Surf Co.	C+
Nike*	Hurley*	C+
Hush Puppies	Hush Puppies	C+
PVH Corp	IZOD	C+
Just Group	Jacqui E	C+
Just Group	Jay Jays	C+
Retail Apparel Group	Johnny Bigg	C+
Julius Marlow	Julius Marlow	C+

Parent Company	Brand	Grade
Just Group	Just Jeans	C+
Simon de Winter	Kayser	C+
Billabong	Kustom	C+
Lacoste	Lacoste	C+
Big W	Lee Cooper	C+
Next	Lipsy	C+
Lorna Jane	Lorna Jane	C+
The PAS Group	Marco Polo	C+
Big W	Michelle Bridges	C+
Myer	Milkshake	C+
Arcadia Group	Miss Selfridge	C+
Myer	Miss Shop	C+
Coles	Mix Apparel	C+
Next	Next	C+
Nike*	Nike*	C+
PVH Corp	Olga	C+
Just Group	Peter Alexander	C+
Big W	Peter Morrissey	C+
Myer	Piper	C+
Just Group	Portmans	C+
Myer	Regatta	C+
Myer	Reserve	C+
The PAS Group	Review	C+
Rip Curl	Rip Curl	C+
Retail Apparel Group	Rockwear	C+
Billabong	RVCA	C+
EziBuy	Sara	C+
Myer	Sass & Bide	C+
Simon de Winter	Simon de Winter	C+

Parent Company	Brand	Grade
PVH Corp	Speedo	C+
Myer	Sprout	C+
Retail Apparel Group	Tarocash	C+
Billabong	Tigerlily	C+
PVH Corp	Tommy Hilfiger	C+
Arcadia Group	Topman	C+
Arcadia Group	Topshop	C+
Tree of Life	Tree of Life	C+
EziBuy	Urban	C+
PVH Corp	Van Heusen	C+
Arcadia Group	Wallis	C+
PVH Corp	Warner's	C+
Billabong	Xcel	C+
The PAS Group	Yarra Trail	C+
Retail Apparel Group	yd.	C+
The PAS Group	Yvonne Black	C+
Zimmermann	Zimmermann	C+
Factory X	Alannah Hill	C
Noni B Group	beme	C
Best & Less	Best & Less	C
Factory X	Dangerfield	C
Quiksilver	DC	C
Brand Collective	Elka Collective	C
Brand Collective	Elwood	C
General Pants	General Pants	C
General Pants	General Pants Co Basics	C
Grosby	Grosby	C
Factory X	Jack London	C
Noni B Group	Liz Jordan	C

BRAND INDEX

BRANDS RANKED HIGHEST TO LOWEST

Parent Company	Brand	Grade
Factory X	L'urv	C
Max	Max	C
Brand Collective	Mossimo	C
Noni B Group	Noni B	C
Factory X	Princess Highway	C
Quiksilver	Quiksilver	C
Factory X	Revival	C
Noni B Group	Rockmans	C
Quiksilver	Roxy	C
Noni B Group	Table Eight	C
The Warehouse*	The Warehouse*	C
Grosby	Volley	C
Noni B Group	W. Lane	C
Bardot	Bardot	C-
Bardot	Bardot Junior	C-
Ben Sherman Australia	Ben Sherman	C-
Blue Illusion	Blue Illusion	C-
Fusion Retail Brands	Colorado	C-
Webster Holdings	David Lawrence	C-
Fusion Retail Brands	Diana Ferrari	C-
House of Quirky	Evil Twin	C-
Webster Holdings	Marcs	C-
Fusion Retail Brands	Mathers	C-
House of Quirky	MINKPINK	C-
Seed Heritage	Seed Heritage	C-
House of Quirky	Somedays Lovin'	C-
House of Quirky	Staple the Label	C-
Fusion Retail Brands	Williams	C-
Abercrombie & Fitch*	Abercrombie & Fitch*	D+

Parent Company	Brand	Grade
Abercrombie & Fitch*	abercrombie kids*	D+
Lowes	Beare & Ley	D+
Forever 21	Forever 21	D+
L Brands*	Henri Bendel*	D+
Abercrombie & Fitch*	Hollister*	D+
L Brands*	La Senza*	D+
Lowes	Lowes	D+
Fast Future Brands	MIRROU	D+
L Brands*	Pink*	D+
Fast Future Brands	TEMPT	D+
Fast Future Brands	Valleygirl	D+
L Brands*	Victoria's Secret*	D+
Pavement United Brands*	Asphalt*	D-
Gazal*	Bisley*	D-
Pavement United Brands*	Coco Beach*	D-
Gazal*	Gazal*	D-
Pavement United Brands*	Gum*	D-
Icebreaker*	Icebreaker*	D-
Pavement United Brands*	Lemonade*	D-
Pavement United Brands*	Pavement*	D-
Pavement United Brands*	Pom Pom*	D-
Pavement United Brands*	Scram*	D-
Pavement United Brands*	Wax Bros*	D-
Pavement United Brands*	Zom-B*	D-
Betts*	Airflex*	F
Ally Fashion*	Ally*	F
Betts*	Betts Kids*	F
Betts*	Betts*	F
Bloch*	Bloch*	F

Parent Company	Brand	Grade
Decjuba*	Decjuba*	F
Farmers*	Farmers*	F
Corporate Apparel Group*	Get Formal*	F
Voyager Distributing Co*	Jump*	F
Voyager Distributing Co*	Kachel*	F
Oxford*	Oxford*	F
Voyager Distributing Co*	Ping Pong*	F
Roger David*	Roger David*	F
Corporate Apparel Group*	Ron Bennett*	F
Corporate Apparel Group*	SEW253*	F
Wish*	Wish*	F

* = non-responsive companies

Survey Data

This section provides a section-by-section and question-by-question breakdown of company responses to the survey used to derive grades.

SURVEY DATA

POLICIES

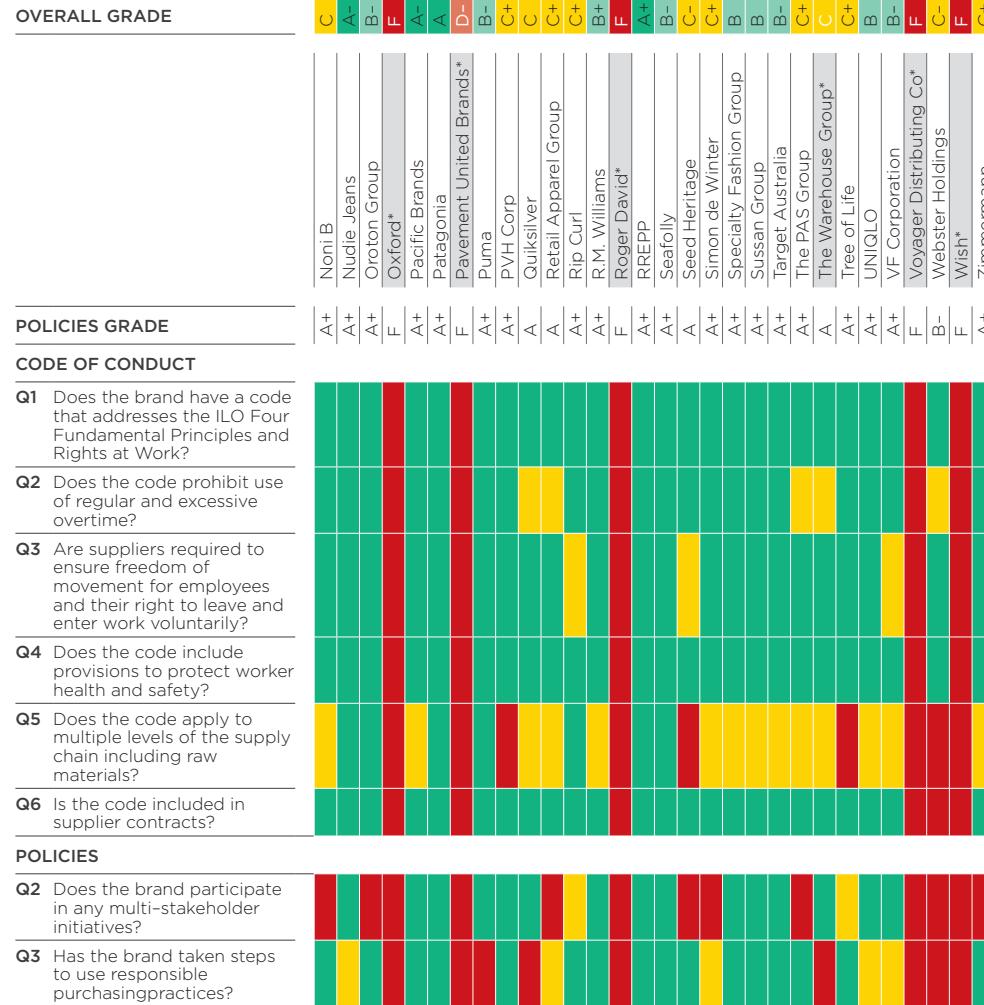
Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

POLICIES

N-Z



Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

KNOWING YOUR SUPPLIERS

A-M

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

KNOWING YOUR SUPPLIERS

M-Z

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Final Stage Production: A–M

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Final Stage Production: A-M

OVERALL GRADE	C	A+	C+	B-	C+	C+	C	A	B-	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Max	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Mighty Good Undies	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Myer	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
New Balance	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Next	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Nike*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Noni B	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Nudie Jeans	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Oroton Group	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Oxford*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Pacific Brands	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Patagonia	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Pavement United Brands*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Puma	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
PVH Corp	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Quiksilver	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Rip Curl	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
R.M. Williams	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Roger David*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
RREPP	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Seafolly	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Seed Heritage	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Simon de Winter	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Specialty Fashion Group	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Sussan Group	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Target Australia	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
The P&S Group	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
The Warehouse Group*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Tree of Life	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
UNIQLO	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
VF Corporation	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Voyager Distributing Co*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Webster Holdings	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Wish*	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C
Zimmermann	D+	B+	C+	C+	C+	C+	C	C	B+	F	A	A	D-	B-	C+	C	C+	C+	B+	F	A+	B-	C	C+	B	C	B-	F	C	C

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Inputs Production: A–M

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Inputs Production: M-Z

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Raw Materials: A-M

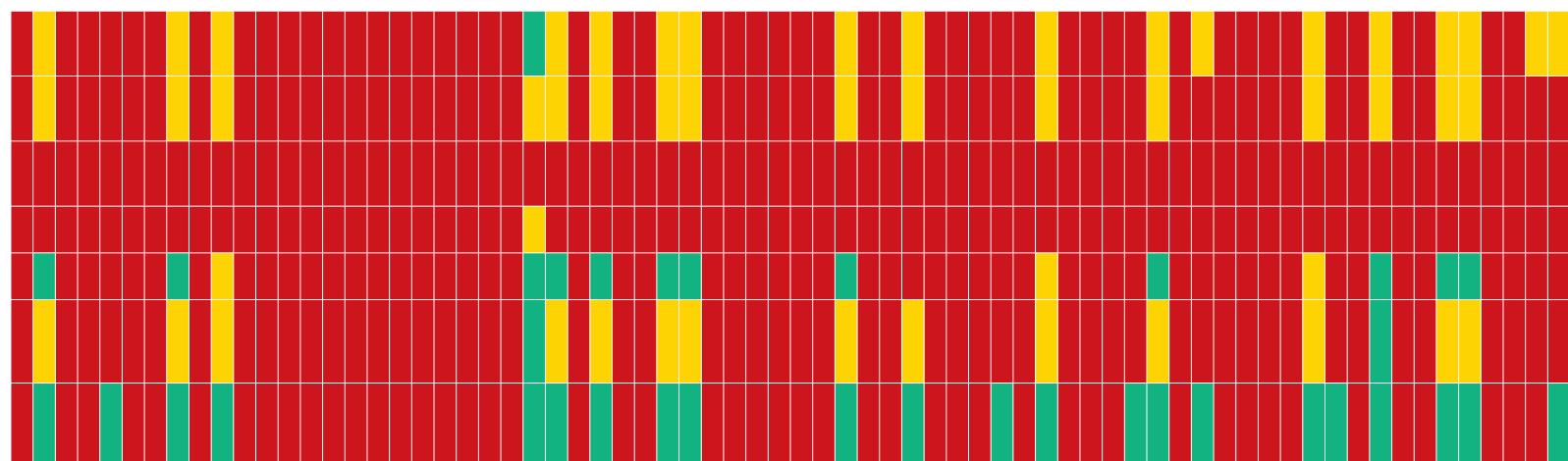
OVERALL GRADE

Abercrombie & Fitch*	D+
adidas Group	A-
Aldi	C
Aly Fashion*	F
American Apparel	B
Anthrea Crawford*	C+
APG & Co	A-
Arcadia Group	C+
AS Colour	B-
ASOS	B-
Bardot	C-
Ben Sherman Australia	C-
Best & Less	C-
Betts*	F
Big W	C+
Billabong	C+
Bloch*	F
Blue Illusion	C-
Boden	B-
Brand Collective	C-
Clarks	C+
Coles	F
Corporate Apparel Group*	F
Cotton On Group	B+
Country Road Group	B+
Cue Clothing Co	B-
David Jones	B+
Decibula*	F
Designworks	B-
Espirit	B+
Etko	A+
Ezibuy	C
Factory X	C
Farmers*	F
Fast Future Brands	D+
Forever 21	D+
Forever New	B
Freezet	A-
Fruit of the Loom	B-
Fusion Retail Brands	C-
Gap	B-
Gazal*	D-
General Pants	C
Glassons	B-
Gorman	C+
Grosby	D
H&M	B+
Hanesbrands Inc.	B+
House of Quirky	C-
Hushpuppies	D+
Icebreaker*	F
Inditex	A+
Industrie	B-
Jeanswest	B
Jets	C+
Julius Marlow	D+
Just Group	C+
Karen Walker	A-
Kathmandu	B+
Kmart Australia	B-
Kookai	C+
Kowtow	A-
L Brands*	D+
Lacoste	C+
Levi Strauss & Co.	B+
Liminal Apparel	C
Lorna Jane	C+
Lowes	D+
Lululemon Athletica	B+
Macpac	C+

AUDITING & SUPPLIER RELATIONSHIP GRADE

Raw Materials

- Q1** Does the brand audit 100% of its traced facilities over a two-year period? (partial= some monitored)
- Q2** Does the brand audit at least 75% of its traced facilities with unannounced visits or offsite worker interviews? (partial= some)
- Q3** Does the brand share audit reports and corrective action plans publicly? (partial= some)
- Q4** Does the brand share broad audit results publicly?
- Q5** Does the brand have a safety incident reporting and investigation procedure?
- Q6** Does the brand invest in training suppliers, buyers and factory managers to understand human trafficking, child labour, and forced labour risks?
- Q7** Does the brand actively improve leverage and relationships with suppliers, through supplier consolidation and/or industry collaboration?



Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

AUDITING & SUPPLIER RELATIONSHIPS

Raw Materials: M-Z

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

WORKER EMPOWERMENT

Final Manufacturing/Inputs Production: A-L

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

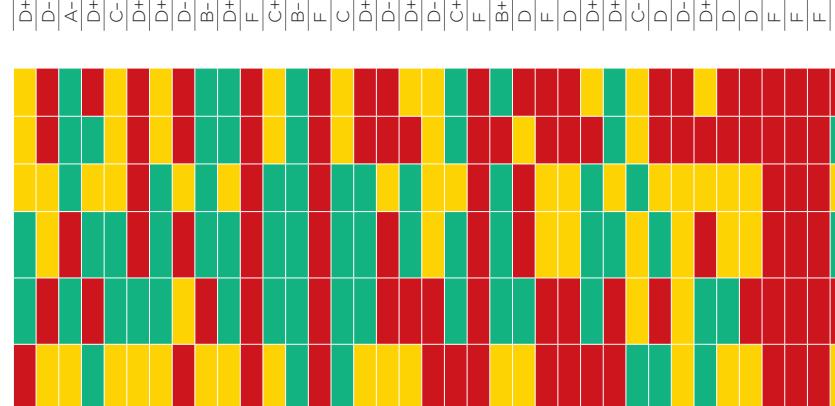
WORKER EMPOWERMENT

Final Manufacturing/Inputs Production: M-Z

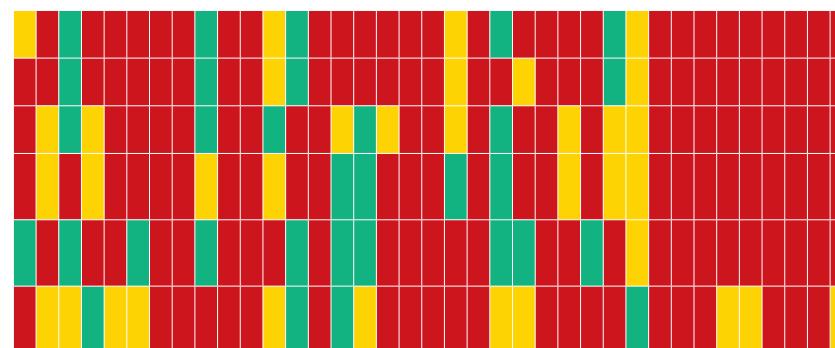
OVERALL GRADE

Macpac	B	C	A+	C+	B-	C+	C	A	B-	F	A-	A	D-	B-	C+	C	B+	C+	F	A+	C	F	C	C+	
Max	D+	D-	A-	D+	C	D+	D-	B	D+	F	C+	B-	D-	B	D+	C	C+	C	B+	B+	C+	B-	F	C	C+
Mighty Good Undies	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
New Balance	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Next	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Nike*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Noni B	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Nudie Jeans	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Oroton Group	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Oxford*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Pacific Brands	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Patagonia	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Pavement United Brands*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Puma	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
PVH Corp	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Quicksilver	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Retail Apparel Group	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Rip Curl	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Roger David*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
RREPP	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Seafolly	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Seed Heritage	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Simon de Winter	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Specialty Fashion Group	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Sussan Group	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Target Australia	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
The FAS Group	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
The Warehouse Group*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Tree of Life	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
UNIQLO	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
VF Corporation	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Voyager Distributing Co*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Webster Holdings	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Wish*	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-
Zimmermann	D-	A-	C+	B-	C+	C	C+	C	C	A-	A	A	D-	B-	B	B+	B+	B+	B+	B+	B+	B-	B-	B-	B-

WORKER EMPOWERMENT GRADE



Inputs Production



Key: YES (green) PARTIAL (yellow) NO (red)

* = non-responsive companies

SURVEY DATA

WORKER EMPOWERMENT

Raw Materials: A-L

Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

WORKER EMPOWERMENT

Raw Materials: M-Z

OVERALL GRADE

Macpac	B-
Max	C
Mighty Good Undies	A+
Myer	C+
New Balance	B-
Next	C+
Nike*	C+
Noni B	A
Nudie Jeans	B-
Oroton Group	F
Oxford*	C+
Pacific Brands	A-
Patagonia	A
Pavement United Brands*	D-
Puma	B-
PVH Corp	C+
Quiksilver	C+
Retail Apparel Group	C+
Rip Curl	C+
R.M. Williams	B+
Roger David*	F
RREPP	A+
Seafolly	B-
Seed Heritage	C-
Simon de Winter	C+
Specialty Fashion Group	B
Sussan Group	B
Target Australia	B-
The PAS Group	C+
The Warehouse Group*	C
Tree of Life	C+
UNIQLO	D
VF Corporation	D
Voyager Distributing Co*	F
Webster Holdings	C
Wish*	F
Zimmermann	C+

WORKER EMPOWERMENT GRADE

Raw Materials

- Q1** Are democratically elected unions in at least 50% of facilities? (partial= some)
- Q2** Are collective bargaining agreements in at least 50% of facilities? (partial= some)
- Q3** Does the brand have a functioning grievance mechanism?
- Q4** Are workers trained on their rights and entitlements and how to use grievance mechanisms?
- Q5** Does the company actively engage with local civil society organisations working on labour rights in the regions that they operate in?
- Q6** Does the brand have any systems or policies in place to rehabilitate child and forced labourers if discovered?



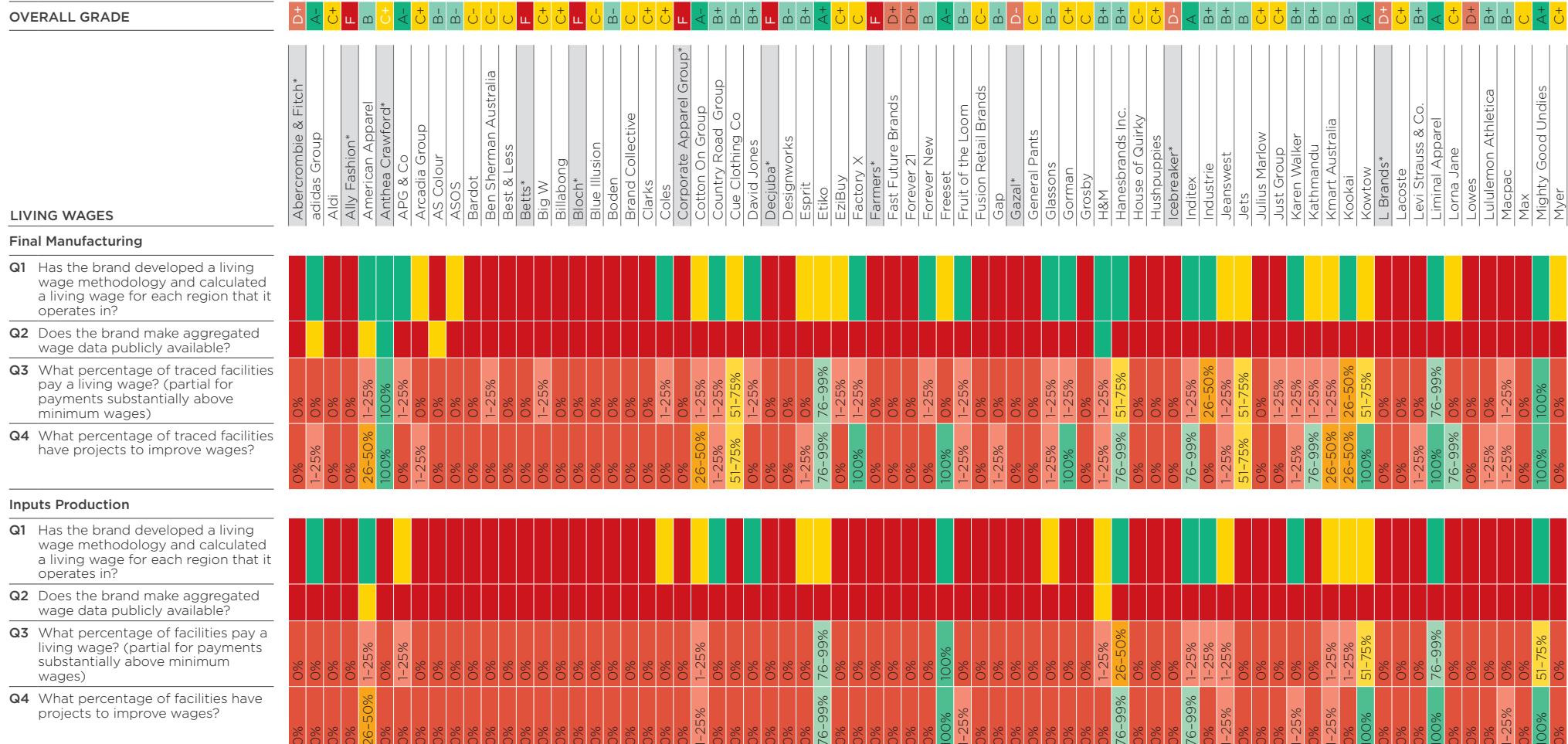
Key: YES PARTIAL NO

* = non-responsive companies

SURVEY DATA

LIVING WAGES

Final Manufacturing/Inputs Production: A-M



Key: YES PARTIAL NO

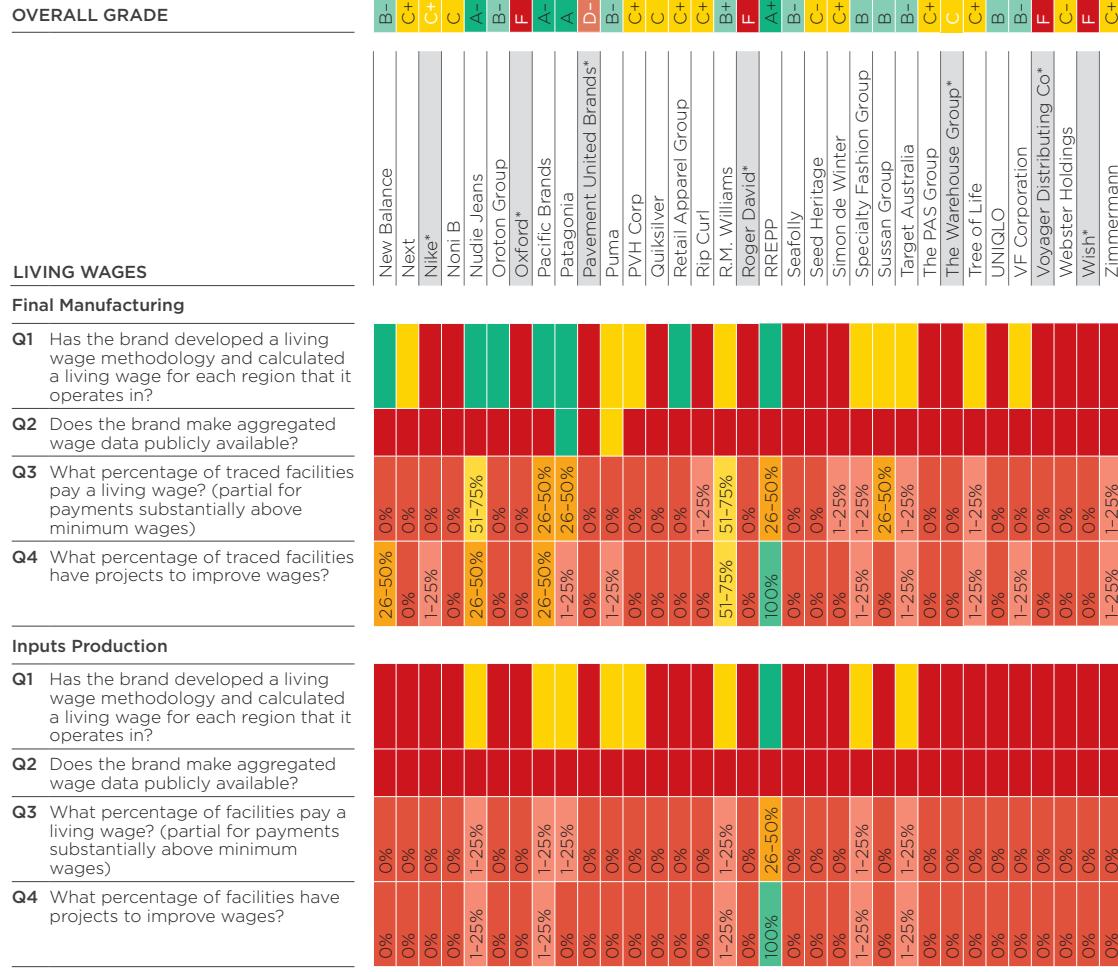
100% 76-99% 51-75% 26-50% 1-25% 0%

* = non-responsive companies

SURVEY DATA

LIVING WAGES

Final Manufacturing/Inputs Production: N-Z



Key: YES PARTIAL NO

100% 76-99% 51-75% 26-50% 1-25% 0%

* = non-responsive companies

SURVEY DATA

LIVING WAGES

Raw Materials: A-M

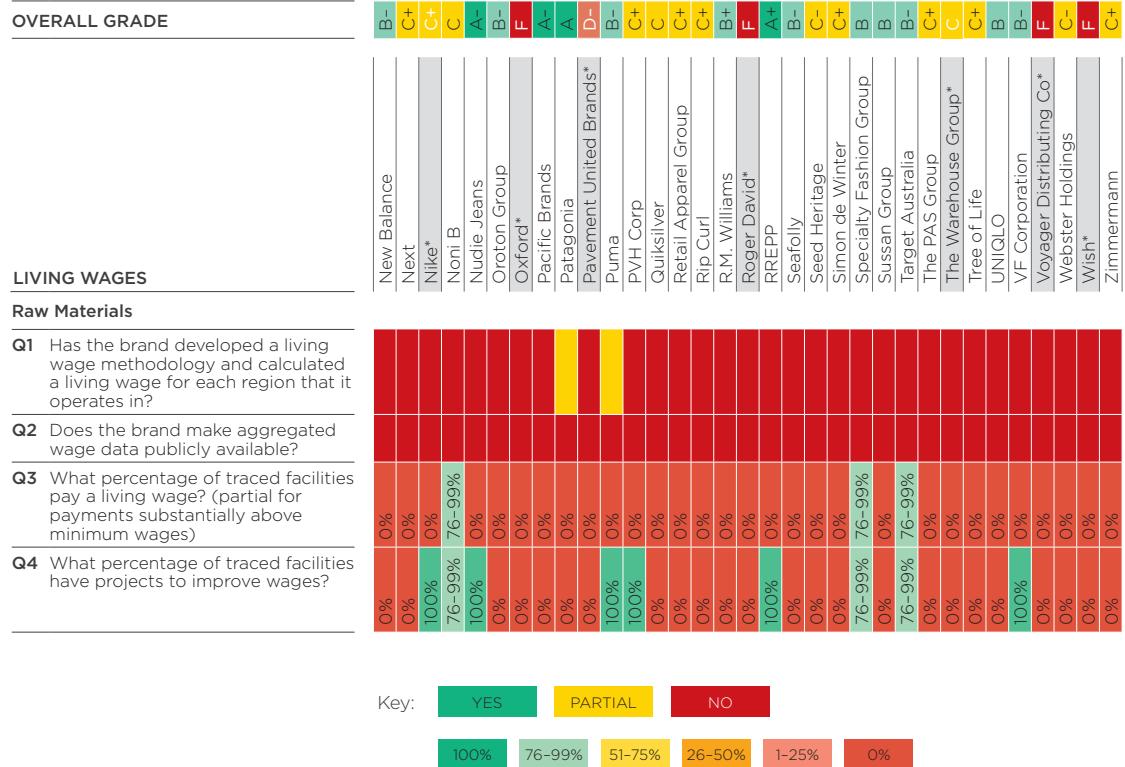
Key: YES PARTIAL NO

100% 76-99% 51-75% 26-50% 1-25% 0%

* = non-responsive companies

SURVEY DATA LIVING WAGES

Raw Materials: N-Z



* = non-responsive companies

Appendices

STATEMENTS FROM NON-RESPONSIVE COMPANIES

Of the 106 companies covered in our 2017 report, 17 companies chose not to engage with our research and they have been listed as "non-responsive". We offered to include a short statement from each of them on why they decided not to participate in the research. The following 5 companies provided statements:

Corporate Apparel Group

Corporate Apparel Group indicated that consumers can find publicly available information about the company's ethical responsibility on its website: <http://www.cag.com.au/responsibility-governance/>.

Nike

"Nike, Inc. appreciates opportunities to learn from external organizations, like Baptist World Aid, to continue to understand stakeholder expectations, which can help inform our disclosures. As part of our engagement with BWA's Ethical Supply Chain Research, we have provided links to publicly available information and documentation relating to our supply chain practices. We are committed to putting the protection of workers at the center of our sustainable manufacturing and sourcing business model. Our Code of Conduct and Code Leadership Standards set our minimum standard requirements for all contract factory manufacturers. We will continue to work with fewer, better factories who are committed to engaging, protecting and respecting their workforce. And we will continue to engage with

civil society, governments, and the private sector to affect systemic change to labor and environmental conditions in countries where we operate. For more information please see: <http://about.nike.com/pages/resources-faq>."

Oxford

"A significant number of Oxford's suppliers are subject to rigorous assessments by an independent third party. A detailed Social Audit evaluates each factory on: 1) Child Labour, 2) Forced Labour, 3) Health & Safety, 4) Freedom of Association, 5) Discrimination, 6) Disciplinary Practices, 7) Regular Employment, 8) Working Hours, 9) Compensation.

Our concern for worker exploitation is evidenced by our commitment and perseverance to ensuring organisations within our supply-chain consistently treat their employees fairly and humanely. In respect to providing copies of such SGS reports for broader publication and dissemination by Baptist World Aid, regrettably we wish to advise that Oxford values the sensitive nature of these

reports (and also from a competitive perspective) and as such is unwilling to submit such information for publication in the broader sense. However, should BWA or any member of their team like to visit our premises, we would be more than happy to exhibit such reports."

Pavement United Brands

"Pavement United Brands is committed to ethical and sustainable work and supply chain practices. We strive to ensure a safe and fair working environment for all of our employees, and the employees of our suppliers. The majority of our products are sourced from Southern China where only known reputable, regulated factories are used. As a relatively small business with very limited resources, we simply do not have the time and money to dedicate to pulling together the specific documentation required by surveys such as this."

STATEMENTS FROM NON-RESPONSIVE COMPANIES

The Warehouse

"The Warehouse has had an active Ethical Sourcing programme since 2004, working directly with factories to improve working conditions. We commend Baptist World Aid for their work researching this important topic. We have not participated in their survey because we feel the comparative (A-F) ranking assigned to each brand is potentially misleading for consumers. The Truth Behind the Barcodes reports contain the disclaimer "... we have gathered data on ... (CSR) systems and not on the actual working conditions they are designed to ameliorate." This vital distinction is easily missed by consumers who look to the ranking as a shorthand for "good factory/bad factory". CSR systems are undoubtedly important, however, with so many variations in their application, and challenges to the integrity of the data they rely upon, they should not be taken as an equivalent to "actual working conditions". Hence consumers cannot rely on the report rankings as a valid comparison between brands."

Baptist World Aid welcomes the time that companies have taken to provide a short statement. We remain open to working with all companies we assess, to better understand the systems they have in place to ensure that workers are not being exploited. We appreciate that companies of all sizes have engaged, with most finding the process of being benchmarked and gaining feedback helpful. We believe that strong systems, matched by full, open and honest disclosures by companies (preferably through public disclosure) are the best way for consumers to make decisions on which companies are taking appropriate measures to address exploitation in their supply chain.

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ABOUT BAPTIST WORLD AID

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

We work to achieve our vision through two equally important partnerships:

We partner with like-minded agencies overseas to empower communities to lift themselves out of poverty, challenge injustice and build resilience;

We partner with Christians and churches in Australia, particularly those from the Baptist movement, in generous giving, ethical consumption, courageous advocacy and faithful prayer in order to achieve justice for people living in poverty.

Established in 1959, we work with 38 local partners

in 22 countries in Asia, Africa, the Middle East and the Pacific. Our activities cover four key areas:

Our Community Development projects build lasting solutions to poverty for entire communities;

Our Child Sponsorship program assists children to break down the barriers of poverty — for themselves and their whole community;

Our work in disaster saves lives before, during and after a disaster strikes;

We stand with the oppressed and marginalised and advocate for a more just world.

Baptist World Aid has been involved in campaigning various industries to end worker exploitation for over nine years and began research into the fashion and electronics industries in 2010. This report is the fourth of its kind, and has been renamed the Ethical Fashion Report to reflect the increasingly broad and global scope of our research.

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ABOUT TEARFUND

Motivated by Jesus, we encourage Kiwis to act for justice to relieve poverty among the world's most vulnerable people. Because of this, partnering with Baptist World Aid is a perfect match.

Tearfund combats labour exploitation in three countries through three partners through our

Protect cause. Our partners work across the spectrum in prevention, prosecution, rescue and rehabilitation. We're excited to be adding this new piece to our Protect work. The Ethical Fashion Report and Guide give Kiwis a great tool to vote with their wallets to make ethical choices.

To learn more about our work and our other causes, visit tearfund.org.nz

