



THE RISE OF  
**VEGAN**  
**FASHION**  
*2021*

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# INTRODUCTION

**Vegan fashion is on the rise. In 2019, leading lifestyle magazine *Vogue* reported that stock of vegan fashion products increased by 258% across the UK and US, and things have only improved since then.**

Whilst many automatically think of what is on our plates when we think of the word “vegan”, increasingly businesses, brands and buyers are also thinking about what is in our wardrobes. Veganism is a [lifestyle](#) that encompasses all aspects of life, and as more people across the world embrace a compassionate way of living, different industries start to take notice. This is fuelled not only by businesses responding to consumer demand, but also by more vegan individuals in decision-making positions.

The fashion industry has come under increasing pressure to improve its sustainability and ethical credentials but face some challenges in doing so. Globally, the industry is vast in both scale and complexity, which means that a number of different organisations are needed to tackle various injustices within supply chains.

The Vegan Society’s goal is a world where no animal is exploited, which has a particular relevance to the fashion industry. We know that there is no need for animals to suffer for our wardrobes and want to empower industries and consumers to make kinder choices.

In the fashion industry, the tide may slowly be turning. According to a report by Grand View Research, the global vegan women’s fashion market was [valued](#) at \$396.9 billion in 2019 (vegan footwear accounted for 41.3% of this) with revenue forecasted to reach \$1095.6 billion in 2027. Vegan shoes are certainly hitting the mainstream, with recent years seeing multiple fashion powerhouses breaking into the vegan market for the first time – Gucci, Nike, Reebok, Adidas and Kurt Geiger, to name a few.

There appears to be different levels of acceptance when it comes to the use of non-human animals in the fashion world. Some may wince at the thought of wearing animal fur but have no issue with wearing animal skin, such as leather and suede. On page 5 you can see the consumer perception of different materials and processes used within the fashion industry.

We will look in detail at the animal-based and plant-based leather segments, exploring the question of what consumers really think of these materials, how much are they willing to pay, and what exactly is pineapple leather?

This report is timely. As the United Kingdom has now left the European Union, opportunities arise to shape government policy for a kinder world for animals. At the time of writing, the Department of Environmental, Food and Rural Affairs has just closed a public consultation concerning the fur trade in Great Britain. On page 7 we will look at fur in more detail and highlight recent successes in stopping this cruel industry.

Finally, we consider supply chain issues, what shoppers really want and the robust Vegan Trademark standards.





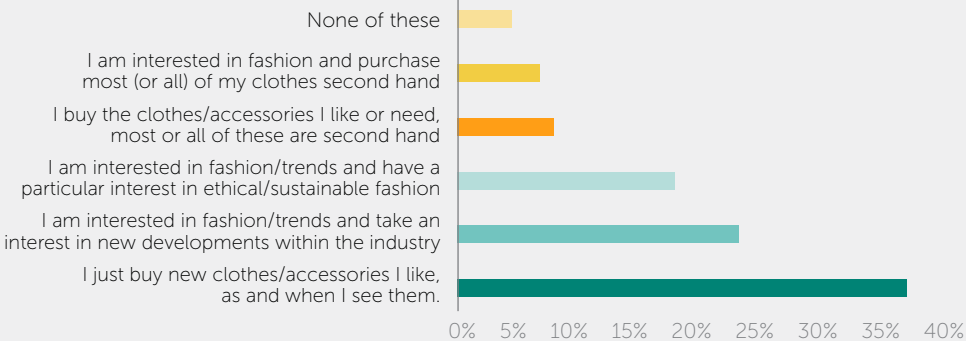
# SURVEY AUDIENCE

The sample for this research is comprised of 1,000 people from the United Kingdom who say they purchase new clothing and accessories. Those who purchase most, or all, of their clothing second hand were not entered into the survey. The sample is working age (18-64) nationally representative for gender and home region. We use surveying platform [Attest](#) as our research partner, and the research was conducted in May 2021.

## Demographics

- Gender:** Female (51%), Male (49%)
- Age:** 18-24 (15%), 25-34 (20%), 35-44 (24%), 45-54 (22%), 55-64 (19%)
- Home Region:** Scotland (7.8%), North West (11.8%), North East (4.8%), Yorkshire & Humber (8.8%), East of England (8.8%), West Midlands (8.8%), East Midlands (7.8%), Wales (4.8%), Northern Ireland (2.2%), London (12.8%), South East (12.8%), South West (8.8%)

## Please select the statement that best describes your attitude to shopping for fashion, clothing and accessories



# THE USE OF ANIMALS IN THE FASHION INDUSTRY

Non-human animals are used in many ways across fashion supply chains. The most notable reasons are for their skins, fur, feathers and even their colour. Specific figures, whether they are global or regional, can be difficult to find. Sometimes this is because the numbers are so large, as with insects used in clothing dyes, or because the industry lacks transparency. For a list of unexpected materials and processes which use products from animals, please see page 10. In addition to this, the leather industry in particular has a crossover with the meat industry, and we will take a deeper look into this on page 6.

There are also environmental factors to consider. According to the [Higg Materials Sustainability Index](#), which takes into account energy, water, chemistry and additional impacts used in material production, leather from cows is nearly three times as harmful to the environment as vegan leather, and wool is twice as harmful as polyester.



## WHAT IS COCHINEAL DYE?

A red dye that is commonly used to colour fabric, and extensively used within the cosmetics and food industries. The dye is made from crushing wingless female cochineal insects. Native to Latin America, it can take an estimated 70,000 individual insects to produce just 500g of dye.

## Types of leather

There are several types of animal-based leather\* on the market. In this report we specifically look at leather from cows (a tough material from the skin of adult cows), leather from calves (a material from the skin of cows under three years old), "exotic leather"\* (e.g. crocodile skin, snakeskin). In terms of non-animal materials we will consider plant-based leather (made from plants e.g. pineapple) and plastic leather (e.g. PVC or PU).

### CLARIFICATION ABOUT OUR USE OF THE TERM LEATHER

The Vegan Society does not support the use of the term "leather" for animal skin. However, to ensure clarity to wider audiences and for clearer comparison to vegan leathers, the term will be used throughout the report.

### CLARIFICATION ABOUT OUR USE OF THE TERM "EXOTIC" ANIMALS OR "EXOTIC" LEATHER

The Vegan Society does not support the use of the term "exotic" animals and the connotations it implies. For clarification, in this report "exotic" animals refers to animals such as crocodiles and snakes. We hope this ensures wider understanding of the report.

A fox who has been rescued from a fur farm in Poland now lives safely at a sanctuary. New to the sanctuary,

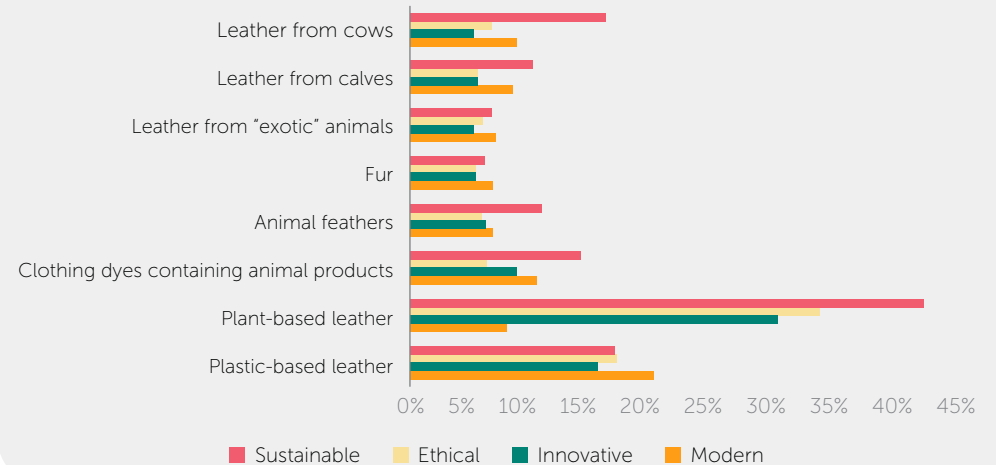
Credit: Jo-Anne McArthur / We Animals Media

# POSITIVE PERCEPTIONS

**34.3%**  
of the sample  
thought  
plant-based  
leather was  
ethical.



## Which of these words best describes the following materials?



We asked respondents to select which words they thought best described several different widely used materials within the fashion industry, and there was no limit to how many statements they could select. For consumer perception of how ethical, sustainable, innovative and modern the materials are, plant-based leather came out on top, followed by plastic-based leather.

### Plant-based leather

42.4% of our sample thought this material was sustainable, 34.3% thought it was ethical, 32.6% thought it was innovative and 30.6% thought it was modern. These were the highest percentages for all materials sampled. Turn to page 8 for a deep dive into plant-based leathers.

### Plastic-based leather

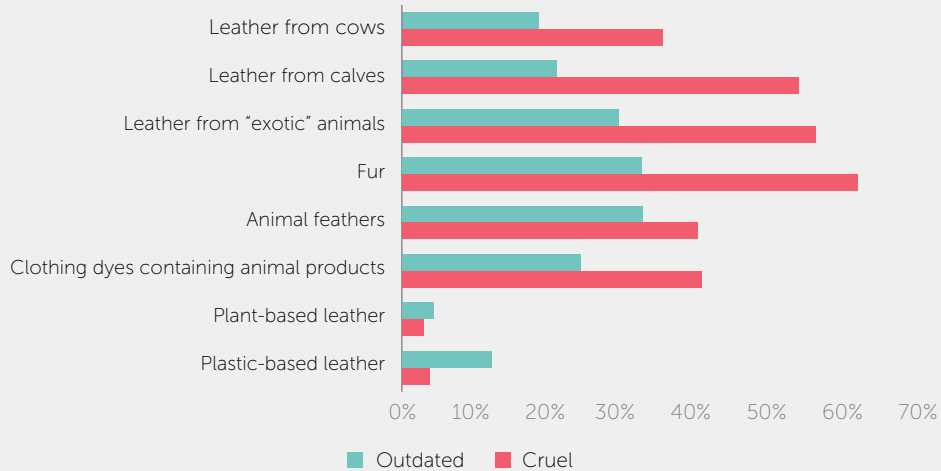
Plastic-based leathers (otherwise known as "faux leather" or "pleather") have been used across many different industries for decades. 20.9% of our sample thought plastic-based leathers such as PVC or PU were modern, 18.4% think they are ethical, 16.5% said that they were innovative and 18.3% think they are sustainable. Though these numbers are lower than they were for plant-based leathers – they beat all the animal-based leathers in terms of positive public perception.

### Animal leathers

On average, 9.4% of respondents said animal-based leather was modern, 6% said innovative, 12.2% said sustainable and 7.1% said ethical.

# NEGATIVE PERCEPTIONS

## Which of these words best describes the following materials?



### Animal-based leather

37.1% of the sample said they thought leather from cows was cruel (rising to 49.6% for those aged 18-30 n=266), and 19.7% said it was outdated. 54.3% thought leather from calves was cruel, and 20.8% said it was outdated. 57.2% thought leather from "exotic" animals was cruel, and 30.3% said it was outdated. Turn to page 6 for a deeper dive into the animal-based leather industry.

### What about other animal materials?

61.4% said fur was cruel, and 32.5% said it is outdated. 40.9% thought animal feathers are cruel, and 32.9% said it is outdated. Turn to page 7 for a deeper dive into animal fur and feathers.

40.7% think clothing dyes containing animal products (e.g. cochineal dye) is cruel, and 24.8% said it is outdated.



**57.2%**  
of the sample  
thought leather  
from "exotic"  
animals was  
cruel



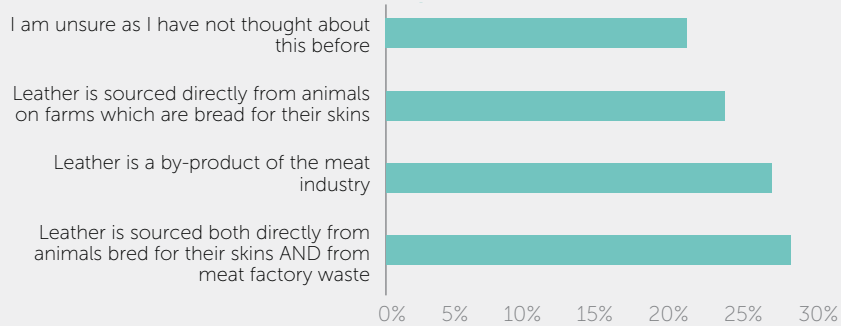
**37.1%**  
of the sample  
said they thought  
leather from cows  
was cruel (rising  
to 49.6% for those  
aged 18-30)



The skins of snakes, crocodiles, armadillos and ostriches are also used in the fashion industry.

# WHERE DOES LEATHER COME FROM?

**Leather is a material made from animal skin, that is widely used in the fashion industry. Which of the below statements best describes your understanding of how leather is sourced?**



We asked the panel to think about where they thought leather was sourced from, and their responses were fairly evenly split.

27.9% said they think leather is sourced both from animals bred for their skins and from meat factory waste. Just behind this, 27.1% said they thought leather is a by-product from the meat industry. 23.7% said they thought leather was sourced only from animals on farms bred for their skin. Worryingly, a significant 21.2% said they were unsure as they had not thought about it before.

Depending on the brand and animal used, all answers are correct. Most fashion brands will have animal welfare statements which outline their policies regarding the sourcing of animal-derived materials. In these, some will state that their leather is always sourced as a by-product of the meat industry, and this is often predated by a statement that says no animals should be harmed in the making of their fashion products. These two statements are contradictory, as we know that animals are harmed in the meat industry. Plus, the issue is not how the skin is sourced, but that the skin is used in the first place.

There are many other concerns surrounding the use of animal leather products. Marketplaces or smaller stores may not have any policies in place concerning their sourcing of animal leather products. Ultimately, it could be impossible to tell where the leather has come from, and what animal has been used.

The skins of snakes, crocodiles, armadillos and ostriches are also used in the fashion industry. These animals are often farmed for their skins, or sometimes illegally caught from their natural habitats.



# FUR AND FEATHERS

## Animal fur

61.4% of the sample said they thought that fur was cruel – the highest answer given for any material against all descriptive words.

Interestingly, these figures were higher for older respondents. For those aged 50+ (n=279), 66% said fur was cruel and 51.3% said it was outdated. Perhaps this could be because these respondents remember when fur farming was still legal in the UK. Prior to the ban, 11 “fur farms” operated in the UK and were responsible for the deaths of [100,000 minks annually](#).

Despite the legislation, animal fur is still traded in the UK market. In 2017, [£63 million](#) of fur was imported into the UK, and in the same year, £33 million was exported. This implies that £30 million worth was for UK use. But could the end be in sight? A 2020 [survey](#) conducted by Humane Society International and YouGov found 72% of Brits support a complete ban on the importation and sale of animal fur in the UK, and 93% do not wear any animal fur.

The [Fur Free Alliance](#) estimates that, globally, 100 million animals are raised and killed for their fur each year. Over the last few decades, the use of animal fur in the fashion industry has been hotly contested. Large scale campaigns (notably, PETA’s “I’d rather go naked than wear fur”) and extensive investigations into the lives of these animals has thankfully led to some positive industry change.

The British Fashion Council is taking notice, and announced in 2018 that London Fashion Week would be fur-free for the [first time](#).

Plus, many high-end brands including Versace, Prada, Chanel, Burberry, Michael Kors, Gucci, Jimmy Choo and Giorgio Armani have now gone fur-free.

## Animal feathers

Ostrich feathers are the most used feather in the fashion industry. The [British Domesticated Ostrich Association](#) states that during the 1990s, some 20,000 ostriches were being farmed in the UK. Though this has since rapidly declined, the farming of ostriches for their meat, skin, oils and feathers is still legal.

There is little up-to-date information about the feather industry in the UK – such as the value, the volumes of feathers collected, and information around imports is largely unknown. But, feathers are still widely used, both for “decorations” and for insulation.

Some assume that “duck down” is made from feathers, but this is not strictly true. “Down” is found underneath birds’ feathers; it is soft, fluffy and bouncy – making it perfect for keeping birds warm while they sleep. Unfortunately, this natural asset is exploited by the fashion industry to insulate garments such as jackets. It is also used across other industries to produce products such as duvets.

Though down is not as publicly contested as fur, the feather industry may be showing signs of decline. In 2018, it was [reported](#) that high street brands Topshop and Sweaty Betty had banned the use of feathers in their product ranges. Online retailer ASOS also do not use feathers or down on their own-label products, and encourages other brands to use alternatives.

### FUR FARMING (PROHIBITION) ACT 2000

In 2000, the UK became the first country in Europe to ban the direct farming of animals for their fur under new legislation for England and Wales, following a public consultation that found overwhelming support to end the practice. The Fur Farming (Prohibition) (Scotland) Act 2002 and Fur Farming (Prohibition) (Northern Ireland) Order 2002 further strengthen the UK’s view on this cruel industry. In June 2021, the Department for Environment, Food and Rural Affairs opened a public consultation about the present fur market in Great Britain. It is thought that the evidence gathered could help to completely ban the trading of animal fur now that the UK has left the European Union. You can find The Vegan Society’s response [here](#).

Two local councils have banned the sale of fur. [Oldham Council](#) (Manchester) was first to do so in 2018, followed by [Islington Council](#) (London) in September 2019. [Brighton and Hove](#) passed a motion on to the Policy & Resources Committee in late 2019, and we await for an update. For a list of fur-free retailers, you can visit [this link](#).

In June 2021, Israel became the first country in the world to ban the sale of fur for fashion. Though there are some exemptions, such as for “scientific research, education, for instruction and religious purposes and tradition”, this ban is a step towards a kinder world for animals with fur.



Pineapple leather by Piñatex

# PLANT-BASED LEATHER DEEP DIVE

Plant-based leathers created from several types of plant materials present an ethical, durable and sustainable alternative to animal-based leathers.

[Piñatex](#) is one of the original products on the market, having been developed in the 1990s in the Philippines. Piñatex is described as “a non-woven textile made from waste pineapple leaf fiber, suitable for use across fashion and accessories, soft interiors and automotive applications”. Piñatex is used by hundreds of brands worldwide, including many fashion brands.

Other plant-based leathers include materials made from mushroom, succulents, cactus and apple.

30.6% of the sample thought plant-based leather was modern – the highest percentage for all products categories.

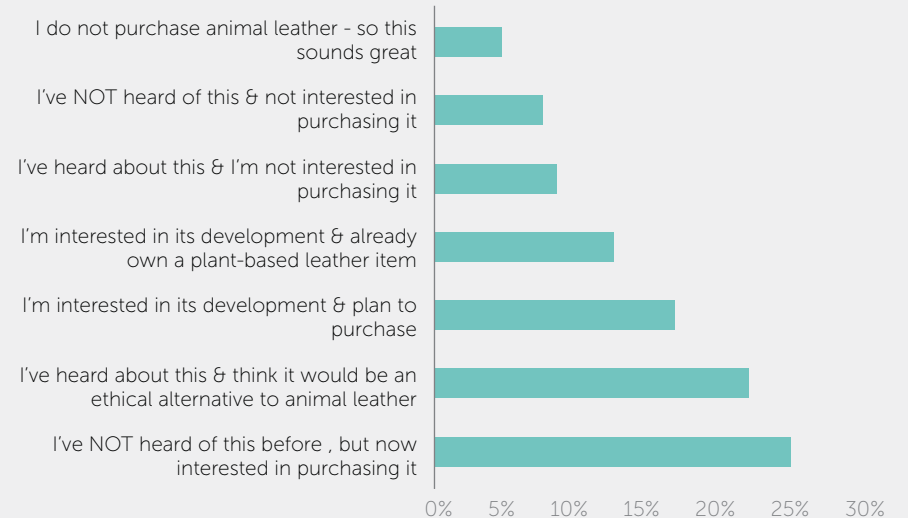
32.6% thought plant-based leather was innovative – the highest percentage for all products categories.

42.2% thought it was sustainable – the highest percentage for all products categories.

34.3% believed it is ethical – the highest percentage for all products categories.

We explained to the panel what plant-based leather was, and then asked them to select a statement that best described their thoughts.

## Which of the below statements best describes your thoughts on “plant-based leathers”?



Nearly one in four (24.8%) of the panel said they had not heard of plant-based leather before the survey, but they were now interested in purchasing it. This rose to 29.8% for respondents aged 45+ (n=410).

22.2% of the sample said that they had heard of plant-based leather before the survey and thought it would offer an ethical alternative to animal leathers.

17.1% of the sample said that they were interested in the development of plant-based leather before the survey and planned to make a purchase in the future. This rose to 22.7% for respondents aged 18-25 (n=172).

Interestingly, 13% of the sample said that they were interested in the development of the material and already owned something made from plant-based leather.

9.2% of the sample said that they had heard of plant-based leather before but were not interested in purchasing it. Additionally, 8.3% said that they had not heard of it, but were not keen to purchase it as they were happy with animal leathers.

Finally, 5% said they already do not purchase animal leather, so they think plant-based leathers sound great.

Overall, 17.5% of respondents said they were not planning to purchase plant-based leather in the future, leaving a potential customer base of over 80% of shoppers. Of these, 54.9% gave responses that directly said they were either interested in purchasing, or already owned something made from plant-based leather. Though the remaining 27.2% did not directly say they planned to purchase, they did have positive thoughts towards it.

We then asked the panel how much they would be willing to spend on an item made from plant-based leather.

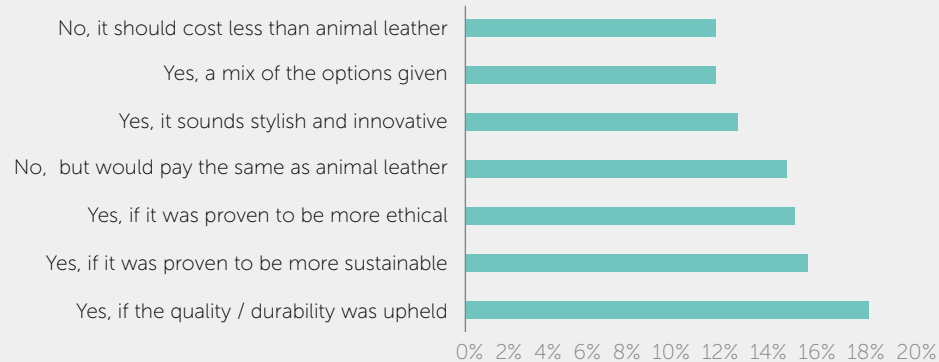
14.7% of respondents answered that they would not be willing to pay more for plant-based leathers, but they would be willing to pay the same as what they pay for animal leathers. This is encouraging as ethical fashion should not be limited to just those who can afford it.

Finally, 11.8% of respondents said that they thought plant-based leathers should cost less than animal leathers.



**73.5%**  
said yes, they  
would be willing  
to pay more for  
plant-based  
leather compared  
to animal leather

### Would you be willing to spend more on an item made from plant-based leather, compared to animal leather?



The majority of respondents (73.5%) said yes, they would be willing to pay more for plant-based leather compared to animal leathers.

Quality and durability came out as the top consumer priority (18.2%), followed by sustainability (15.7%) and ethics (15%). 12.7% of respondents gave style and innovation as their reason to be willing to pay more. 11.9% of respondents said their reason to be willing to pay more was for a mixture of the options given.

# SUPPLY CHAIN ISSUES

Creating ethical fashion can be difficult, as there are commonly many stages in the supply chain to produce one item. Though it will largely depend on the item and brand, a single item of clothing can often go through several stages of manufacturing and processing before it is ready for sale.

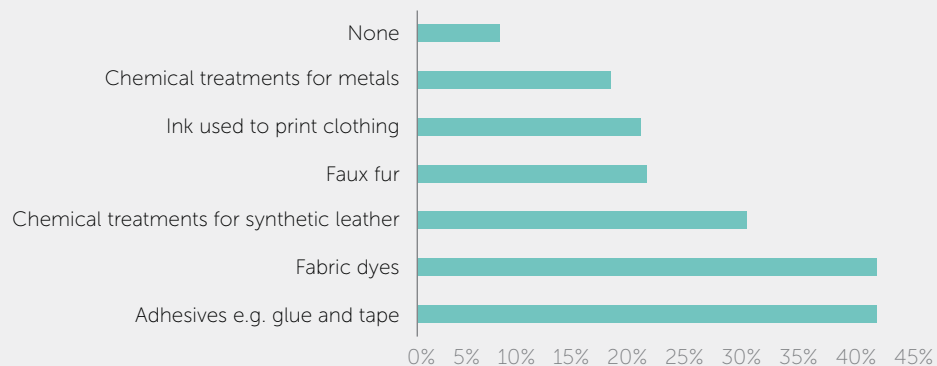
This is a key concern for the vegan fashion world, as there are many materials and processes which use products from animals, and they are not always immediately obvious.

Prime examples of this [include](#):

- Adhesives and glues – can be prepared using collagen from mammals, insects, fish, and products found in mammal milk.
- Fabric dyes – can contain a multitude of raw materials, but the main concern is pigment. Crushed cochineal insects can be used to achieve reds, murex snails for purples, or the ink sac of cuttlefish for browns.
- Synthetic leather – sometimes a finishing spray containing ground-up leather is used to give the PU a more ‘authentic’ look, making it no longer suitable for vegans.
- Faux fur – an [investigation](#) by Humane Society International found several British stores selling items labelled as “fake fur”, when in fact the items were real animal fur. Worryingly, all stores had anti-fur policies in place.
- Printing ink – can contain animal bones, “gelatine” from animal hooves or shellac, which is made from the secretions of lac beetles.
- Metals – to avoid rusting, metals undergo an anti-corrosive stage during production. This can include using an anti-corrosive agent to coat the metal which may contain oils and lubricants derived from animal fats.

We asked the panel to select the materials and processes in which they would expect to find products from animals.

## Within the fashion industry, in which of the following materials or processes would you expect to find products made from animals?



Respondents most often correctly selected adhesives (42.2%) and fabric dyes (42%) as the material in which they expected to find animal products.

Interestingly, this was then followed by chemical treatments for synthetic leather (26.6%). Synthetic leathers are widely used in the fashion industry as they are cost effective to produce and are seen as a fail-safe alternative to animal leathers. However, with little regulation in this area, there is no way to tell if synthetic leather is completely vegan without a third-party certification.

Faux fur came next, with 26.5% of respondents saying they expected to find material from animals, presumably real fur. This is concerning and could suggest a lack of public awareness surrounding what faux fur is made from or where it comes from.

26.3% of respondents correctly selected ink used to print clothing as a material where they expect to find animal products.

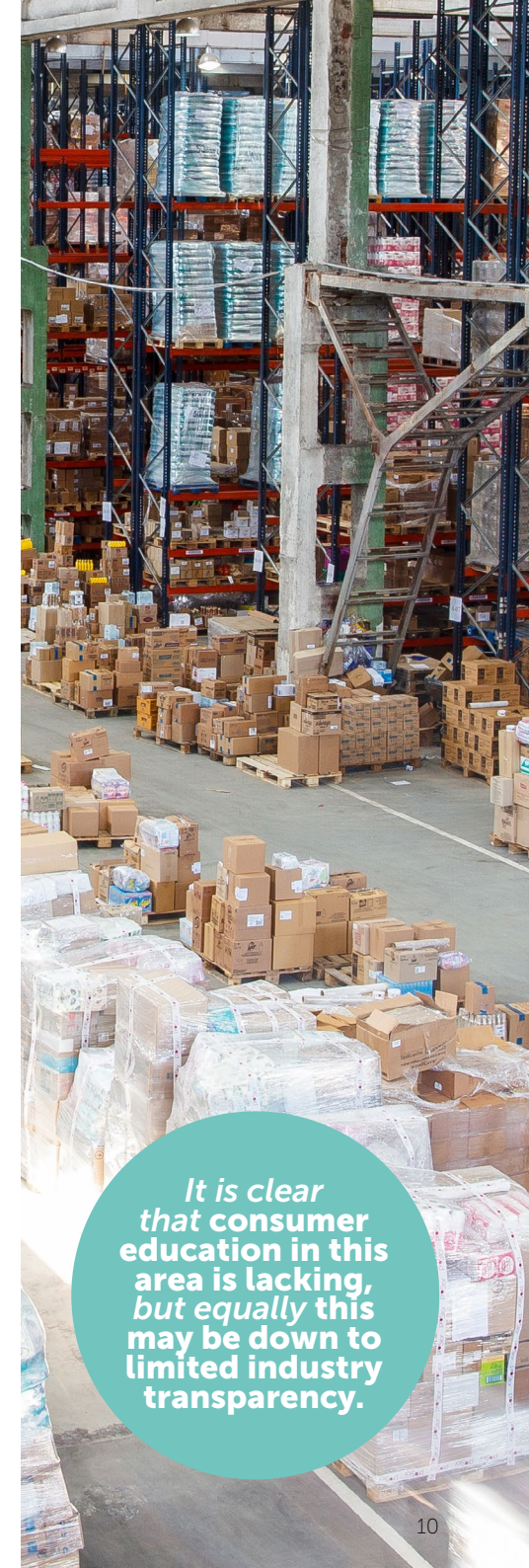
Chemical treatments to treat metal was selected by 18.3% of respondents.

Finally, 8.3% selected “none”.

Though at a glance these figures seem high – particularly with 26.5% of respondents expecting to find real fur within faux fur – just 3.4% of respondents selected all six options, which is ultimately the only correct answer.

It is clear that consumer education in this area is lacking, but equally this may be down to limited industry transparency.

In January 2020, the British Retail Consortium – a trade association for UK retailers – published their [Voluntary Guideline on Veganism in Fashion](#). In short, the document states that: “the term “vegan product” is classified as clothing, textiles, accessories, footwear etc. that contains no animal-derived components. This includes animal-derived materials, adhesives and chemical ingredients used in manufacturing such as dyes, pigments or inks”. At present the guidelines are voluntary, but this does show a step in the right direction.

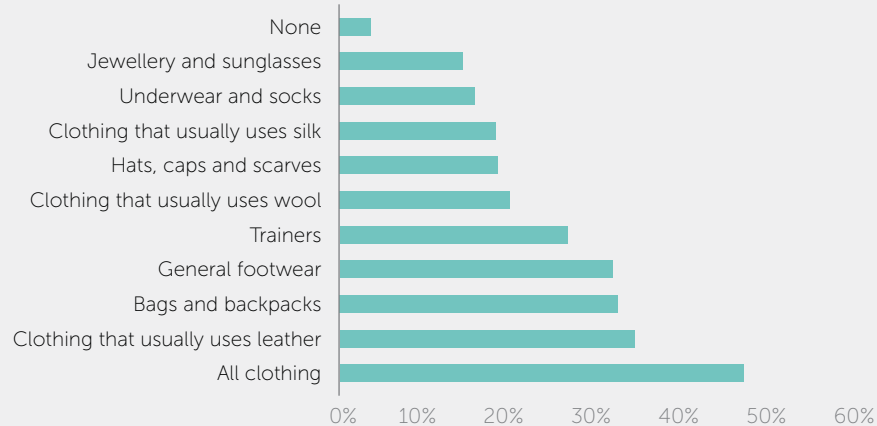


*It is clear that consumer education in this area is lacking, but equally this may be down to limited industry transparency.*

# WHAT VEGAN FASHION DO SHOPPERS WANT?

We explained to the panel that products from animals are commonly used across the whole fashion supply chain, and that without third-party certification, it is hard to guarantee clothing and accessories are vegan even if they claim to be. We then asked respondents which categories they would like to see more vegan verified fashion in.

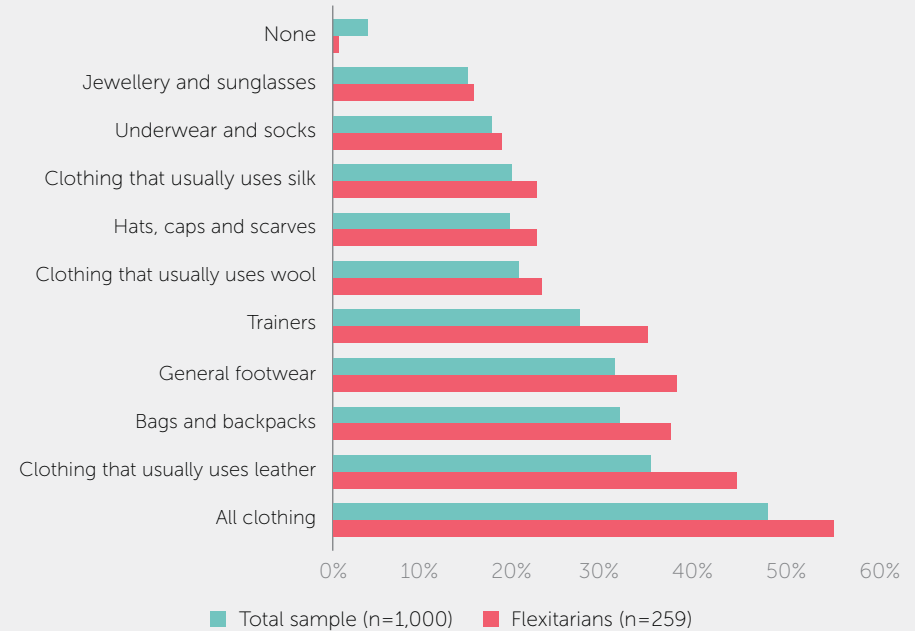
## In which specific fashion categories would you like to see more third-party certified animal free / vegan fashion?



Nearly half of the panel (47.4%) said they would like to see more vegan verified fashion across all clothing ranges. Interestingly it was those who identified as flexitarian (actively reducing their consumption of products from animals) who felt the most strongly about this, with 54.5% of flexitarians (n=259) selecting this option. In fact, this group over-indexed in every category given, indicating that changing diets can influence kinder fashion choices. Older respondents were also keen to see more vegan fashion – with 54% of those aged 55 or older (n=190) selecting this option.

Consumer demand for vegan leather materials also scored highly. 34.9% of the panel said they wanted to see more vegan verified fashion for clothing that usually uses leather, such as jackets and boots. The next three highest scoring categories also usually use leather from animals. Bags and backpacks came next, with 32.1% of respondents saying they wanted more vegan options. General footwear (boots, heels, sandals etc.) and trainers also scored highly, with 31.8% and 28% of the sample respectively wanting increased vegan options. Once again flexitarians over-indexed in these options. 44.4% of flexitarians want more vegan leather clothing, 37.4% want more vegan bags, 38.1% want more vegan footwear and 34.6% want more vegan trainers.

## In which specific fashion categories would you like to see more third-party certified animal free / vegan fashion?



Clothing that usually uses wool (e.g. jumpers) came next, with 20.6% of the total sample saying they would like more vegan verified alternatives. Certified vegan hats, caps and scarves was selected by 19.5% of the respondents. Vegan silk alternatives came next, with 19.4% of respondents selecting this option. Underwear and socks were selected by 17.5% of respondents. Finally, vegan verified jewellery and sunglasses was chosen by 15.6% of the panel.

**47.4%**  
said they would like to see more vegan verified fashion across all clothing ranges.





# VEGAN TRADEMARK

The [Vegan Trademark](#) has been running since 1990, it is the oldest vegan certification scheme in the world, and helps shoppers identify products that are completely free from animal ingredients.

The first vegan fashion items registered with the Vegan Trademark were by [Freerangers](#) in 1999, who registered twelve footwear and accessory items between 1999 and 2002. In the last few years, interest in the Vegan Trademark has exploded and the fashion world has taken interest.

At the time of writing (June 2021), the Vegan Trademark has nearly 4,500 fashion products registered under our robust vegan standards – nearly double the number that were registered at the start of 2021. This includes accessories, bags, footwear, clothing and sportswear from all-vegan, high street and luxury brands. The most common material that is registered with the Trademark is PU. In 2020, the team also registered pineapple leather and rice husk shoe soles.

## Milestones in the UK market

2019

[New Look](#) became the first high street retailer in the UK to register with the Vegan Trademark, with a collection of 431 products. This makes up 60% of their available footwear and bags, with plans to keep switching out their products over the years.

July 2020

Soon after, [Gola](#) released a variety of trainers registered with the Vegan Trademark.

[George at ASDA](#) announced that all of their ladies bags are now registered with the Vegan Trademark. They also stock a number of vegan rucksacks, shoes and other apparel (plus, they were the first supermarket to register food and drinks with the Vegan Trademark back in 2017!)

Autumn 2020

[Superdry](#) registered a vegan shoe range with the Vegan Trademark.

2021

[Kurt Geiger](#) launched their Spring/Summer range with 55 styles registered with the Vegan Trademark. Also in 2021, [Eurofins Chem-MAP](#) registered with the Vegan Trademark – this is the first testing and auditing service specifically developed for testing apparel and footwear as vegan.

We have many more exciting registrations in progress, and you can always check out new vegan verified products on our dedicated Instagram page – [@vegantrademark](#).

# CONCLUSION

The fashion industry is in a prime position to create a kinder world for animals. From the high-street to the high-end, retailers and brands are already showing signs of commitment and consumer demand is only increasing.

Whether it is for ethics or economics – it is time to embrace vegan fashion.

**If you are a brand interested in providing vegan-friendly fashion, or want trusted, vegan-verified credentials**, you can contact our Vegan Trademark team on [trademark@vegansociety.com](mailto:trademark@vegansociety.com).

**If you are a fashion buyer and want more vegan-verified fashion**, you can contact brands and let them know the Vegan Trademark is here to help. Showing demand increases the chances of making a kinder fashion industry a reality.

If you require more information about this report, would like more information about the data, or if you are interested in personalised research for your business or research collaborations, please contact [insights@vegansociety.com](mailto:insights@vegansociety.com).

