

INNOVATION CASE STUDIES: 13 STARTUPS

BOOSTING THE SUSTAINABILITY AGENDA FOR FASHION BRANDS



THE ROCKET
REPORT

2022

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— INVESTING IN INNOVATION

THE ROCKET REPORT: INNOVATION CASE STUDIES

13 STARTUPS BOOSTING THE SUSTAINABILITY AGENDA FOR FASHION BRANDS

Year 2022 anticipates that **sustainability** focused **fashion tech startups** will become even more prevalent as their solutions advance and become industry-wide ready. However, with so much choice and a plethora of avenues that fashion brands can go down to solve the sustainability crisis, it can be confusing to select the right focal points. *Does one choose to solve it at the consumer level by creating more awareness and experiences that educate the fashion shopper, or, is the main priority to tackle it at the design, production and supply chain level?* This white paper aims to shed light on the possibilities of piloting with **innovative startups**.

Now is more important than ever to highlight the potential possibilities of integrating technologies that are boosting sustainability agendas. A **Loomish** study from 2021 revealed that fashion executives see that solving sustainability issues is a high priority and that it is essential for businesses to integrate it within their mid to long-term goals (*Luxforward, 2021*).

Therefore, it makes it even more pertinent that as we look to creating strategies for 2022 and beyond, that **startups are also seen and understood prior to making strategic decisions**.



THE ROCKET REPORT: INNOVATION CASE STUDIES

13 STARTUPS BOOSTING THE SUSTAINABILITY AGENDA FOR FASHION BRANDS

Loomish and **Beyond Form** have partnered together to create this white paper to help fashion industry professionals, executives and brands understand how startups can be integrated into core business operations. Thus, boosting **sustainability** and **innovation** activities. Both organisations meet with dozens of startups per year to scout for their various programs. Beyond Form has found that over two thirds of startups that apply for support are either tackling the sustainability crisis head on, or, are ingraining sustainability as a core business value. This ambition to reconfigure the fashion system to be better for the planet is something that industry leaders can tap into not only for inspiration, but for direct unification to make their businesses better.

Within this study you will find 4 categories:

- *Metaverse & Digital Fashion*
- *Waste: Recycling & Upcycling*
- *Traceability & Transparency*
- *Future Retails & New Ownership Models*

Each category has **case studies from startups** that are creating solutions centring on each theme. The startups have provided insights on how they have worked with fashion and non-fashion corporations to deliver pilots with tangible outcomes and meaningful ROI. *The goal of this white paper is to illuminate what possibilities innovative startups are able to bring to the table, the technologies that are being deployed and exactly how fashion brands can think about integrating such solutions into their businesses.* In addition, highlight the work that ambitious founders are doing to create the future of fashion.

We hope that you enjoy this white paper and find points of useful inspiration and insight. If you would like to find out more information about any of the startups then feel free to contact the **Loomish** or **Beyond Form** teams.





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1. The industry

How do we future-proof fashion? The word from the industry

Jelena Tasic Pizzolato, Managing Director, Lifestyle-Tech Competence Center

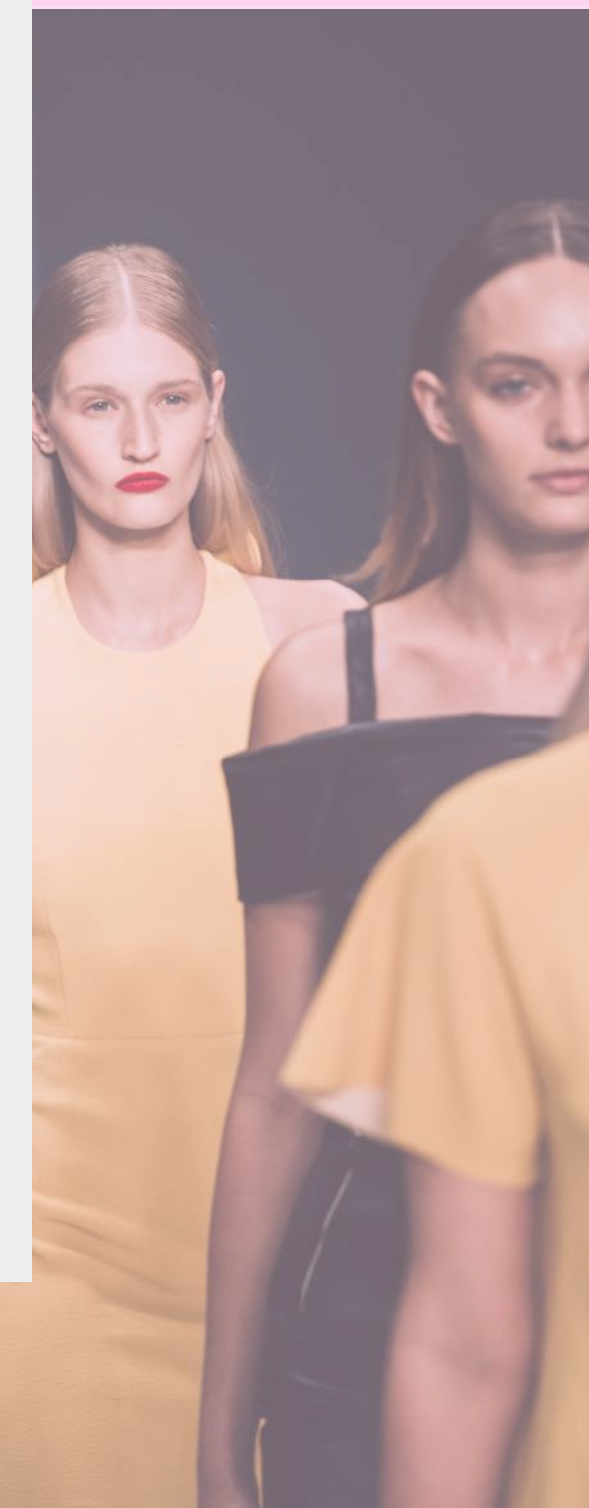
The arduous market conditions in which the **fashion and luxury brands** found themselves over the last couple of years have required a titanic effort. Arguably to an extent larger than ever before, fashion houses today are forced to juggle their **short-term survival tactics and long-term strategy redefinition** on the fly.

There have been new layers of complexity added into the market landscape.

Next to their decade-long race after the moving target of **digital transformation**, brands have recently been heavily affected by two societal shifts: the change of consumer lifestyles due to the pandemic and – undoubtedly the one with further-reaching consequences – the shift in the consumer mindset and value system. Namely, an average consumer is more aware of **ethical** and **environmental** causes, which poses a completely different set of expectations onto the brands.

In our recent luxury fashion executive survey,¹ a dozen **European luxury executives** estimated the mid-term priorities for their brands as follows: delivering better customer experiences, deploying new distribution channels, and decreasing brands' environmental impact. Those are closely followed by addressing specific customer targets, such as Chinese and Gen Z customers, while **virtual fashion** and second-hand luxury were given priority by several specific brands.

¹ What's next for Luxury: innovation challenges and opportunities for the Luxury sector., September 2021. Loomish and Cognizant. <https://www.cognizant.com/us/en/luxforward-switzerland>





Every year, we at **Loomish** get in touch with hundreds of brilliant **Fashion-Tech start-ups** through our **open innovation programs**, connecting fashion brands with the innovators. What we have noticed over time is that there is a significant **gap** between brands' stated needs for innovation and the number of projects they effectively run with leading-edge start-ups. In the same survey, the participants revealed the reasons behind that gap.

When it comes to the collaboration between brands and start-ups, the main **roadblocks** appear to be the lack of the internal structure on the brand side, lack of their time and budget for such projects, as well as the challenges of tech integration. Interestingly, over 50% of our respondents admit that their organisations are not internally structured in order to efficiently deploy innovation, which contributes to the slower pace of innovation adoption overall.

Innovation goes beyond technology: a proof of concept with a start-up rarely puts a brand in a plug-and-play situation.

For anything to be launched, monetised and adopted successfully, the right organisational, market and societal conditions are needed. Leveraging on those is what allows for real innovation to take place. *What makes a difference is how a given technology is integrated into the brand's organisational ecosystem, embraced by its people across the organisation and put in service of the customer.*

The **fashion innovation landscape** is very complex, but there is a silver lining to the present challenges. Historically across sectors, it is from real needs and urgency that the best innovations and breakthroughs emerge. All things considered, that moment has probably arrived for fashion.



2. STARTUPS VIEW

How can startups & corporates work together better?

Peter Jeun Ho Tsang, Director, Beyond Form

For corporates, working with startups is not easy and vice versa. Why is this?

‘Value chain improvement and digitisation’ (BoF, 2018 - 2021) is often cited as a key challenge for fashion executives to overcome, but in many cases, there is a shortfall in the number of **successful innovation pilots that are trialed**. According to research on corporate innovation, the innovation blockers are often long development times, uncertainty around the best ideas to trial, and lack of coordination (Coplex, 2021).

From what **Beyond Form** has observed from its portfolio of fashion tech startups trying to work with corporates, lack of an innovation strategy and urgency to push forward with new pilots internally within brands is a major struggle. There is a long **lead time of between 6 – 12 months with scoping conversations** before any key terms of the pilot come to fruition. This goes against the very nature of a startup where speed and agility are key for survival. Therefore, brands should hire **innovation managers** who are equipped with the right skills to set and deploy an innovation strategy that is more akin to rapid testing and deployment.





This will allow radical change to happen versus **smaller incremental changes** to avoid upsetting the existing system too much. For startups, finding the right key decision makers is not enough, many fashion brands need to be shown what to do. Therefore, **executing a ‘show’ sales strategy** based on **tangible innovation objectives** would help to progress conversations.

Innovation by nature is risky. Therefore, startups need to quell a **corporate’s fear of risk** as much as possible to avoid pilots being discontinued early on. Having a **strong operations manager** within a startup team will help to avoid the lack of coordination or seem to be too messy for the corporate to work with. As many fashion brands do not have an innovation team (or a very small one if they do), a startup able to step into those shoes will help to facilitate a smooth piloting phase. From **Beyond Form’s** portfolio observations, startups that approach collaborating with the client more intimately on average achieve a higher pilot success than startups that merely wish to push a solution to close a sale.

Ultimately, *fashion brands need to see innovation as a longer-term investment for startup activity to be meaningful.* Currently less than 1% of sales go back into R&D (*Fashion For Good, 2020*), which is an incredibly low number for the size of the problems that the fashion industry presents such as **sustainability** and fighting the **climate crisis**. The following section highlights some of the startups that are managing to rollout successful enterprise solutions.





3. CATEGORIES & CASE STUDIES

1. Metaverse & Digital Fashion
2. Waste: Recycling & Upcycling
3. Traceability & Transparency
4. Future Retail & New Ownership Models



METAVVERSE & DIGITAL FASHION

Digital fashion in the last few years has enjoyed a huge upsurge in adoption. From **3D digital creation** at the designer level, digital fashion e-commerce stores, through to luxury skin drop collaborations in **video games**. In this category we take a look at the startups that are feeding the metaverse, the shared virtual world, with their solutions that utilise technologies such as **AR & XR, 3D design, and NFTs**.

AnamXR™

AnamXR, www.anamxr.com, Los Angeles, California, USA

Contact: Irene-Marie Seelig, CEO and Co-founder, irenemarie@anamxr.com

Technology / Business area:

Metaverse, NFT, Blockchain, Avatars, Real-Time Experiential Marketplace

Services:

AnamXR is a first-of-its-kind real-time metaverse platform that makes it easy for brands to launch their own immersive, digital stores and social experiences that are accessible on mobile and desktop, no headset or download required. AnamXR's white-labeled enterprise solution enables unique ways to display, story-tell and sell physical and NFT collectables in gamified, multi-dimensional and high-fidelity worlds built on proprietary technology, cloud infrastructure, blockchain and Unreal Engine. Since launch in December 2020, esteemed luxury brands, respected startups and top NFT artists have increased conversion, built strong community growth, and offered true NFT utility by using the AnamXR platform.

Clients list:

[PANGAIA](#), [FARFETCH](#), [BURBERRY](#), [EBIT™](#), [FVCKRENDER](#), [PHNTM](#)

Case study | FARFETCH

The problem

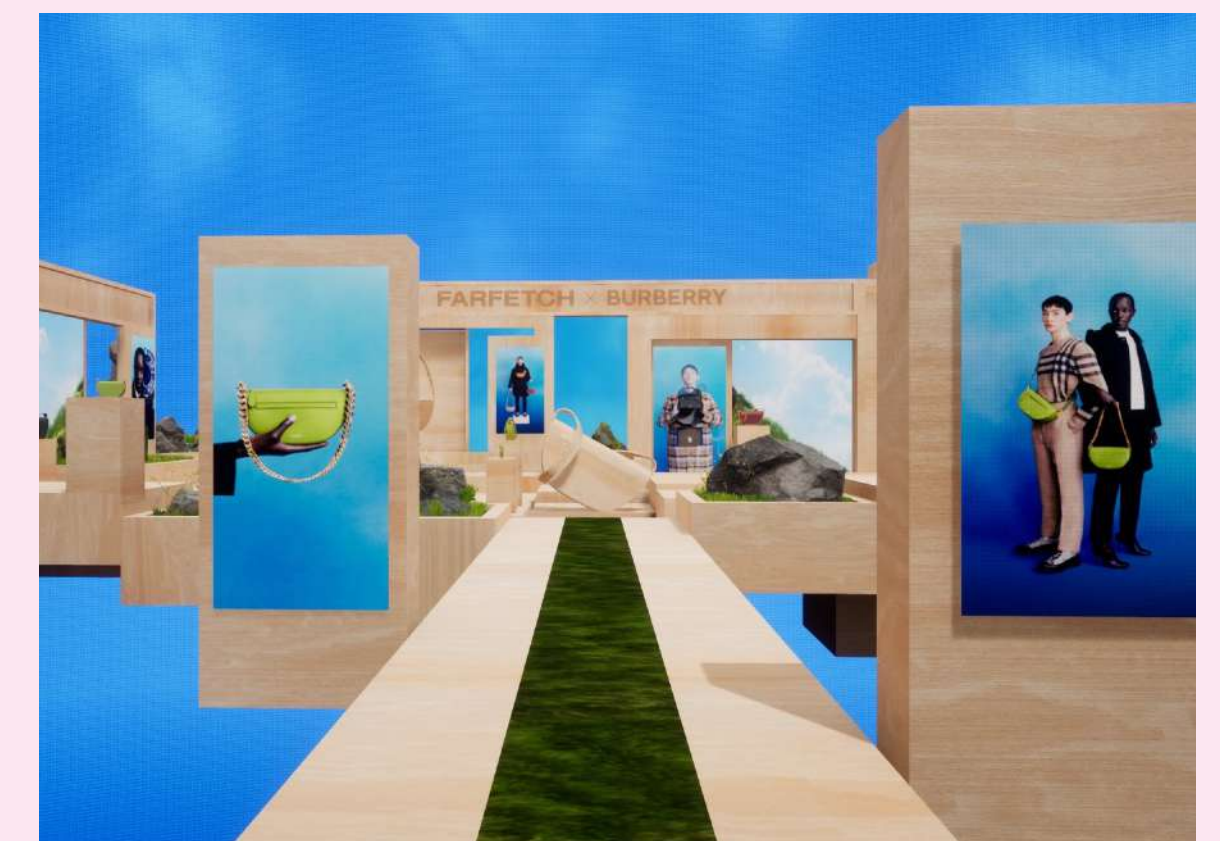
Leading global platform for luxury fashion, FARFETCH, objectives are to evolve experiential retail, establish foundations of luxury's new retail, and team's identify an uplift in sales of the Burberry Olympia Bag with halo on overall bag category. "The open innovation team goal is to work with superstar startups and founders to push the boundaries in fashion retail to create a new blend of physical, immersive digital experiences on the Farfetch platform."
- FARFETCH

The solution

AnamXR worked with FARFETCH to launch their immersive retail experience "Store in the Sky" for the release of Burberry's Olympia Bag. The AnamXR platform enabled FARFETCH to merge the Metaverse, experiential retail and e-commerce through the development of a fully immersive and shoppable 3D experience in 15 languages and real-time rendering that is accessible on mobile and desktop, no headset or download required. We provided FARFETCH access to virtual retail world building and streaming at scale for their users to learn the stories behind their partner, Burberry's Olympia handbag.

The achievement

The business impact of this campaign was increased customer experience, conversion and retention. Assessing all of AnamXR's clients data, on average user sessions increased up to 700%, session lengths increased by 2000% and conversions increased up to 600%.



AnamXR™

AnamXR, www.anamxr.com, Los Angeles, California, USA

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Case study | EBIT™

The problem

Simon Whitehouse founder of EBIT and CEO at Eco Age, goal was to launch EBIT's "Yellow Trip Road" to provide awareness to mental health while also releasing exclusive NFTs to support the cause.

The solution

AnamXR worked with EBIT to launch their immersive NFT experience "Yellow Trip Road" for the release of EBIT's bumper jumper NFTs. The AnamXR platform enabled EBIT to develop a fully immersive and shoppable 3D experience in real-time rendering that is accessible on mobile and desktop, no headset or download required. We provided AnamXR access to virtual retail world building and streaming at scale to bring awareness to mental health while selling NFTs that 10% of sales go to the charity American Foundation for Suicide Prevention (AFSP.org)

The achievement

EBIT sold out it's NFT collection in 30 minutes.





Lalaland, Amsterdam, The Netherlands

Contact: Harold Smeeman, Cofounder - harold.smeeman@lalaland.ai

Technology / Business area:

Metaverse, AI, Avatars, Synthetic Humans, Fashion eCommerce

Services:

Lalaland is on a mission to make the web a more diverse place. By automating the entire traditional photography process, we help fashion brands showcase their collections using a diverse variety of models which actually look like their customers. These AI-generated model imagery can be used in 4 use cases: Website PDPs, Re-Marketing Campaigns, On-Site Personalization and end-to-end Digital only process, for on demand manufacturing. (The Metaverse)

Clients list:

Zalando, Wehkamp, Otto International, Stieglitz

Case study

The problem

For one of the largest fashion re-sellers in the Netherlands - 2 Million of their unique weekly website visitors had a massive problem of feeling under-represented whilst shopping online. As a result the Global Retailer experienced missed customer acquisition opportunities and high return rates from consumers.

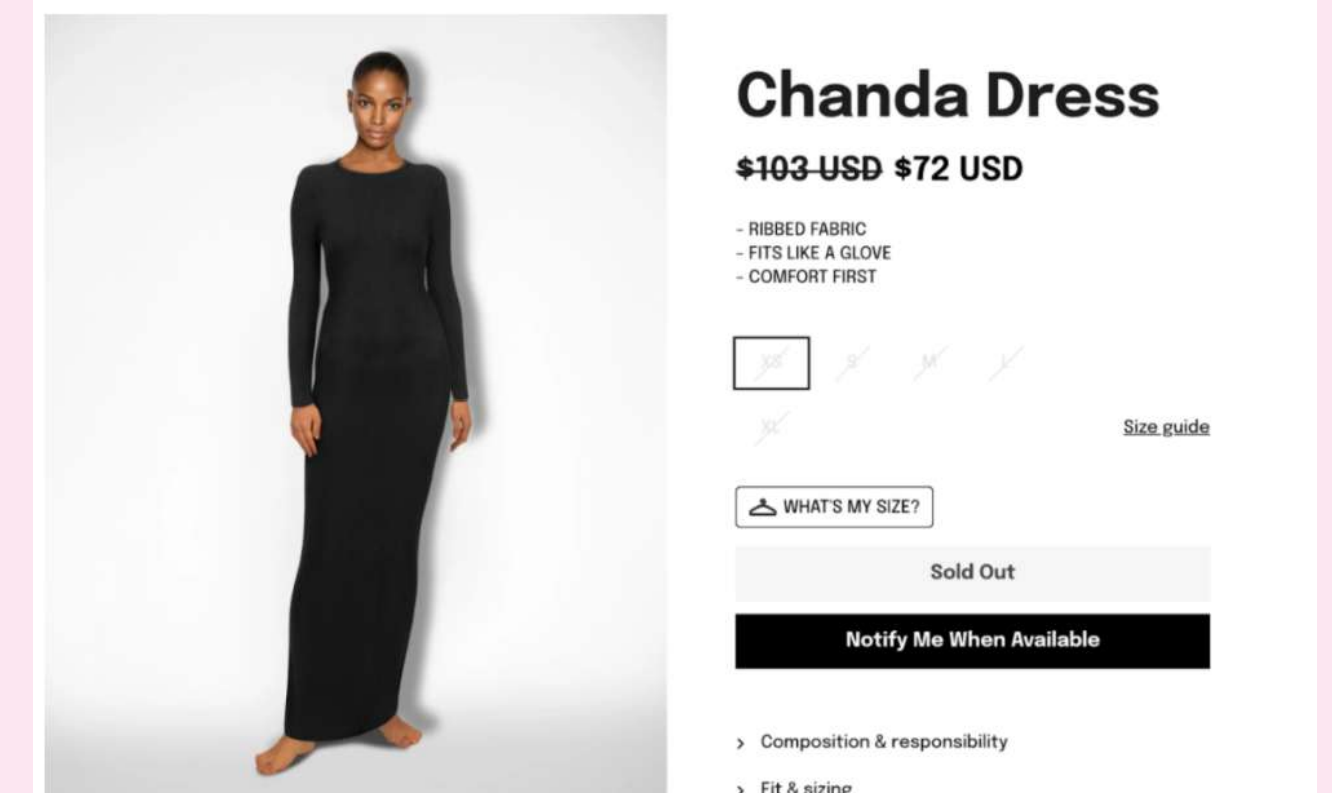
The solution

To solve this Lalaland used AI to create synthetic humans. More notably they enabled the retailer to showcase their collection and each product item on a variety of diverse models most optimally to help their consumers make a purchasing decision. As a result, the retailer saw instantly uplifts in sales and reduction in return rates measured against traditional photography.

Lalaland's platform effortlessly generates models of different ethnicities, ages, and sizes with over 5 pose variations, offering a high level of flexibility allowing brands to customise models according to their consumers' hairstyles and body shapes: hourglass, apple, triangle, pear, and rectangle. Next, a highly efficient workflow combines on-mannequin product shots with AI-generated model imagery. The result is realistic, ready-to-publish model shots at scale, created in a fraction of the time required by traditional model photography through a self service platform.

The achievement

- Increased Conversions (CTR, ATC)
- Increased Attributed Revenue.
- Increased Order Value and Basket size.
- Increase in User Experience (heatmap on filters, nps and retention rate.)
- Reduction in cost on traditional photography.
- Reduction in return rates.



LODE

Lode, New York, USA

Contact: Leetee Wang, Co-founder, CEO
Leetee@shoplode.io

Technology / Business area:

Augmented Reality, Virtual Shopping Marketplace, Digital Fashion, Virtual Try-on, Virtual Boutiques

Services:

Lode is an immersive mobile marketplace built as an online concession model – taking a commission per transaction.

They offer virtual boutique design and product digitization, to be integrated onto our immersive marketplace – which hosts unique shopping and full body augmented reality try-on experiences.

Clients list:

Confidential luxury streetwear and high fashion brands ready to launch on the app in early 2022.

Case study

The problem

Leading French Fashion Brand ~ € 10 mn. Revenues, needed a way to attract and interact with younger consumers who have lost interest in traditional media. They wanted global consumers to have access to their unique store experience and have their flagship store incorporate a digital element that included the ability for consumers to try and style their clothes in augmented reality.

The solution

In 90 days, Lode created a virtual boutique reflecting design themes already present in the brand's flagship store, as well as added unique digital elements and interactive features (a customisation game and AR clothing try-on).

They then onboarded the brand's virtual store onto our mobile marketplace using the customisation game as a promotion and onboarding tool.

The achievement

After beta-testing the experience with 50,000 users, Lode found that incorporating a gaming element was key to users downloading a new app and reducing friction of learning to interact with a new kind of shopping experience.

80% said they would share the experience with at least one friend. Product pre-orders increased 5x after the try-on options were added.





WASTE: RECYCLING & UPCYCLING

The **fashion value chain** creates waste along the entire value chain and is one of the worst offending industries. However, there are now many startups tackling this issue from the raw materials level right through to the deadstock at the manufacturing and retail levels. This category unpacks startups that are utilising completely new processes through to delivering **innovative services & business models.**



AltMat

[AltMat](#) , Ahmedabad, INDIA

Contact: Shikha Shah, Founder, shikha@altmat.in

Technology / Business area:

Alternative Textiles, Textiles manufacturing, Agriculture waste, Bio-materials

Services:

AltMat helps brands reduce the environment footprint while building sustainable materials for the future. They create plug and play materials that brands can adopt within their existing supply chains.

Their materials lie at the intersection of holistically sustainable, inclusive and high performing, while also making sure that it is viable and scalable to use. For instance Altag – alternative material from agricultural residue solves the dual problems of agriculture waste and textile pollution. This material can be consistently and recurrently used across the collections and seasons. The versatility of the fibers allow to play with feel and aesthetics and performance across home, fashion and technical textiles.

Clients list:

Part of Fashion For Good, Beyond Form, won Circular Innovation Award and will present the innovation in Virtual Reality as Circular Fashion Summit, presented at Sankalp forum as a changemaker, did rounds of trials with manufacturers at industrial scale by constantly improving the materials, working with fortune 500 brand etc. We have launched the commercial scale factory with supply chain in place. Several active POCs, bounded by NDAs.

Case study

The problem

With the rising awareness about climate action, brands are willing to adopt more sustainable solutions. Materials amongst other innovation spaces have been identified as an impactful part for going truly holistically sustainable. However, adopting new sustainable materials often needs to be in line with practicalities of business including factors like feel, functionality, supply chain compatibility and scalability. When it comes to natural fiber, while they have the most preferred natural environmental lifecycles, the options are only lesser, scalability and supply chains more fragile.

The solution

For some specific clients (currently undisclosed), we are solving this problem with a combination of our tech. platform, scale up dynamics and supply chain management. Our key technology platform takes agricultural waste from food, industrial and medicinal crops and upgrades it into a rich natural fiber called Altag. Altag weaves in environmental sustainability Inclusivity and performance in a plethora of applications like interiors, fashion, non-woven, paper packaging, bio-composites etc.

We maintain the natural structure while reducing water, chemical and energy footprints. The fiber has a rich natural feel and performance. It is viable and the fact that we have been bale to scale to commercial production in less than two years stands as a testimony to technology's scalability.

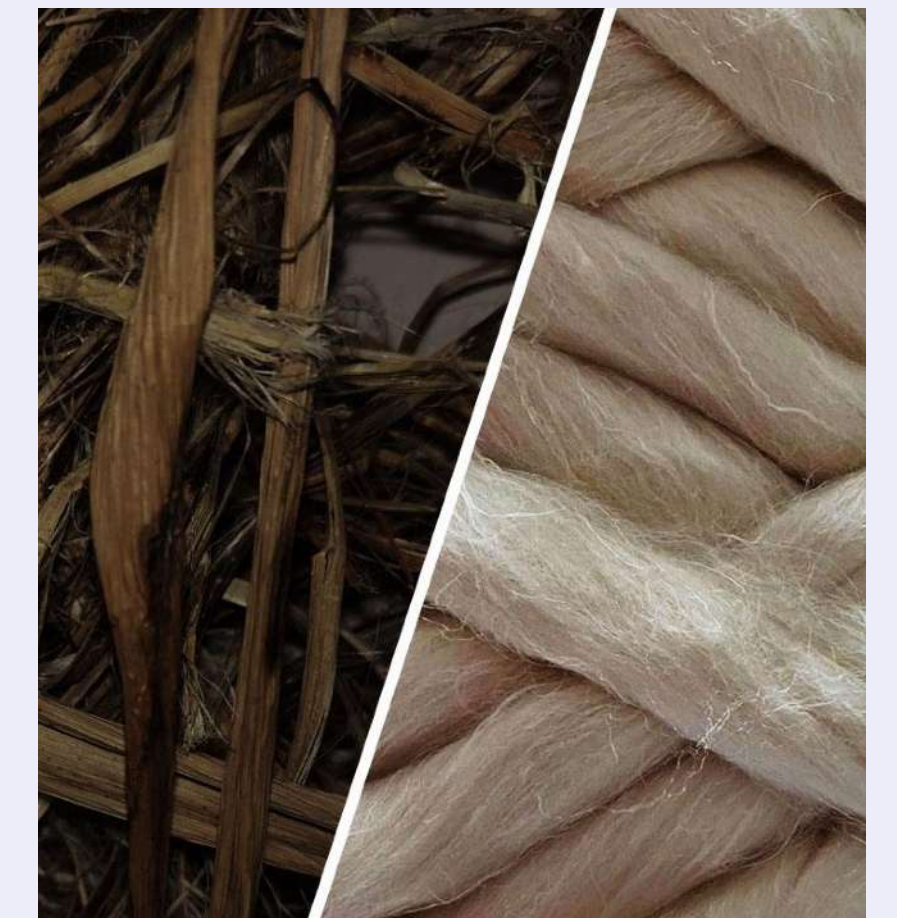
The achievement

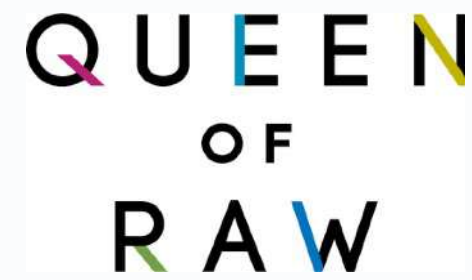
Current projects with clients are verifying the following achievements:

Our solution innovates business models: we've built strong building blocks of the supply chain, execution, and industrial-scale technology. This allows us to scale the production lines closer to different agriculture hubs and textile hubs which help us build decentralised production systems backed by robust supply chains and no issue of overproduction.

We help contributing to sustainability in a tangible way: our internal LCA done with help of Fashion For Good for cradle to gate i.e. seed to fiber our blue water consumption is less than 1 liter/kg of natural fiber i.e. less than 1% of other fibers. Our energy consumption, acidification and eutrophication is a small fraction of other traditional fibers of all kinds.

Our solution is functional while reducing costs: the feel is rich like natural fiber and not like polyester. Our fibers are **30-40% more affordable** than the closest.





Queen of Raw, New York, USA
Contact: Stephanie Benedetto, CEO,
stephanie@queenofraw.com

Technology / Business area:

Software, Marketplace, E-Commerce, Blockchain, Machine Learning/AI, Sustainability, Circular Economy, Resale, Recycle, Supply Chain, Textiles, Predictive Analytics

Services:

After leading the market with its front-end marketplace for textile resale (ranked top 3 globally for keyword “deadstock fabric”), Queen of Raw built back-end software called Materia MX (materiamx.com).

Through the cloud, enterprise brands/retailers can participate in circular economy profitably and at scale. They take action on unused inventory based on real-time insights and end-to-end automation. Recently Queen of Raw completed a software integration with SAP for access to inventory data and partnered with MIT Solve to advance Queen of Raw’s proprietary algorithms measuring impact and ROI.

Clients list:

Luxury to fast fashion, including Fortune 500. Publicly aligned with H&M (New York Circular City Initiative), thredUP, Cartier, LVMH, Nike (Launch.org), and Kering (Wildlife Friendly Enterprise Network).

Case study | Global Footwear Brand

The problem

A leading global sports footwear and apparel brand is sitting on unused inventory (raw materials and finished goods). Traditionally, this inventory remains in warehouses collecting dust or is burned or buried, causing financial, supply chain, regulatory, and reputational harm.

The solution

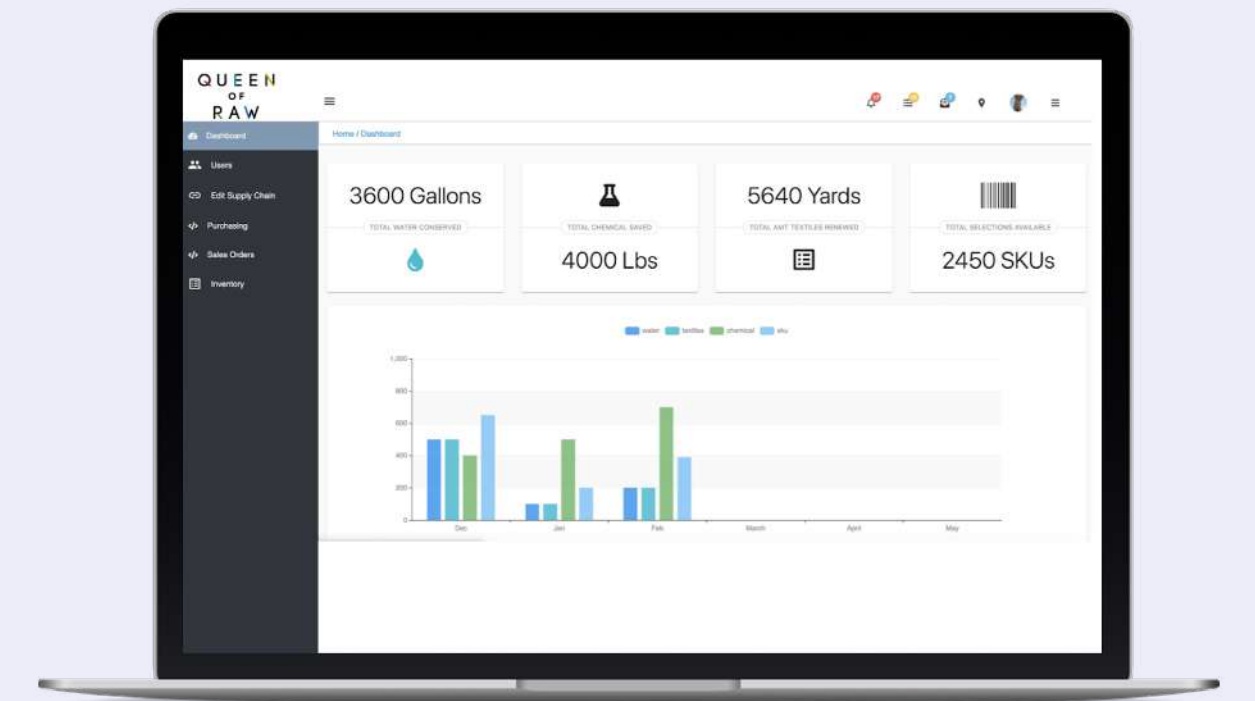
Queen of Raw’s software engine, Materia MX, manages unused inventory for the enterprise brand. With a click, they can redistribute, resell, recycle, and donate this inventory across Queen of Raw’s trusted global network, including through queenofraw.com.

Based on the actions the brand takes, Queen of Raw’s software engine, Materia MX, measures the environmental and economic impact while growing their sales and customers. This elevates the company’s bottom line, brand loyalty, supply chain efficiency, and customer experience. And Queen of Raw’s engine, Materia MX, takes care of it all for them (from payment processing to international shipping logistics).

The achievement

The brand reduced their material waste and costs while growing sales and reaching new customers. ROI was realised in Y1 and Queen of Raw and the enterprise brand are now expanding the scope of the partnership. The customer also saw 3x the conversion rate in their online direct-to-consumer business just by talking about the work they were doing with dead-stock.

Collectively Queen of Raw has saved \$1B+ gallons of water, which is enough clean water for 1.4 million people to drink around the world for 3 years.





PAC srl – [The Paac](#) - Caserta, Italy

Contact: Alessandro Franzese, CEO & founder,
a.franzese@thepaac.com.

Technology / Business area:

Fashion tech, leasing, rental, personal styling, AI, pre-loved fashion

Services:

PAC sets up and manages subscription fashion websites. They have a direct B2C channel (The Paac) and partner with brands to distribute brands' products. In addition, they set up and manage fashion leasing platforms for leading brands that want to enter directly into the rental, personal styling and pre-loved fashion space.

Clients list:

Confidential (the first B2B website will be launched in early 2022 – leading Italian fashion brand with over € 200 million turnover)

Case study | Leading fashion brand

The problem

A leading Italian Fashion Brand (over € 200 million in revenues) was looking at new trends in fashion consumption but did not have the right skills to enter the market and lacked innovative approaches to deal with an increasing sustainability demand from the market.

The solution

PAC supports its client in defining the strategy to successfully enter and capitalize on market opportunities in the rental, pre-loved and personal styling market. Indeed, PAAC has gained direct experience by launching and managing its leasing platform (www.thepaac.com) which is active in those markets.

On top of the consulting support, PAC realizes a dedicated website for its client that is in line with the brand strategy and positioning and that includes all of the crucial technical features that are important to offer the best experience to website users. Finally, PAAC manages the website maintenance and development, marketing, customer service, logistics and garment refurbishment. The service is well-rounded and it includes weekly and quarterly reports that provide a clear picture of the results achieved and help define the strategy's development.

The achievement

The brand is able to tackle the sustainability demand by offering a service that lets its customers wear over 100 garments a year at a fraction of the environmental impact and without the need to completely restructure its production and supply chain structure.

Moreover, the website realized by PAAC enhances the ability of the brand to differentiate its offer from competitors, expand its customer base and directly capitalize on new market opportunities.





TRACEABILITY & TRANSPARENCY

The advent of **blockchain technology** has enabled the fashion supply chain to work towards a more transparent and traceable approach. Although still in its infancy, many fashion brands are exploring various methods from **RFID threads & powders, digital passports and authenticated supplier data**. This category explores startups that are utilising these advancements to create a more digitally connected supply chain.

.arianee

[Ariane](#), Paris, France

Contact: Pierre-Nicolas Hurstel, CEO & cofounder,
christelle@arianee.org

Technology / Business area:

web3, NFT, blockchain, digital twin, digital assets, circularity

Services:

Ariane offers end-to-end web3 solutions for brands. The Ariane solution allows brands to tokenize, distribute and leverage NFTs.

The Ariane protocol makes it possible to associate each luxury product with its own unique, unforgeable NFT (digital passport). It opens up a secure and trusted communication channel between brands and owners.

Clients list:

Breitling, Richemont Group, Paris Fashion Week, Louis XIII, ba&sh, Patek Philippe, Panerai, AZ Factory, Mugler, March Lab, Nivose, RSVP

Case study | ba&sh

The problem

“The second-hand market will have a fantastic impact on the sustainability issue our industry is facing. It also represents a great opportunity for us to connect with a ba&sh community we are not currently in touch with.” Pierre-Arnaud Grenade, Global CEO of ba&sh

The solution

The Ariane enables ba&sh to offer its consumers the chance to give their past purchases a second life. In one click and directly from ba&sh’s website (www-ba-sh.fr) consumers are able to sell their items. Each item resold is allocated a digital identity certificate, registered on a blockchain and generated by Ariane. This certificate brings trust and efficiency to the transaction offering a simple and secure solution for both sellers and buyers, fully respectful of their personal data. The resell process is handled via one of ba&sh partners’, Reflaunt’s circular technology.

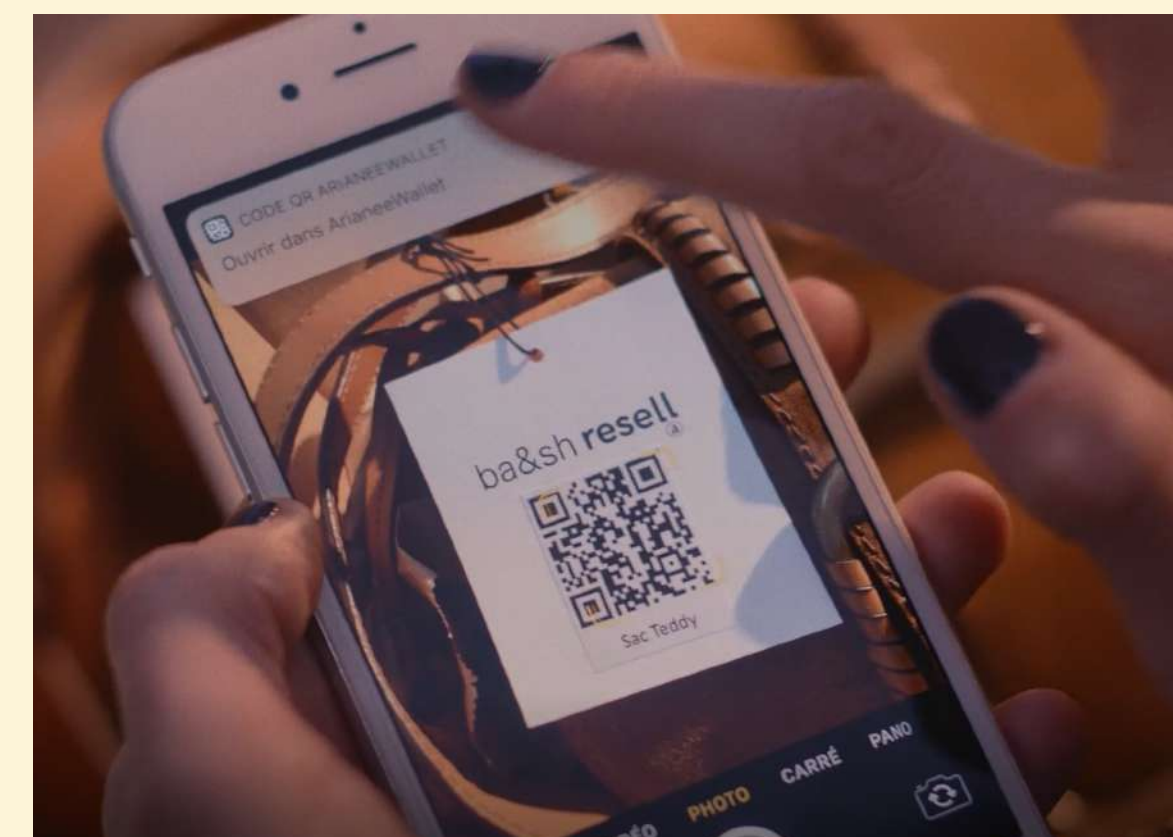
[Discover the customer journey in a video](#)

[Discover the customer journey in slides](#)

The achievement

“The solution is state-of-the-art for the authentication process of luxury products and enables our brand to talk to the secondhand hand buyer with a dedicated & GDPR compliant channel, making our resell service a useful tool to map our community in its entirety.” Pierre-Arnaud Grenade, Global CEO of ba&sh

References: [Meet ba&sh CEO Pierre-Arnaud Grenade / NFTalks EP1: Uncovering new possibilities for fashion resale with NFTs - The Ba&sh story](#)





Aware™, Amsterdam – The Netherlands

Contact: Koen Warmerdam – koen@the-movement.com

Technology / Business area:

Claim validation platform, physical tracer, public blockchain, web3, nft, circular economy

Services:

Restore trust in the textile industry. Aware™ is a claim validation platform. We validate sustainability claims of textile products, by making true data available.

Clients list:

Xindao, Solo Group, Kings of Indigo, Schijvens, Bestseller Group

Case study | Xindao

The problem

Problem in the textile industry: new consumer generation expects fashion brands to deliver a contribution to a sustainable society. They demand reliable products that they can trust, offered with as much transparency as possible. Therefore traceability is a necessity. But, It's very difficult to prove that final garments are really made of genuinely sustainable materials because the real connection between 'the original material' and 'certificates' is unguarded. Greenwashing is a hidden risk for every sustainable fashion brand. In the specific case of Xindao, a customer challenged Xindao to prove that the final product was made from recycled materials.

The solution

We bring a true story, by combining tracer- and blockchain technology. The Aware™ tracer is added to the original sustainable raw materials as a unique fingerprint. This tracer is scannable with inline sensors throughout the journey of the material until final products. At the same time a 'digital twin' of the same original material is being created on the Aware™ digital platform and registered on public blockchain, storing all information of the product, facility impact savings, social compliance, etc. The digital twin is following the physical materials. At the end, each product has a digital passport with true data directly from the blockchain regarding its environmental footprint.

The achievement

100% validated claims.

Xindao (Launching customer): Aware™ is embedded in 6% of the collection, 15% in terms of revenues.





Circularise, The Hague, The Netherlands

Contact: Phil Brown, PhD, VP Business Development & Strategy, phil@circularise.com

Technology / Business area:

Supply chain traceability & transparency software, SAAS, blockchain, circular economy,

Services:

Circularise’s mission is to accelerate world’s transition to a circular economy. They are disrupting an industry by changing how companies trace their products and materials across complex supply chains and share information about them, enabling sustainable practices on an unprecedented level.

Clients list:

Porsche, Covestro, Domo Chemicals, Stanley Black & Decker, Arcelik, Municipality of Amsterdam, Aware (Their system is powered by Circularise).

Case study | Porsche

The problem

Increasingly, car makers are asking their suppliers to provide full traceability through the supply chain. Still, getting provenance and material composition information across supply chains is extremely hard. This has to do with the inherent **complexity of supply chains**, as well as **concerns around trust, privacy, and confidentiality** among material suppliers. In addition, today companies share information through self-reporting and paper-based systems - a lengthy PDF exchange - which is inefficient, not scalable, and susceptible to fraud.

The solution

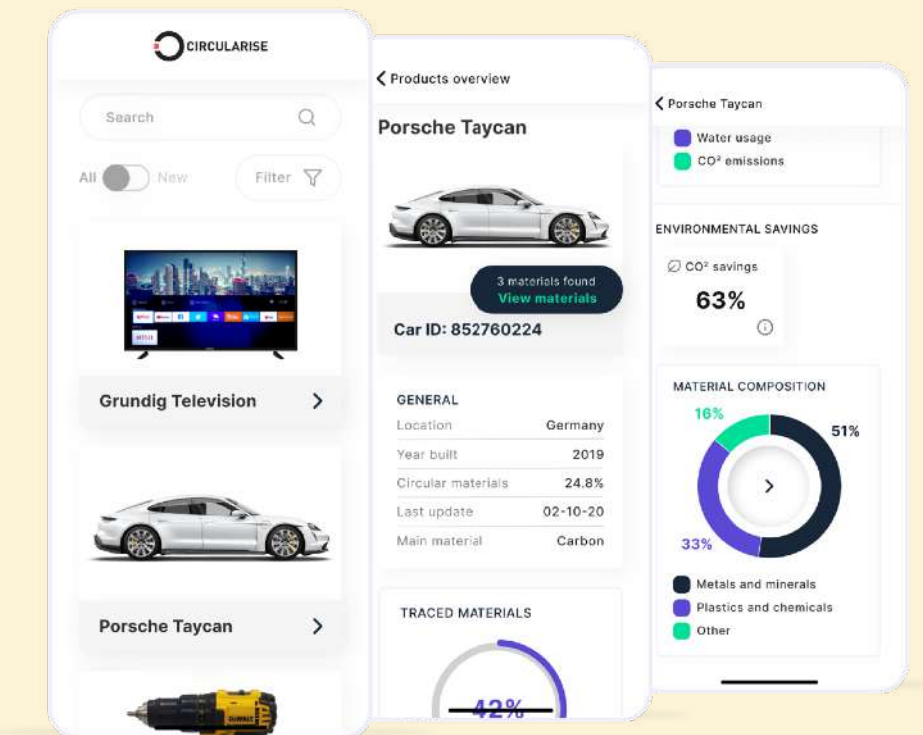
Circularise blockchain SAAS solution **improves traceability, enables digitalisation, and guarantees the chain of custody** for all supply chain players in the automotive industry. This significantly improves supply chain transparency, which is what the industry needs to become more sustainable and drive the transition to a circular economy.

Companies are able to better understand their supply chain. Their system provides access to 1) **material information**, 2) **product origin**, 3) and **environmental impact assessment data**. Through these features, companies are able to use this data for 1) **cost reduction**, 2) **reporting**, and 3) **regulatory compliance**.

The achievement

As a supply chain transparency & traceability provider, in the most recent project with Porsche we enabled the traceability of plastics and metals on blockchain to ensure the use of sustainable materials in Porsche cars.

By digitizing materials Circularise was able to create a digital thread through the whole supply chain, enabling material traceability, tracking the CO2 footprint and other sustainability metrics like water savings.





MyLime, Bologna, Italy

Contact: Elena Moglia, CEO, elena@my-lime.com

Technology / Business area:

Digital passport, blockchain, luxury goods, NFT, metaverse, Web3 and Digital twin.

Services:

MyLime is a blockchain-based tracking platform for luxury goods. MyLime patented technology allows the creation of the digital passport of the product. The information of its entire lifecycle is tracked, including pictures, production videos, maintenance contracts, and more. MyLime solves the authentication and counterfeiting problem while creating stronger loyalty connections between brands, dealers, and customers. MyLime can also create an NFT to which the digital passport is linked. In this way, entering the Metaverse is easier. A direct correlation between the physical asset and the digital one can, in fact, grant ownership and authenticity in these virtual spaces.

Client list:

Colnago, Saint-Gobain

Case study | Colnago

The problem

“We have been looking at the security provided by blockchain technology to give our customers the confidence to know that the frame they are buying is authentic and to demonstrate the chain of ownership forever. We will also announce other functions based on blockchain with the new year.” - Manolo Bertocchi, Head of Marketing Colnago.

The solution

MyLime developed an RFID tag that is inextricably linked to the bike frame and grants access to the information in the bike's digital passport through a smartphone app that is linked to the blockchain. When the frame is sold to a new owner, the transfer of ownership can be managed with MyLime's certified process.

The transparency offered by MyLime's blockchain solution will lend absolute traceability and will ensure the bicycle's value over time. Furthermore, Colnago and MyLime evaluated the various blockchain technologies that respect sustainability paradigms and have chosen one among those available and reliable that best limits the use of intensive computing resources for block validation.

The achievement

- Management of warranty activation, registration of ordinary and extraordinary maintenance and recalls with APP push notification.
- Association between product and components serial numbers in the digital passport to make quality controls and stock reduction.
- Product's traceability.
- Monitoring and control of the new and second hand market through transfer of ownership.
- Perpetual relationship between company and owner.





FUTURE RETAIL & NEW OWNERSHIP MODELS

The **recommerce market** is set to reach \$77bn in market value within the next 5 years (ThredUp, 2021) and is currently outpacing the growth of traditional fashion retail. This consumer appetite paired with greater **consumer awareness** is creating a vibrant space for startups tackling the issue of overconsumption. This category looks at startups from white label solutions through to standalone services solving the throwaway culture.



[Recurate, Washington D.C, USA](#)

Contact: Iman Allie, Director of Growth,
iman@recurate.com

Technology / Business area:

Resale, Recommerce, SaaS, Retail Technology

Services:

Recurate is a tech-enabled resale service that empowers brands & retailers to establish their own integrated resale platforms directly on their e-commerce sites.

Their platform is a scalable solution with a low barrier to entry that allows brands to use resale to simultaneously drive revenue growth, boost sustainability efforts and grow engagement in resale.

Clients list:

Outerknown, Amour Vert, Rachel Comey, Mara Hoffman, Peak Design, Spyder, Re/Done, La Ligne, Womance, Tradlands, Brass, HyerGoods, Lacausa, Looptworks, Minaal, Nora Gardner, Sister Katie, Tara Lynn.

Case study | Brass

The problem

Since 2014, Brass has designed high-quality clothing for modern women. Their online Facebook forum, The Brass Guild, was built for a community of like-minded women, drawn together by their values and style. Unexpectedly, this grew into a popular space for not only sharing experiences, but also for buying, selling and trading pre-owned Brass apparel. The popularity of these peer-to-peer transactions became difficult to manage and the Facebook group was overwhelmed by customers trying to buy and sell pre-owned Brass products.

The solution

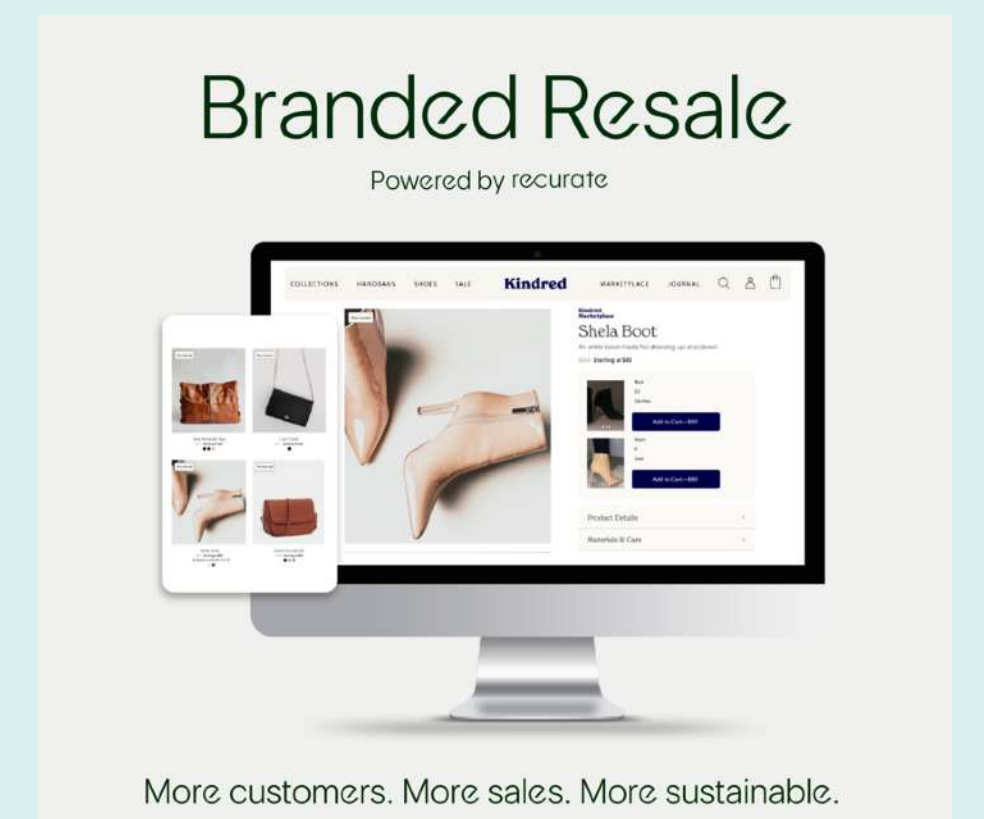
Inspired by this behavior, Brass's goal was to find a way to redirect this behavior onto a branded platform, offering their customers the same sophisticated experience when shopping pre-owned as they had when shopping new.

Recurate's solution was to build a peer-to-peer resale marketplace directly onto the Brass online store, giving the brand the ability to bring customers back to the site - boosting customer loyalty, re-engaging lapsed customers and attracting new shoppers through resale.

The achievement

The Brass Exchange is in its first year, and the early results are extremely encouraging. Since launching the resale platform in November 2020, Brass has found their resale platform to be an exceptional customer acquisition tool and an endorsement for the quality of their products, as resale demonstrates that their products are built to last multiple sales. Additional highlights include:

- 28% growth in pre-owned transactions since launch
- Roughly 22% of pre-owned buyers are new to the brand
- 12.4% of total sales were attributed to resale in just the first 8 months, and rising.





Reflaunt, London, UK

Contact: Felix, CCO, felix@reflaunt.com

Technology / Business area:

Resell as a service, SaaS and recommerce technology.

Services:

Reflaunt builds tailored resale ecosystems around the brands they partner with. Reflaunt equips brands and retailers with resale ecommerce and tailor-made branded marketplace technology and operations solutions as well as access to its largest global network of more than 27 resale marketplace partners and more than 50 million second-hand customers.

Their mission is to build a world of positive consumption allowing brands to enter with efficient circular models and motivate customers to see fashion's long-lasting value, thereby extending the life of a product and providing invaluable opportunities to re-engage with their customers.

Clients list:

NET-A-PORTER, Harvey Nichols, Balenciaga, H&M, COS, Zalora, Ba&sh, Ganni, Monnier Freres, Axel Arigato.

Case study | Harvey Nichols

The problem

Laura LARBALESTIER, Fashion Director at Harvey Nichols said; "At Harvey Nichols, we recognise the global shift away from fast fashion and towards shopping more sustainably. We're thrilled to be exclusively partnering with Reflaunt, to offer our customers a circular model of consumption to help part ways with luxury items and in return, receive credit to spend back in store."

The solution

Harvey Nichols' customers are now able to resell not just bags, but any luxury piece in their closet, and earn up to 80% back of the original price, in the form of a direct bank transfer or Harvey Nichols shopping credits.

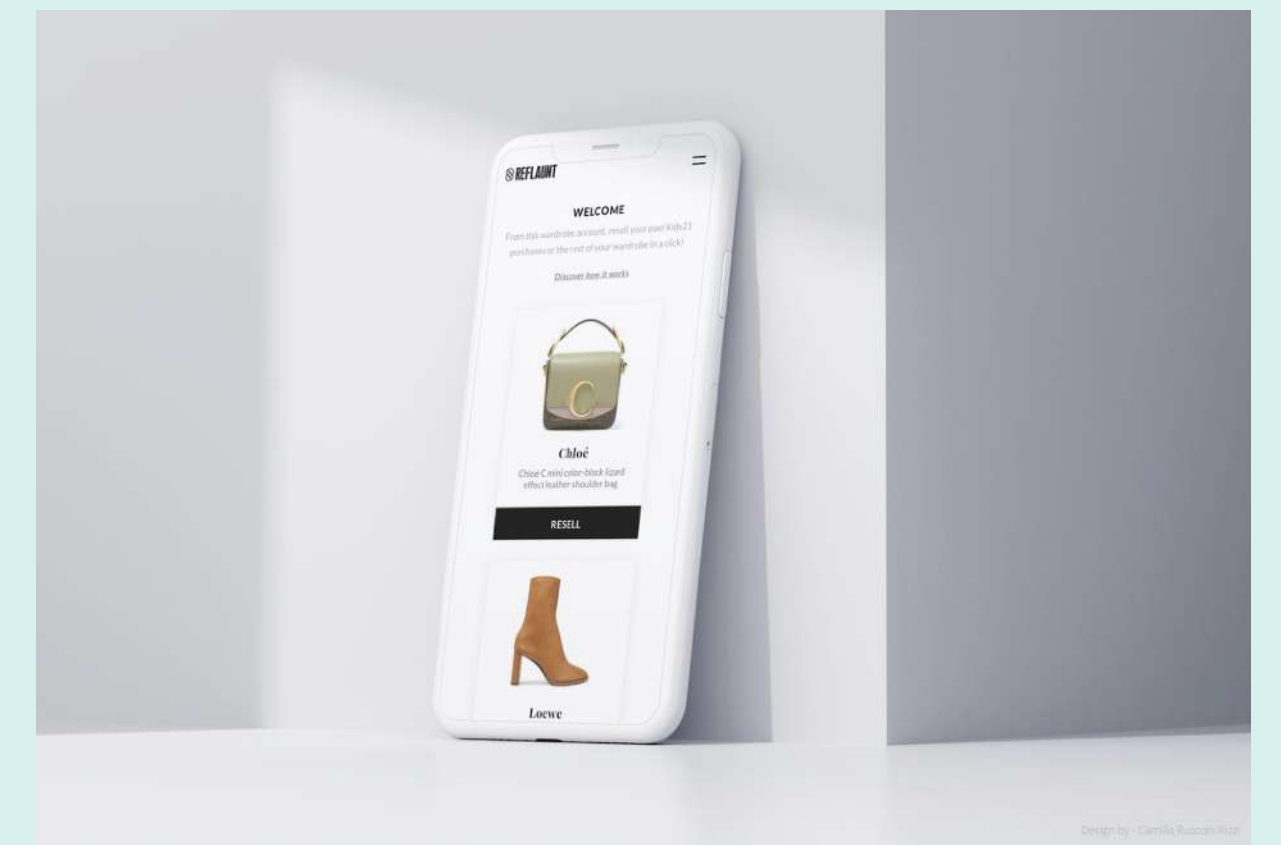
Harvey Nichols' prestigious luxury shopping experience is now enhanced with a hassle-free way to give a second life to past purchases that benefits both the planet and customer's pockets.

Customers can choose between a pick up at home or drop off at one of the Harvey Nichols' selected store. Once the pieces are collected, Reflaunt takes care of the rest.

Reflaunt provide the digital interphase to manage the resell service as well as end to end operation support (professional photoshooting, listing curation, AI-based optimal pricing).

The achievement

- 3.4 Items sold per seller
- 65% items sold within 4 months
- 75% Sellers choose shopping vouchers
- 2.2x Top-up on voucher value





Save Your Wardrobe, London, United Kingdom

Contact: Vedika, Head of Partnerships,
vedika@saveyourwardrobe.com

Technology / Business area:

Software as a Service

Services:

SYW's mission is to guide users on how to reconnect with the content of their wardrobe and make the most of it, ultimately, encouraging them to buy less and better.

SYW wants to build a global marketplace for management and maintenance of wardrobes, guiding like minded individuals to make better choices and care for their wardrobes in a conscious way.

Clients list:

Zalando, others can't be disclosed

Case study | Zalando

The problem

Zalando - Their customers have a high wardrobe turnover which means that they buy new and dispose of their clothes very quickly which is not aligned with their circularity goals. They want to re-engage with their customers especially the younger demographics to care for their clothes and repair them in order to extend the life of their garments. Care and repair services are not yet digitised or accessible for time-poor individuals.

The solution

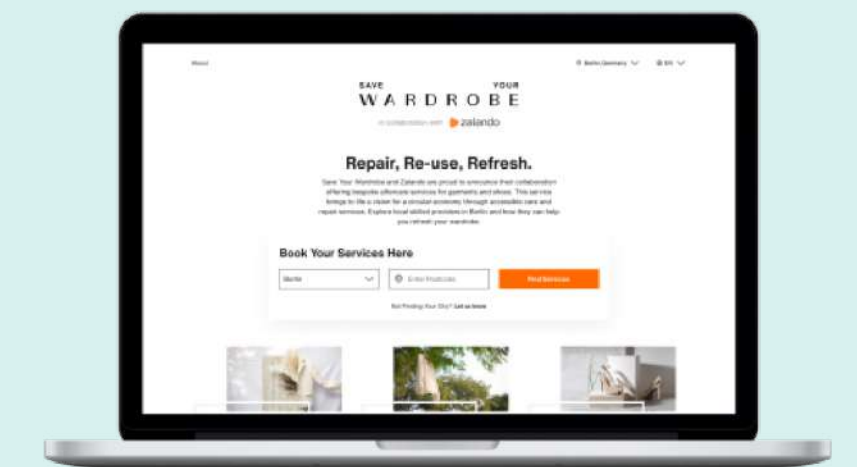
SYW have locally vetted and onboarded a range of aftercare service providers in Germany to enable online booking of services through standalone platform for Zalando's customers.

By entering their postcode on the platform users can easily find service providers near their location and begin booking the service. Using computer vision and image recognition, with a photo of the item, the platform can automatically pre-fill details about the garment sent for service. Within a few seconds the booking is complete and service providers receive the order on their backend platform infrastructure, another one of SYW's proprietary technologies. This order management platform enables communication between provider and customer to facilitate the service. The entire process is tech-enabled and streamlined; one of the first of its kind for multi-service booking from local providers globally.

The achievement

The main achievement is enhancing sustainability goals and reaching the target to extend the life of 50M garments".

This proprietary tech is also an enabler; enhancing customer experience through digital booking, making services more accessible than ever before. Save Your Wardrobe pride themselves on the model as the service ecosystem is built primarily of small, local business such as local tailors who currently rely upon manual processes and struggled during the pandemic to stay operational. By providing them with the backend infrastructure to enable on line bookings, they can acquire many more customers and streamline efficiency within operations.



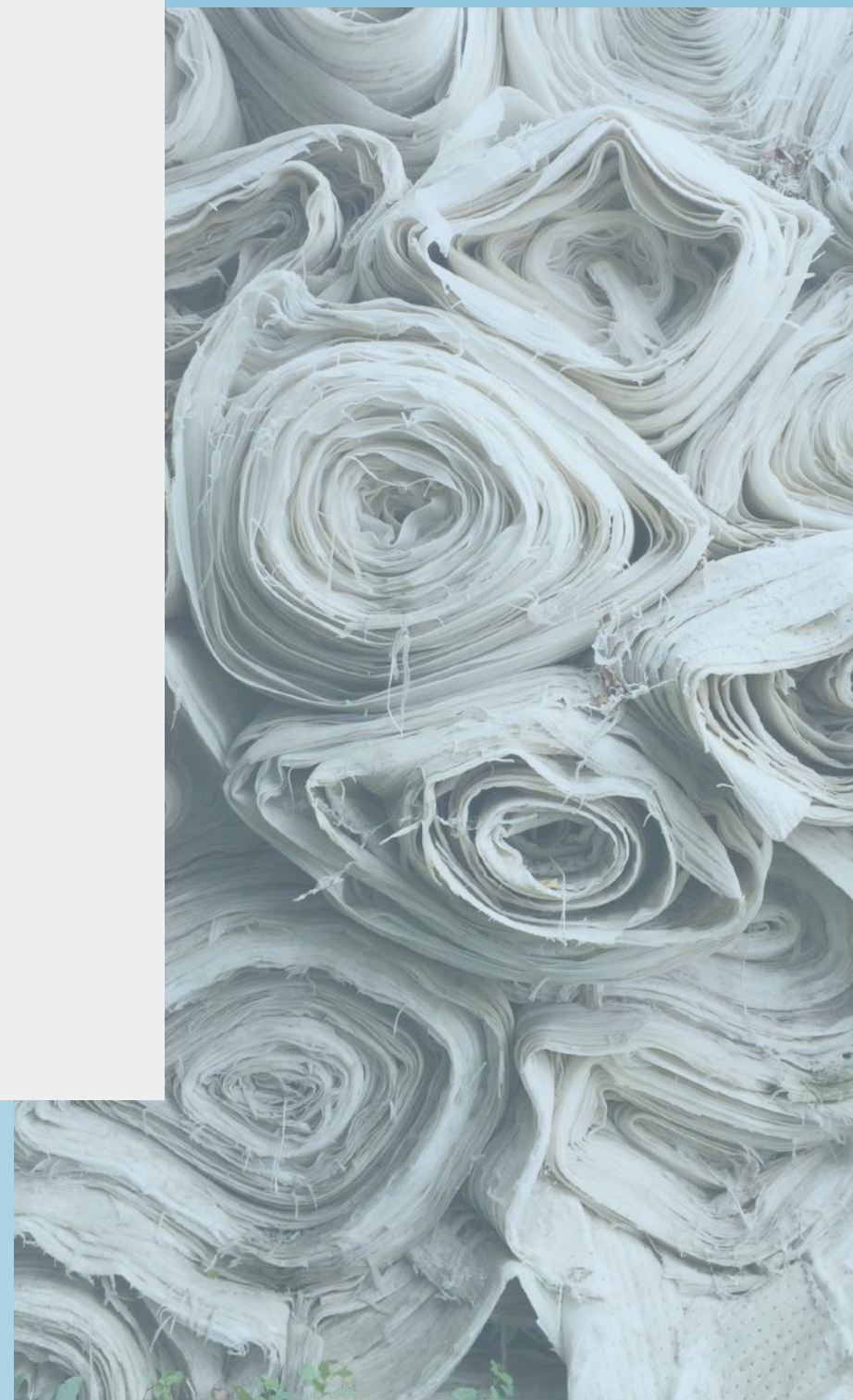
4. DISRUPTION IN THE HISTORY:

Disruption in the Industry: the most promising areas

Von Ruzive, Lab & Community Associate, Beyond Form

Brick & mortar has existed since we can remember - it continues to be at the forefront of the retail sector, allowing shoppers the ability to have a tactile experience from understanding the properties of the fabrics, the feel & the fit of their potential purchases. With the rush of festive shopping, **physical stores** tend to be packed with customers, revealing its consistent popularity & demand. Despite this, digital platforms continue to pave the way for further **disruption in the fashion industry** as we have seen in the previous chapter.

The four categories and thirteen startups that have been identified are leaders in the industry for their innovations & response to the demand for digital adaptation to further disrupt the industry. Evidently, this is a **rather broad subject** as some areas attempt to directly tackle the consumer buying habits through the purchase of upcycled or pre-owned products as seen with Reflaunt while others attempt to **shift the overall retail experience** through a more digitised environment as we saw with Lode.





Whichever area is being targeted, the common ground of the exemplary startups lies on the basis of **elevating the value of connecting with brands and retailers according to their sustainability agendas.** The fashion industry is known to be one of the **most polluting in the world** therefore, such innovations must continue to be adopted by brands and retailers to reverse this notion. Whether this is implemented through similar startups providing access to these corporates to more sustainable ways of showcasing their products using the metaverse platforms - resulting into less bulk production of physical products - or the startups providing the consumers the ability to become more responsible shoppers by accessing platforms which may provide further **transparency** as to the product's pre-life cycle (suppliers, ethical responsibilities, methods of production etc.).

All categories have demonstrated great potential according to the statistics and details explained by each startup in the previous chapter; however, some areas are **simpler and quicker to adopt by corporates** than others. It is up to each brand or retailer to prioritise according to its own values of which sector of the industry it deems more important to disrupt for its future. While one brand or retailer may prefer to prioritise working with startups who enhance its digital shopping experience, another may see the most promising area within these categories as the need to retain its loyal customers through continuing to provide detailed information for transparency purposes. Due to the nature of each business model differing from the other, the decisions of **which solutions and startups to adopt must be determined by the corporation's positioning in the industry.**



4. CONTACTS & COPYRIGHTS

Loomish

Loomish SA is a Swiss-based investment management firm specialised in Lifestyle Tech, with a focus on **Fashion, Food, Travel, Cosmetic, Health** and **Design** industries. We are committed to accelerating value creation for all the players within the lifestyle retail ecosystem: investors, digital start-ups and established corporations looking for innovative solutions.

To learn more, follow us on LinkedIn:

Loomish SA

www.loomish.ch

Beyond Form

Beyond Form is a venture studio building **fashion technologies**. We believe that the future of the fashion industry requires a more **sustainable** and innovative approach. To solve this, we partner with change-making **founders** & corporates to build, fund, and scale fashion tech **startups** worldwide.

To learn more, follow us on LinkedIn:

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www.beyondform.io

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INNOVATION CASE STUDIES: 13 STARTUPS

BOOSTING THE SUSTAINABILITY AGENDA FOR FASHION BRANDS



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