

Hanger usage in the UK

A report on plastic hanger usage in the UK clothing market during 2019.

Research conducted by:

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Summary of the report

This report researches the number of plastic hangers used throughout 2019 in the UK clothing market.

Primary research data has been used in conjunction with relevant existing data, from reputable providers of statistics, to calculate figures and to generate information about hanger consumption and usage to share with the UK fashion industry.

Key research findings include:

- The number of plastic hangers used by the UK clothing market in 2019
- The number of plastic hangers used purely to ship garments to or within the UK
- Industry practice regarding the recycling, re-use and disposal of plastic hangers
- The importance of sustainability in the purchase of hangers for the fashion industry

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Supporters of the report



The Conscious Fashion Campaign supported by the United Nation's Office for Partnerships



The Sustainable Angle

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Introduction



Global clothing manufacture is growing at an exponential rate:
 2005 = **74.3 billion items**,
 2019 = **130.6 billion items**



The annual value of fashion and footwear is set to reach £2 trillion by 2030, an anticipated growth of **£500 billion** in the next decade



92 million tonnes of waste is created throughout the value chain annually



Fashion is the second most polluting industry in the world, second only to oil, causing 8.1% of the world's total carbon emissions

Aims and Objectives

CONTEXTUAL REVIEW

INDUSTRY ENGAGEMENT

AIM 1

To ascertain the quantity of garments produced annually for the UK fashion market.

AIM 2

To establish the average number of units of clothing produced annually by market sector.

AIM 3

To determine the total number of plastic hangers used annually in the UK.

AIM 4

To establish the quantity of plastic in-transit hangers used in the UK. (Hangers solely used for the transportation of clothing)

SECONDARY RESEARCH ANALYSIS

Literature review, market reports and sales figures.
 Conducted by Dr Alana James

PRIMARY DATA COLLECTION

Quantitative survey, analysis and statistic calculations.
 Conducted by Emma Reed

Research

Research Methods

- Data relating directly to hanger usage is not available, so research began with the broader subject of the UK clothing market 2019
- Existing market data relating to sales in the UK clothing market was used in conjunction with new, fresh data collected via an online survey
- This quantitative data was used to uncover patterns of hanger usage by 3 market sectors of the clothing market and online
- The new data obtained through primary research was scaled up using the existing market data, to create usable statistics about hanger usage to share with the fashion industry

Research Participants

- Research participants were identified as senior people working in fashion companies, in functions such as buying and merchandising, product development, supply chain and corporate responsibility
- Access to information surrounding individual companies' hanger purchasing decisions was a key criteria in identifying participants and thereby excluded retail store personnel and packaging manufacturers
- Suitable research participants were individually selected to take part, for the quality and accuracy of the responses they would be able to deliver
- Research participants consented to the use of their survey input in the wider research project exploring the use of clothing hangers in the UK fashion industry
- Survey responses were anonymized, with no questions being posed that would reveal personal identity or company affiliation

Research Participants

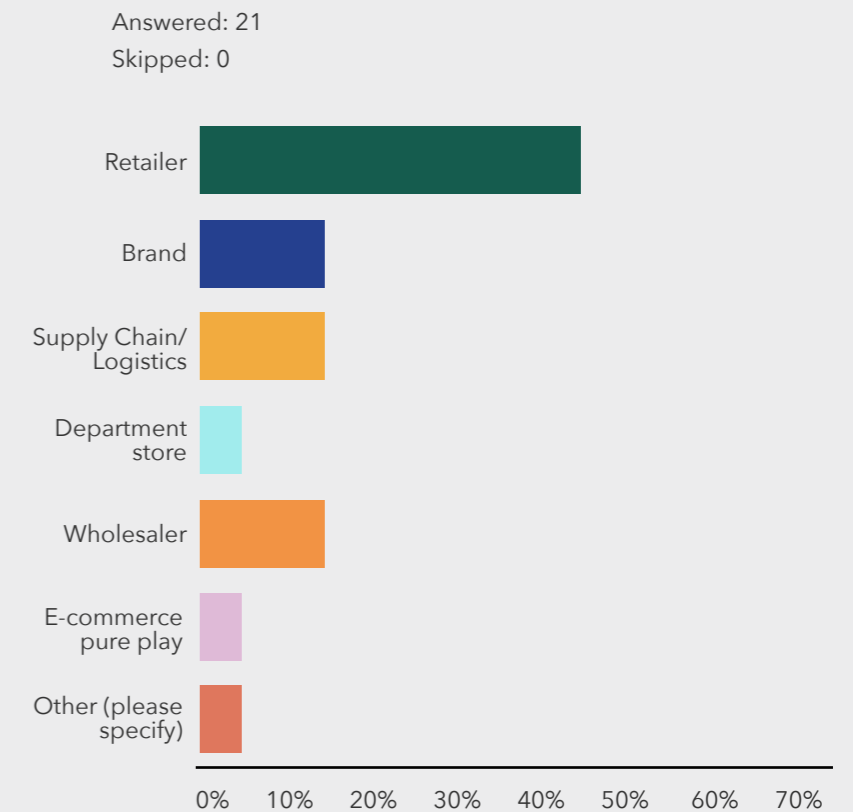
The majority work in retail or ecommerce head office (53%)

Others work in the supply chain (28%)

Senior personnel working for brands make up (14%) of participants

The remaining (5%) are Retail Management Consultants

Which type of apparel business do you work for?



The UK clothing market

The UK Clothing market statistics

Annual expenditure on Clothing
in the uk 2019

59.3 BILLION GBP (1)

Average cost per item of Clothing
in the uk 2019

£37.21 (2)

Number of items of clothing purchased
in the uk 2019

1.59 BILLION (3)

Average number of items of clothing
purchased by uk adults in 2019

28 ITEMS (4)

Consumption of new clothing in the UK is the highest in Europe at 26.7 kg per capita (5):

- UK 27.6 kg
- Germany 16.7 kg
- Denmark 16 kg
- Italy 14.5 kg
- The Netherlands 14.0 kg
- Sweden 12.6 kg

The UK is a good place to start calculating annual hanger usage, with a view to extending the research to include the rest of the world at a later stage.

The UK Clothing market sectors

By looking at 3 sectors of the UK physical clothing market and online(6) for similarities and differences in behaviour and attitudes towards hanger usage, it is possible to arrive at a set of figures to represent plastic hanger usage for each sector and to scale these up for the entire market.

The U.K. clothing market (as indicated by sector growth) 2019 (7) can be segmented as follows:

The U.K. Clothing Market Sectors 2019	Share of revenue	Sales in £Billions	Average selling price
Luxury	20.80%	1.233	£398.24
Premium + mid market	37.50%	2.224	£37.21
Value and discount	41.70%	2.473	£16.14

(8)

Fast and ultra-fast fashion

Fashion brands are producing almost twice the amount of clothing today than they were in 2000, with a consumer shift to buying more and wearing less frequently

The past decade has seen fast fashion being superseded with the emergence of ultra-fast fashion, taking the speed and volume of clothing production to the extreme

Ultra-fast fashion retailers (e.g. Boohoo, Pretty Little Things, Misguided) deliver 1000+ new styles to market every week, offering a constant cycle of new products available to their customers.

Despite prominent growth of ultra-fast retailers, 57% of consumers agree that buying too many garments is bad for the environment

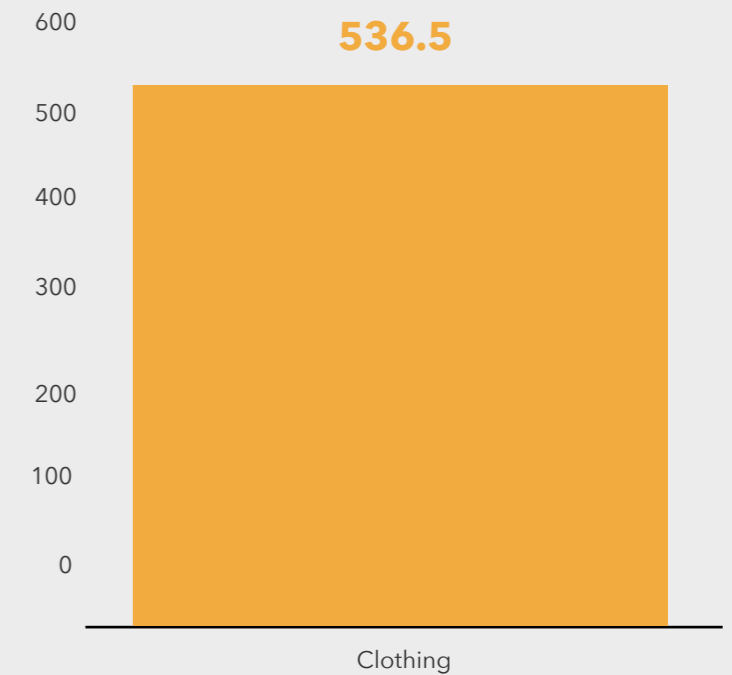
Unit sales of clothing in UK supermarkets

Supermarket sales alone account for 536.5 million units of clothing sold in the UK

Visual merchandising designed to facilitate self-service in supermarket physical retail requires a large number of hangers

58% of these units are sold on a plastic hanger

Supermarket unit sales of clothing in Great Britain in 2018 (in million units)



Source:
IRI
© Statista 2020

Additional Information:
United Kingdom (Great Britain): 52 weeks ending March 31, 2018

Online Clothing

Online vs Bricks & Mortar Retail

In 2019, 18.6% of total retail sales were carried out online, in fashion 24% of all sales were e-commerce **(7)**

By 2024, total online retail sales are predicted to grow to 27.7%

Despite a year-on-year growth of approximately 4% annually in fashion, bricks-and-mortar stores have evidenced dramatic losses

In June 2019, The British Retail Consortium detailed a 7-year low on high street footfall, with 10.3% of all UK shops being empty

1/3 of fashion consumers shop online due to convenience, but still prefer physical merchandise, with 70% of sales still being made offline

Hangers

Hanger Consumption

Factors increasing consumption

UK Household spending on clothing is continuing to rise, despite annual growth in spending slowing down

The fast-fashion, accelerated business model that has evolved since the 1980s increases the numbers of new fashion collections developed each year, creating more demand for clothing and ultimately more hangers

Factors decreasing consumption

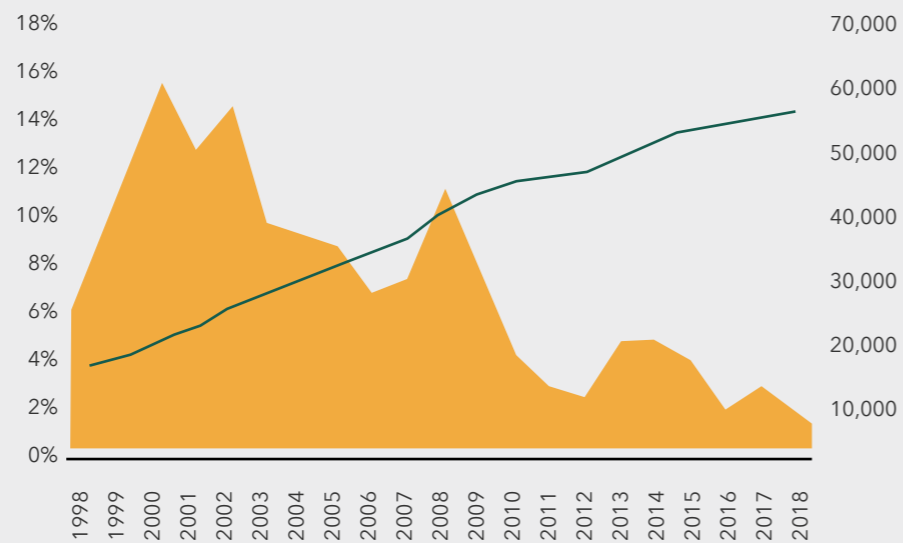
The growth of online clothing retail indicates a reduction in hanger consumption in general, including plastic hangers. Asda removed all hangers from their online George.com supermarket clothing orders during 2019, to support reducing plastic, parcel size and postal weight **(9)**

According to our July 2020 survey, 27% of UK online clothing orders include a hanger of some kind.

UK household spending on clothing

Spending on clothing in the UK is continuing to rise despite the annual growth of spending slowing down

Following this trend, an above inflation increase in average selling price over the next decade would lead to a decrease in unit sales and a corresponding decrease in demand for plastic hangers



Source: ONS Consumer Trends, released 20 June 2019. Annual Data.

● %y-o-y, chained value measure ● £m, chained value measure

Key

- Annual level of spending on clothing: rising
- Annual growth of spending on clothing: slowing down

Courtesy of the Wrap Textiles Market Situation Report 2019

Plastics in fashion



Fashion has an unhealthy reliance on non-degradable plastics in the use of synthetic fibres, packaging and visual merchandising (including hangers)



An estimated **42 per cent** of all plastics produced, outside of those used as fibres, are used for packaging



In the EU, total packaging waste in 2016 amounted to nearly **87 million tonnes** or about 170 kg per person



49% of consumers are willing to pay a little more for eco-friendly packaging

Plastic Hangers

Most plastic hangers are made from a complicated mixture of materials, which are difficult, if not impossible to separate

Many have metal hooks, which can jam recycling equipment

Some plastic hangers can technically be recycled by breaking them down into plastic pellets and by reforming the pellets into new hangers

This process weakens the plastic to such an extent that the hangers can usually only be recreated 2 or 3 times before they must be discarded

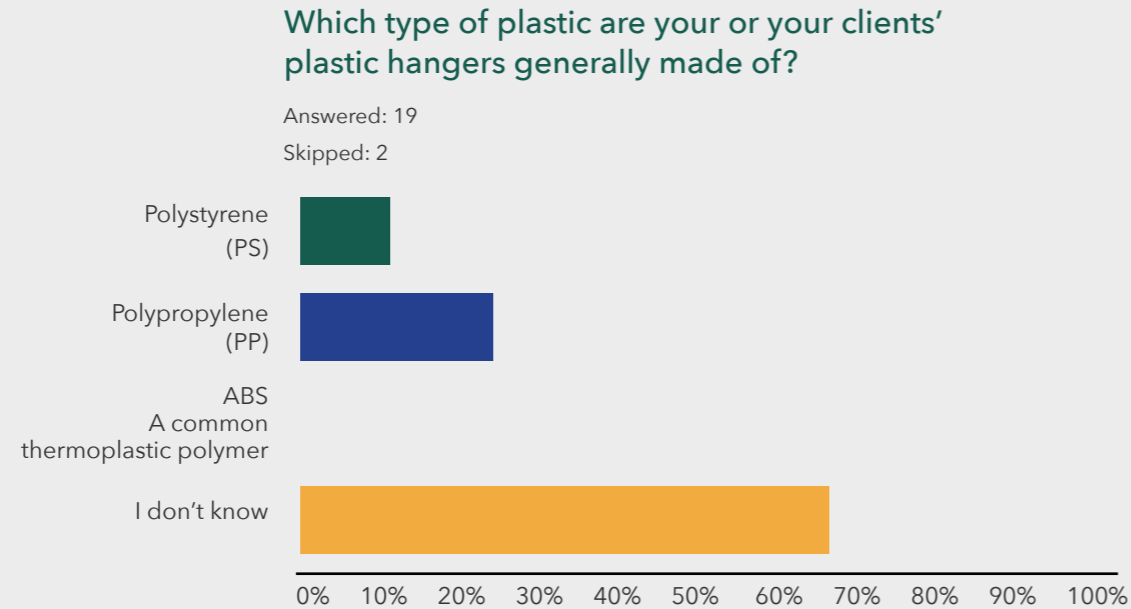
There is no easy way to tell which of the many hangers collected for recycling are made from sufficiently high-grade plastic to be reused in this way, so they end up in landfill as a matter of course(10)

Our research found that **80% of hangers** used are made of plastic and **68%** of informed research participants did not know the composition of the plastic hangers they used.

Plastic Hanger Composition

68% of fashion companies surveyed were not aware of the composition of their plastic hangers

Very few plastics can be easily recycled, so it follows that companies making efforts to recycle their plastic hangers, cannot always be certain that this is happening.



Answer choices	Responses	Count
Polystyrene (PS)	10.53%	2
Polypropylene (PP)	26.32%	5
ABS (a common thermoplastic polymer)	0.00%	0
I don't know	68.42%	13

In-Transit Hangers

Often invisible and unaccounted for, some retailers do not use plastic hangers in their stores, but they do use plastic in-transit hangers

In these cases each store has its own set of bespoke hangers, often wooden or metal in fabrication, which is kept by the store, not given away to the customer

The reality is that some goods still travel to the stores on plastic hangers. They are replaced with a "better" hanger at the retail destination.

In the luxury clothing sector 31% of plastic hangers are used purely for the purpose of transportation and only 50% of hanging stock retails in store on the hanger on which it was transported.

Research Findings

New Hanger usage statistics 2019 ⁽¹¹⁾

Plastic hangers used per year in the uk clothing market

954.6 MILLION

Plastic hangers sent out in online clothing orders

82.6 MILLION

Unit sales of clothing with an associated plastic hanger

60%

Plastic hangers used annually per member of the uk adult population

18

Plastic in-transit hangers used per year in the uk clothing market

148.2 MILLION

Plastic hangers used annually by the luxury clothing sector

2.7 MILLION

Plastic hangers used solely for the transportation of clothing

16%

Fashion professionals citing recyclability as the primary consideration for hanger selection

15%

Reuse, recycle or send to landfill?

Store practice now mostly defaults to retaining hangers.

M&S only parts with a hanger if the customer requests it (12)

In our survey **20%** of plastic hangers were given away to the customer

30% of plastic hangers are reused but broken hangers cannot be reused and this often signifies the end of their lifetime, unless they are successfully recycled

In our survey **35%** of fashion companies said their hangers were either all or mostly recycled

In some instances recycling means collection by the hanger supplier

The hanger supplier resells the unbroken hangers back to the supply base (the retailer will generally receive a retrospective discount for facilitating this process)

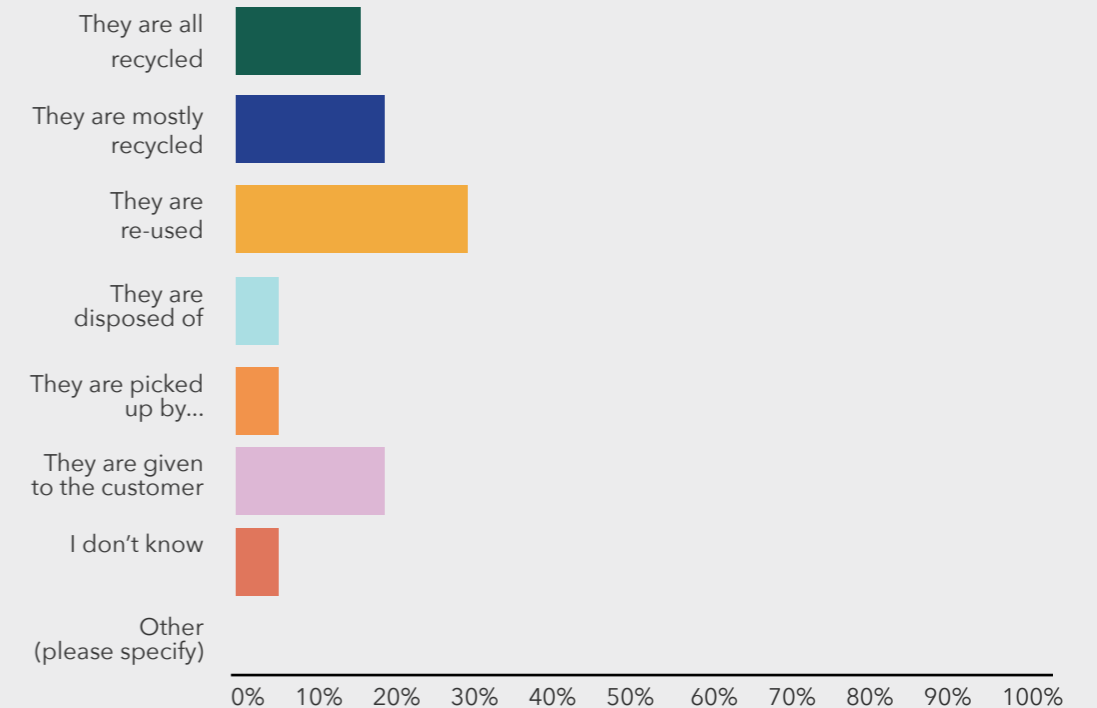
Survey participants reported **5%** of hangers being collected by hanger suppliers. It can be assumed that the remaining hangers, and some of those ideally designated for recycling but failing to meet the criteria, are disposed of.

Reuse, recycle or send to landfill?

Only 5% of fashion companies deliberately dispose of the plastic hangers they no longer require but it is not always clear what happens to unwanted hangers, despite the intention to reuse and recycle them

What mostly happens to the plastic hangers that are no longer required?

Answered: 20
Skipped: 1



Answer choices	Responses
They are all recycled	15.00%
They are mostly recycled	20.00%
They are re-used	30.00%
They are disposed of	5.00%
They are picked up by the supplier	5.00%
They are given to the customer	20.00%
I don't know	5.00%
Other (please specify)	0.00%

“Hangers are the plastic straws of the fashion industry”

Roland Mouret’s call to action for the fashion industry undoubtedly questions the need for a more sustainable approach.

When asked about the role sustainability plays in the purchase of commodities in their clothing business, **82%** of survey participants said that it is either important or extremely important. Only **5%** said that is not a consideration.

This is partially contradicted by the survey answers to a question about the main criteria for choice of hanger: **35%** voted for functionality. The hanger has to be fit for purpose after all. And **25%** indicated that the main consideration is price.

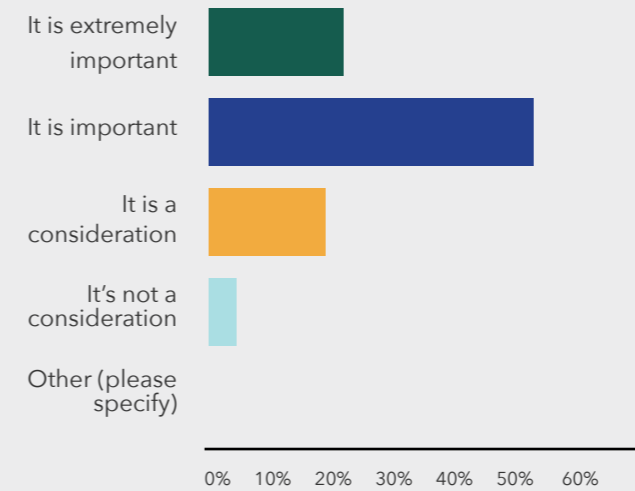
Only **15%** said that the recyclability of the hanger is the main consideration for its selection.

Hanger Selection Criteria

82% of survey participants said that sustainability is either important or extremely important

What role does sustainability play in the purchase of commodities in your (or your clients’) business.

Answered: 21
Skipped: 0

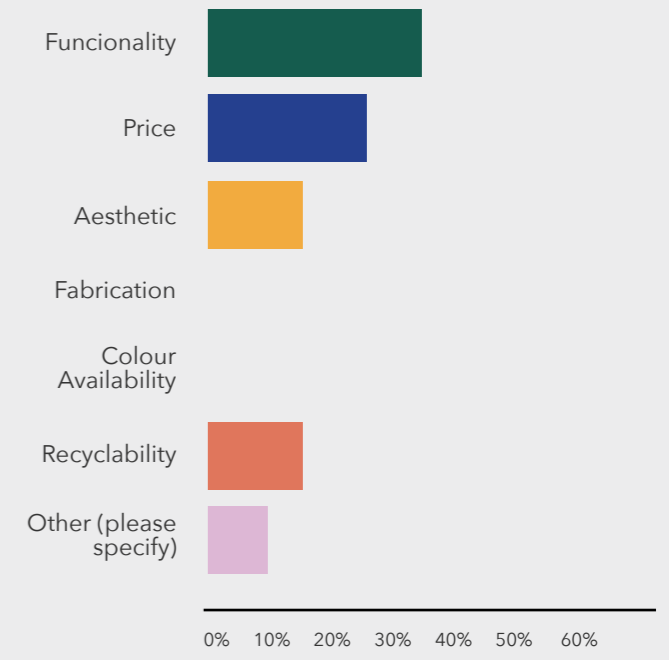


Answer choices	Responses
It is extremely important	23.81%
It is important	52.28%
It is a consideration	19.05%
It is not a consideration	4.76%
Other (please specify)	0.00%

Only 15% of survey participants said that recyclability is the most important criteria for hanger selection

What is the main criteria for your, your company’s or your clients’ hanger choice?

Answered: 20
Skipped: 1



Answer choices	Responses
Functionality	35.00%
Price	25.00%
Aesthetic	15.00%
Fabrication	0.00%
Colour Availability	0.00%
Recyclability	15.00%
Other (please specify)	10.00%

Conclusions and recommendations

Research Challenges and Limitations

The sample group involved in this research was small owing to the specialist knowledge required, the sensitive nature of the information requested and the limited incentive to complete the survey. More than 100 suitable participants were invited to take part but only 20 fully completed the survey.

The online tool's sliding scales were difficult for survey participants to use accurately. Were the survey to be repeated, it is recommended that actual figures for turnover, units sold and average selling price should be requested.

As a result a level of informed assumption was used in working out the average selling price per sector. These was based on the average selling price for the total UK clothing market and available unit sales for some business sectors.

The defined market sectors in this study behave differently towards hangers in physical retail, whereas there are more similarities in the way in which they use hangers online. For this reason online has been treated as a cross sector entity in this research.

Hanger usage figures were based on units sold in the UK market in 2019. The assumption has been made that although some sales taken in 2019 will use hangers from earlier years, this is balanced out by the unsold residual stock from 2019, for which hangers have been purchased but are not included in the figures.

Conclusions



Too many plastic hangers are used by the UK clothing industry. Reducing the environmental impact of plastic hangers requires a substantial increase in more sustainable alternatives.



Industry **awareness** of the damage to the environment caused by huge numbers of plastic hangers being disposed of in landfill is **low**.



Fast-fashion and the throwaway society it facilitates increases consumption of materials required in the retail commodity supply chain, such as plastic hangers.



The migration of clothing sales online aids the reduction of plastic hanger consumption. Fashion companies are not adapting quickly enough to accommodate this shift and to eliminate the delivery of redundant plastic hangers.

Recommendations

Increased choice of alternatives to plastic hangers

Functionality is the main factor affecting hanger selection. Recyclable hangers should be made available in a full range of hanger types, shapes and sizes to ensure that they adequately meet demand.

Lower cost sustainable alternatives

Cost is an important factor affecting hanger selection. An increased interest in sustainable hanger alternatives would drive volumes up and prices down.

Industry awareness

A campaign is required to inform the fashion industry about plastic hanger usage and the sustainable alternatives.

Proliferation of this research

This study only represents hanger usage in the U.K. It should be replicated in other territories with high clothing consumption to gain a clearer picture of worldwide plastic hanger usage.

Consumer pressure

Change in the fashion industry is frequently consumer led. A PR campaign raising the awareness of the damage plastic hangers are inflicting on the environment will help to drive a change in industry attitudes.

Further Research

The authors suggest the following opportunities for further research:

- **Examine the product lifecycle of plastic hangers** to explore consumer perception, user experience and innovation opportunities
- **Replicate the UK study across a European and US market** to facilitate comparable data sets
- **Conduct feasibility studies with multiple stakeholders**, i.e. retailers, consumers etc.

Research report commissioned by

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While we have tried to make sure this report is accurate, the authors cannot accept responsibility, or be held legally responsible, for any loss or damage arising from or in connection with information in this report being inaccurate, incomplete or misleading.
August 2020

End Notes

1. Statistic for annual expenditure sourced from Apparel market in the United Kingdom Statistics & Facts, Statista, Jul 3, 2020
2. Statistic for cost of clothing sourced from <http://www.telegraph.co.uk/fashion/news/do-spend-1045-clothing> Average cost per item of clothing = £37.21
3. Number of items purchased calculated using statistics (1) and (2)
4. Calculated using an adult population figure of 53,534,872 sourced from <http://worldpopulationreview.com/countries/united-kingdom-population>
5. Statistic sourced from document by the Commons Select Committee 2018
6. Online equates to clothing from all sectors, pure-play and multi-channel retail, purchased online
7. Market sector information derived from McKinsey Global Fashion Index (McKinsey and Company in partnership with the Business of Fashion)
8. Luxury sector includes physical retail of brands such as Burberry and Selfridges. Premium and mid-market sector includes Reiss, M&S, Zara and Next. Value and discount includes Primark, TK Maxx and supermarket own brands
9. Information sourced from Asda's own website July 2020
10. Information sourced from The Future of Global Rigid Plastic Packaging to 2020 (2015) Smithers Pira
11. New Hanger Usage 2019 Statistics calculated using statistics obtained through primary research for this study in conjunction with available sourced statistics
12. Information sourced from the Marks & Spencer website July 2020
13. Full list of source references and appendices available on request