

REDIFINING SUSTAINABILITY IN SPORTS FASHION:

INNOVATION TRENDS,
BUSINESS MODELS
AND CONSUMER EXPECTATIONS

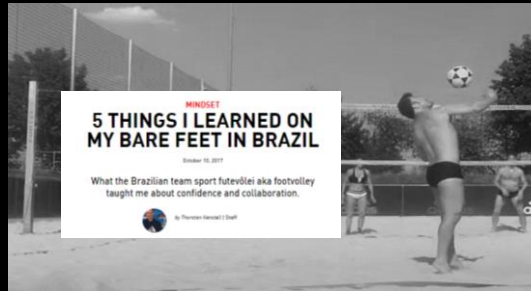
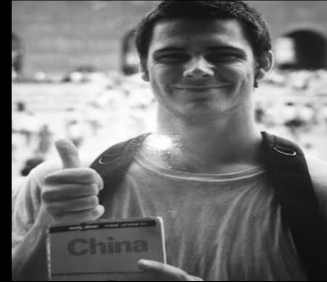
THORSTEN HARSTALL



A G E N D A .

- CHECK-IN: WHO. WHAT.
- SUPPLY SIDE: BRAND CASES & INNOVATION BENCHMARKS.
- DEMAND SIDE: CONSUMER TRENDS & TENDENCIES.
- CHECK-OUT: FUTURE (PACKAGING) OPPORTUNITIES.

THORSTEN HARSTALL



PEOPLE.

PASSION.

PROFESSION.

J U S T I C E .

(BY NOT ACTING SUSTAINABLE ...) "WE ARE IMPOSING A HUGE COST ON BOTH PRESENT AND FUTURE GENERATIONS, SO WE ARE DOING AN INJUSTICE TO THOSE WHO ARE DEFENSELESS OR DO NOT YET EXIST."

PETER SINGER (AUSTRALIAN MORAL AND BIO-ETHICS PHILOSOPHER)

AGREE

DISAGREE

C O O P E R A T I O N .

TESTING IF INDIVIDUAL RATIONALITY WILL MAKE GREATER COLLECTIVE BENEFIT IMPOSSIBLE OR NOT

- A: RECEIVE 100 DOLLAR (CAN EITHER KEEP ALL THEIR MONEY OR GIVE IT ALL TO PERSON B)
- IF THEY GIVE MONEY TO B, IT WILL BE TRIPLED
- B: IF THEY RECEIVED THE 300 DOLLAR (THEY FACE A BINARY CHOICE, THEY CAN KEEP EVERYTHING FOR THEMSELVES OR SPLIT THE MONEY EVENLY BETWEEN THEMSELVES AND PERSON A.

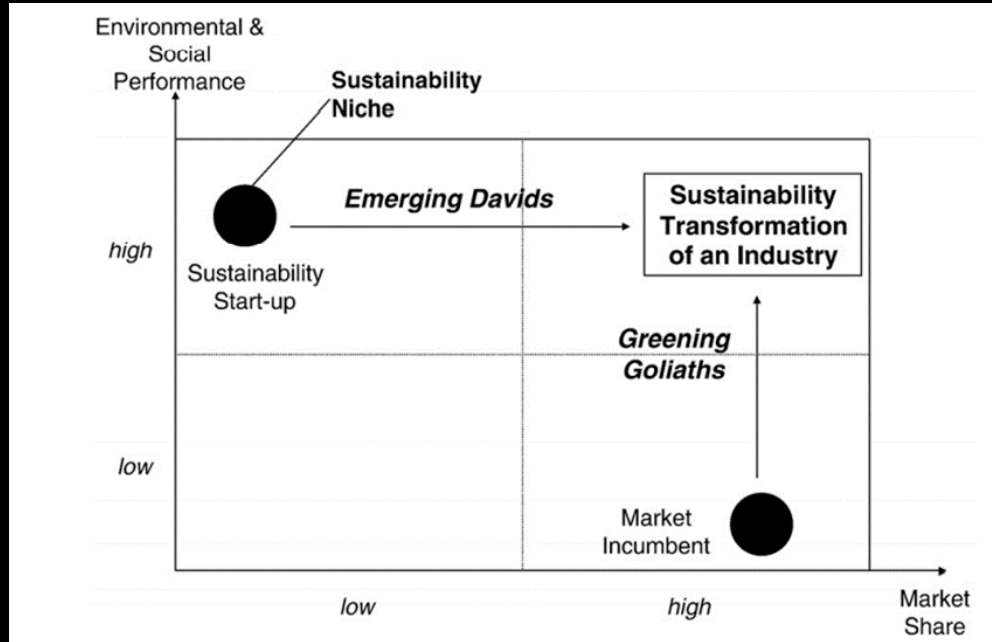
AS A)

KEEP EVERYTHING

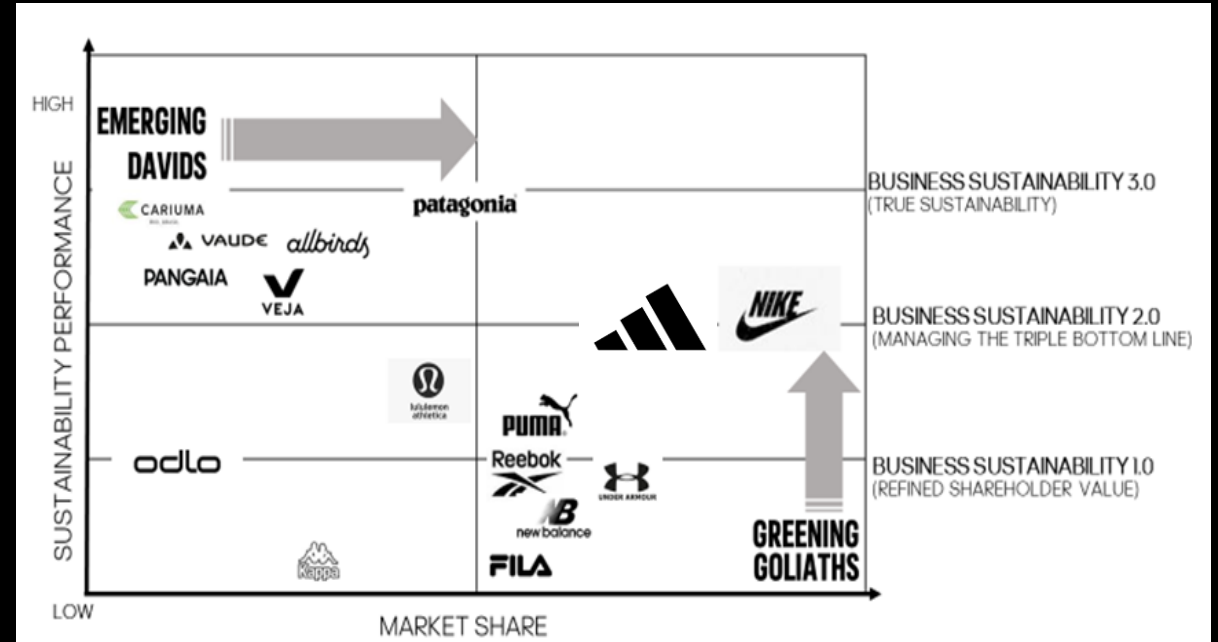
AS A)

SPLIT EVERYTHING

SUSTAINABILITY MARKET CO-EVOLUTION.



SOURCE: SUSTAINABILITY INDUSTRY TRANSFORMATION (HOCKERTS & WÜSTENHAGEN, 2009)



SOURCE: SIMULATED MARKET MODEL IN SUSTAINABILITY AND THE INVISIBLE HAND, HEAD AND HEART (HARSTALL, 2021)

B U S I N E S S S U S T A I N A B I L I T Y T Y P O L O G Y .

• Sustainability 0.0	• Sustainability 1.0	• Sustainability 2.0	• Sustainability 3.0
<ul style="list-style-type: none"> • Purely economic view of the firm and the business processes. • Focus remains on typical economic concerns, e.g. access to cheap resources, efficient processes . • Pursue to produce economic value (profit, market value or shareholder value). 	<ul style="list-style-type: none"> • Shift from purely economic concerns to include also social and environmental concerns. • Managing sustainability risk & reputation management. • Embracing sustainability opportunities. 	<ul style="list-style-type: none"> • Change from shareholder value to a broadened value proposition including. people, planet, and profit. • Management of the “triple bottom line” approach. • Redefining business models and products/services. 	<ul style="list-style-type: none"> • Management of internal capabilities, competencies and resources in service of the UN SDG’s • Innovating new strategies, business models, products/services to generate a net positive impact . • Changing the perspective to create value for the common good.
<p>BUSINESS AS USUAL</p>	<p>SUSTAINABILITY AS USUAL</p>	<p>SUSTAINABILITY TRIPLE BOTTOM LINE</p>	<p>TRUE BUSINESS SUSTAINABILITY</p>

SOURCE: THE BUSINESS SUSTAINABILITY TYPOLOGY (DYLLICK & MUFF 2017)

B U S I N E S S S U S T A I N A B I L I T Y P E R F O R M A N C E .

• Sustainability 0.0

• Sustainability 1.0

• Sustainability 2.0

• Sustainability 3.0

- Purely economic view of the firm and the business processes.
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- Pursue to produce economic value (profit, market value or shareholder value).

➤ **BUSINESS AS USUAL**

B U S I N E S S S U S T A I N A B I L I T Y P E R F O R M A N C E .

• Sustainability 0.0

• Sustainability 1.0

• Sustainability 2.0

• Sustainability 3.0

- Shift from purely economic concerns to include also social and environmental concerns.
- Managing sustainability risk & reputation.
- Embracing sustainability opportunities.

➤ SUSTAINABILITY AS USUAL



S U S T A I N A B I L I T Y B U S I N E S S P E R F O R M A N C E .

• Sustainability 0.0

• Sustainability 1.0

• Sustainability 2.0

• Sustainability 3.0

- Change from shareholder value to a broadened value proposition including people, planet, and profit.
- Management of the “triple bottom line” approach.
- Redefining business models and products/services.

➤ **SUSTAINABILITY TRIPLE BOTTOM LINE**



B U S I N E S S S U S T A I N A B I L I T Y P E R F O R M A N C E .

• Sustainability 0.0

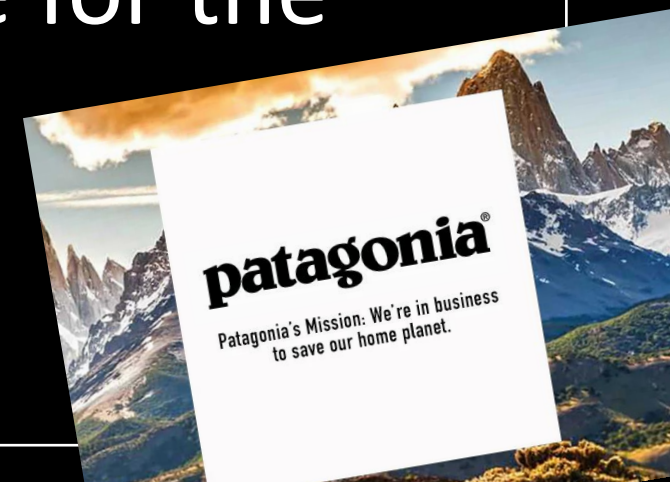
• Sustainability 1.0

• Sustainability 2.0

• Sustainability 3.0

- Management of internal capabilities, competencies and resources **in service of the UN SDG's**
- Innovating new strategies, business models, products/services to generate a net positive impact .
- Changing the perspective to create value for the common good.

➤ **TRUE BUSINESS SUSTAINABILITY**



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- CHECK-OUT: FUTURE (PACKAGING) OPPORTUNITIES.

Born in 2005
in Brazil.

2005

UA Volley

DON'T BUY
THIS JACKET



11

We're in
business
to save
our home
planet.

patagonia

2015



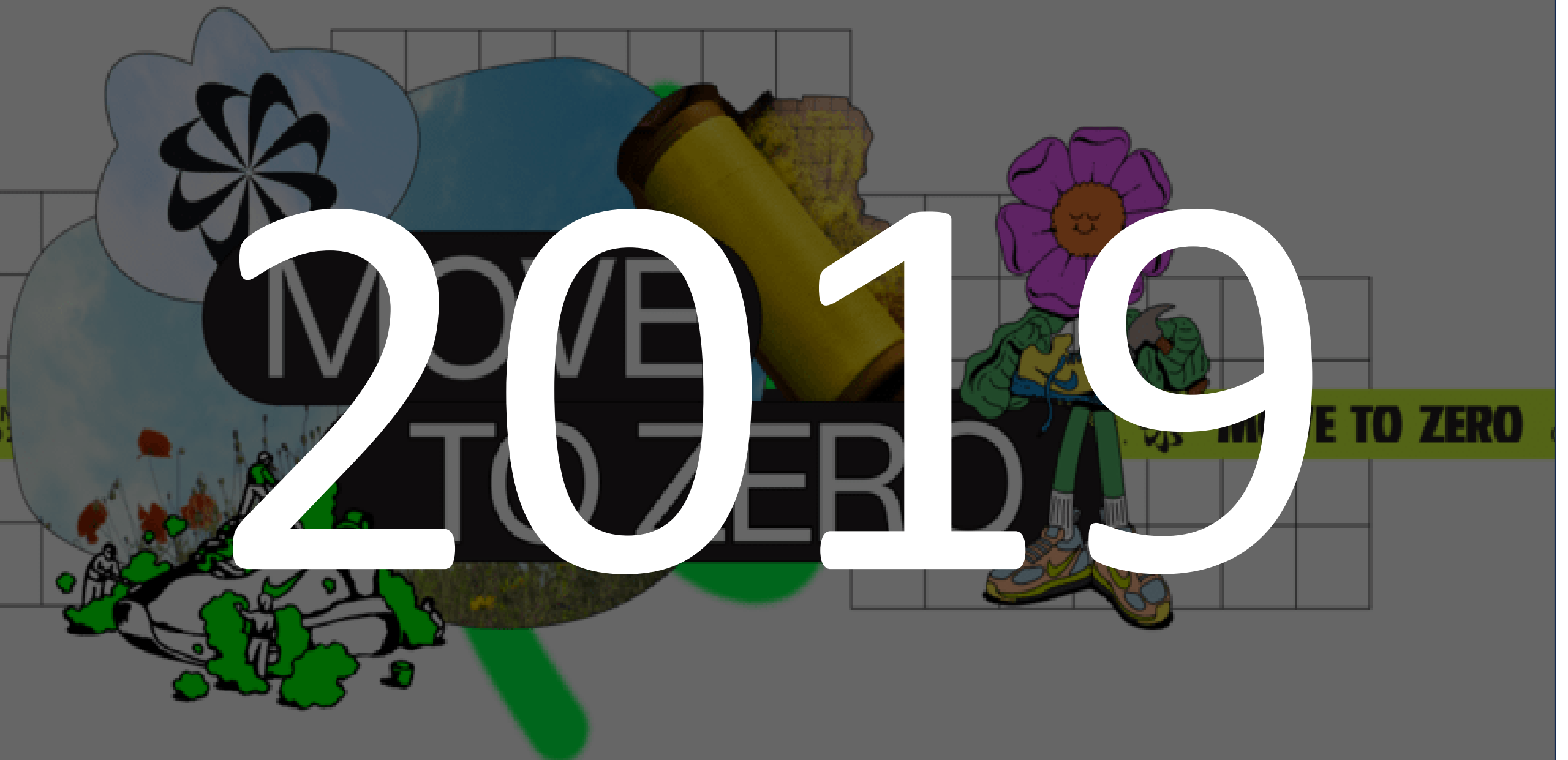


20



16

2019



2020

allbirds

SHOE-MAKING
PACKAGING
TRANSPORTATION
USE
END-OF-LIFE

2.94
TOTAL kg CO₂e / PAIR



2021

C I R C U L A R B U S I N E S S M O D E L I N N O V A T I O N S

R E N T . R E - S E L L . R E P A I R . R E - T H I N K I M P A C T .

Cloudneo



“The 100% Recyclable Running Shoe That’s Only Available by Subscription.”

The Wall Street Journal

“The Greenest Running Running Shoe That’s Saving the Earth.”

Men’s Health

“The First Shoe You’ll Have To Subscribe To.”

Runner’s World

2020

The running shoe you’ll never own

Today, most products are linear. You produce them, use them and throw them away. Over 300 million shoes are thrown out each year. Even worse? Their materials take hundreds of years to decompose.

Meet the Cloudneo. The first bio-based shoe high-performance running shoe available only via subscription. Part of our Cyclon™ program, it’s 100% circular – meaning all its parts can be recycled over and over again. Think: Run. Recycle. Repeat.

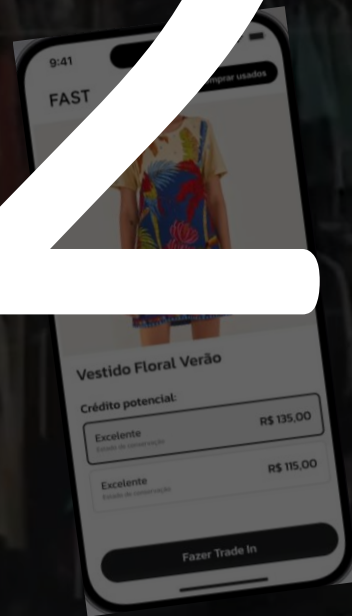
A person is holding a yellow and white crocheted object, possibly a hat or scarf, against a dark background. The year 2021 is overlaid in large white text.

2021

READY TO GET INTO

Resale-as-a-Service

2022



2023

 HOUDINI

Rent
Reuse
Repair
Buy
Try
Subscribe

 HOUDINI



2024



Repair

We hate to see anything is wrong with your product, but we love to get the chance to fix it.

They often quick fixes to make your gear go from damaged to divine. And while we offer repair on all products at our HQ, our repair centers are

Sustainability is at the core of what I do and what Norrøna focuses on -



20

THIS IS FC88



We use apparel the teams have used, returned fan merchandise and defected apparel. From shirt to shorts and pants. With our knowledge about the football industry, we know how to navigate the club and its stakeholders.

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CONSUMERS VOTE FOR SUSTAINABILITY?

CONSUMER TREND RESEARCH.

FORBES > INNOVATION

Consumers Vote With Their Wallets: The Unspoken Consensus On Sustainability



Ross Meyercord | Forbes Councils Member
Forbes Technology Council
COUNCIL POST | Membership (For-Header)

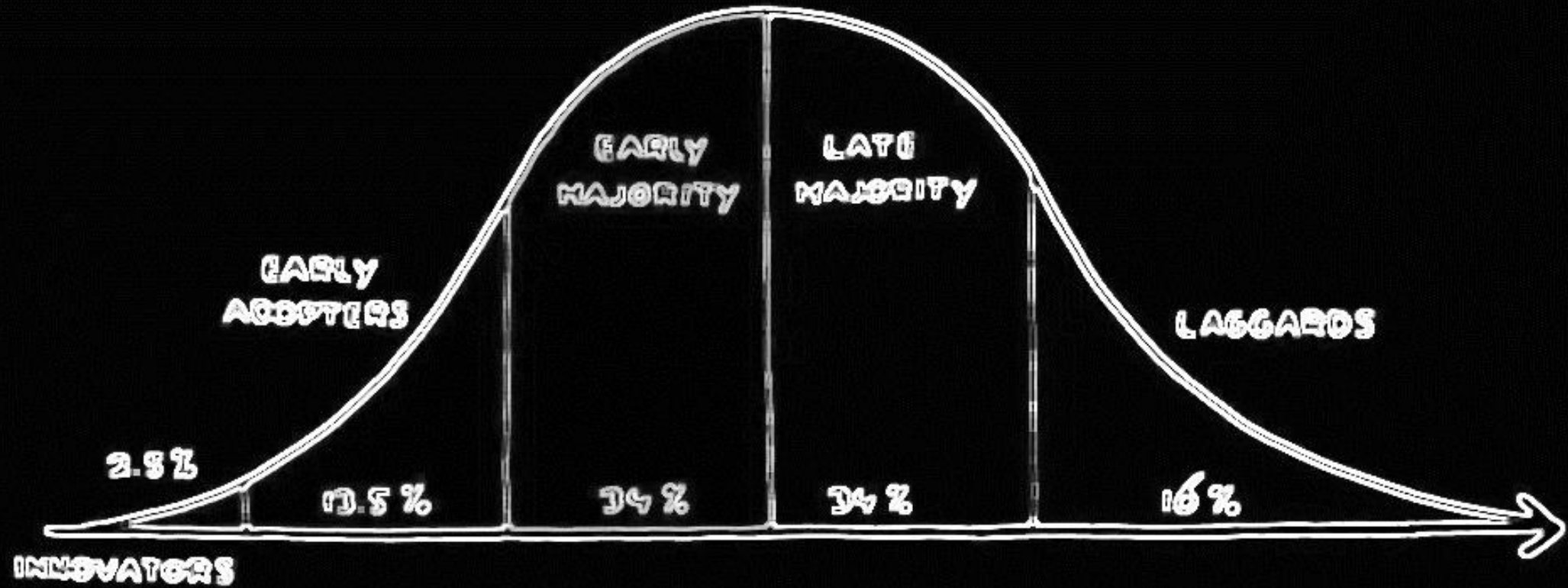


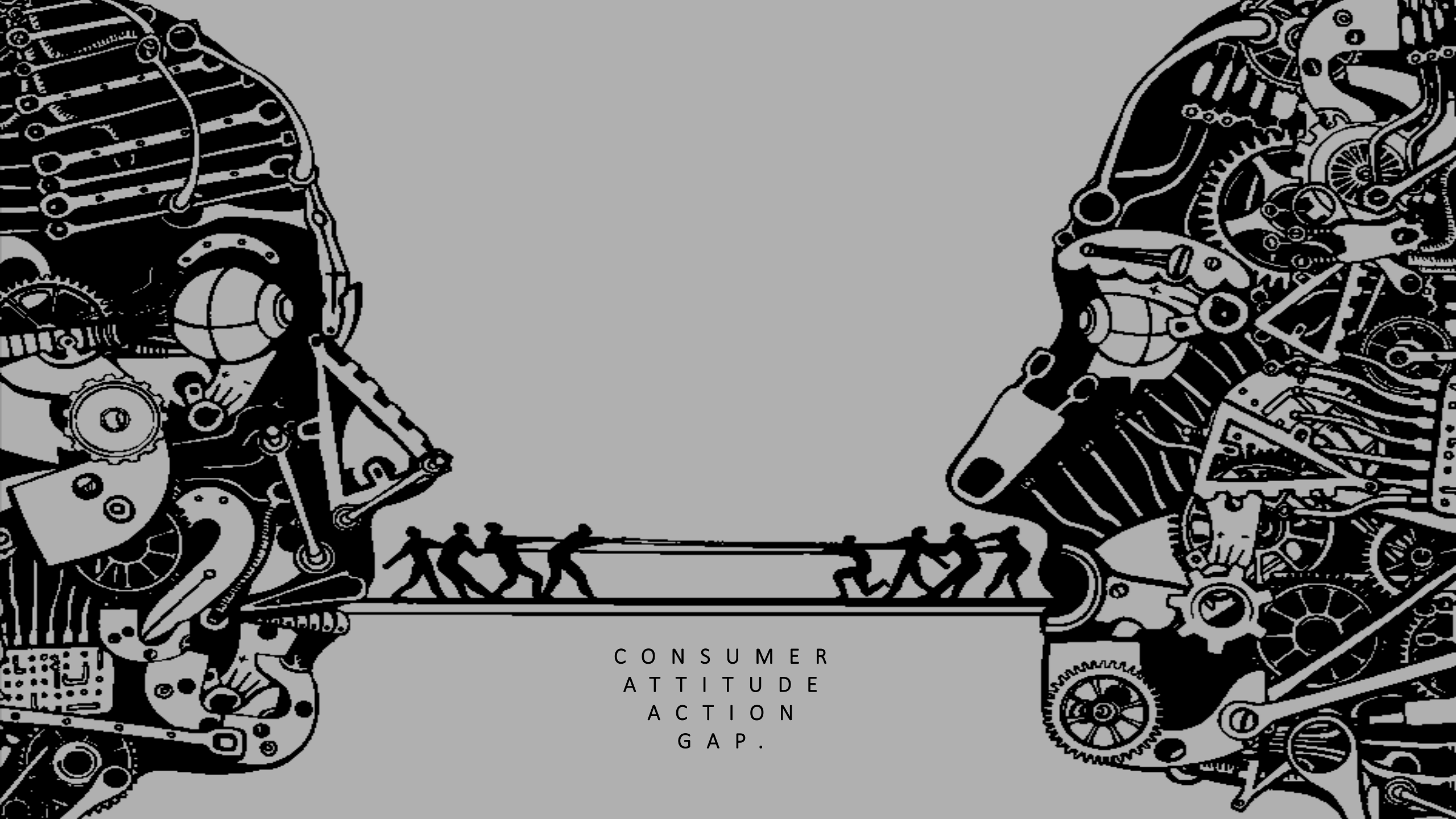
Mar 29, 2024, 10:14 am EST

influence purchase behavior. In particular, many consumers are actively looking for environmental claims when making purchases (66%), with a significant portion (58%) willing to alter their brand loyalty if a company fails to demonstrate eco-friendly practices. This is a powerful reminder that sustainability is not just a moral imperative, but a competitive advantage.

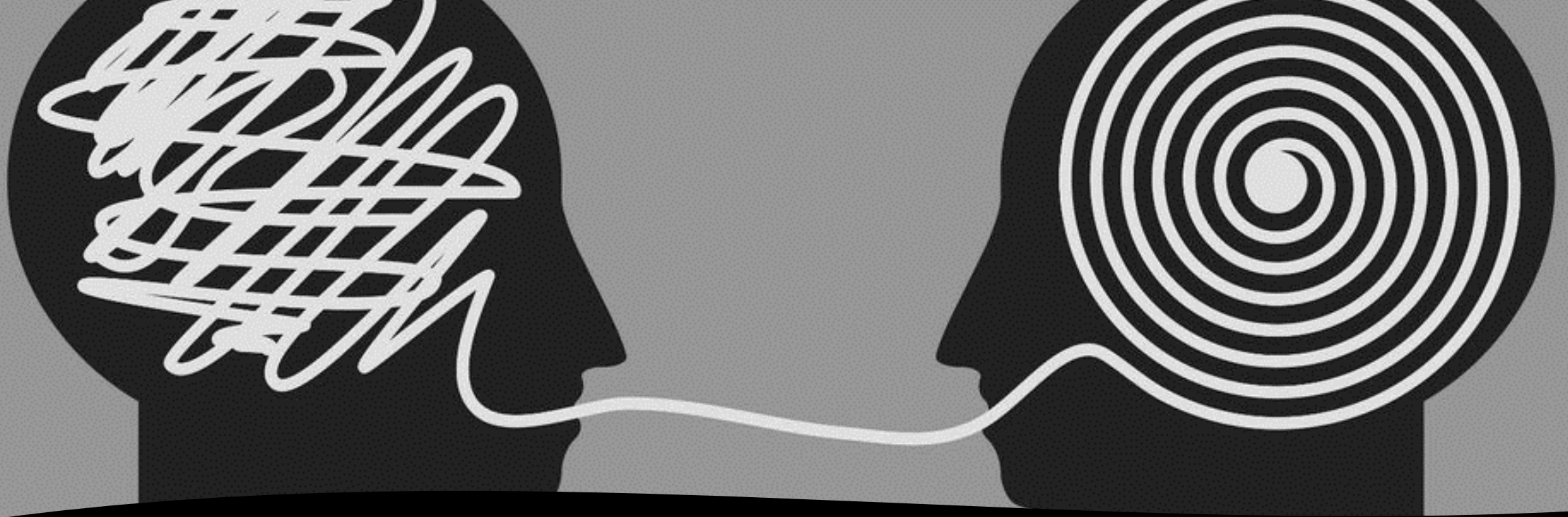
Business discovered in a survey that sustainability-marketed products are not only growing twice as fast as conventionally marketed products, but they are going at premium prices.

CONSUMER TRENDS.





CONSUMER
ATTITUDE
ACTION
GAP.



CHECK-OUT.

FUTURE (PACKAGING) OPPORTUNITIES.

T H R E A T S



B R A N D P R O M I S E , T R A N S P A R E N C Y & T R U S T



OPPORTUNITIES





LEVERAGE
SUSTAINABLE
PACKAGING
TO GROW
CONSUMER TRUST
AND MARKET SHARE

C H E C K - O U T .

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AS B)

KEEP EVERYTHING

AS B)

SPLIT EVERYTHING

T H A N K Y O U !



Thorsten Harstall

Sustainability Brand Strategist from/in/for
Sport, Brand/Product and Go-to-Market...



L E T ' S C O N T I N U E & S T A Y I N T O U C H

B A C K - U P

M O D E R A T I O N H A N D O U T S

R E S E A R C H B E N C H M A R K S & R E F E R E N C E S

C A S E S T U D I E S

S U S T A I N A B L E / C I R C U L A R P A C K A G I N G I N N O V A T O R S

Company Name	Location	Main Business Activity and Core Expertise	Homepage Link	Industry/Sectors/Businesses	Use Case
Traceless Materials GmbH	Hamburg, Germany	Produces innovative biomaterials from plant residues, offering a natural alternative to plastics and bioplastics.	traceless.eu	Circular bioeconomy, sustainable packaging, plastic-free materials, climate-friendly solutions, compostable biomaterials.	Traceless has secured €36.6 million in Series A funding to build its first industry plant, aiming to scale up production of its bio-circular alternative material. The company targets industries such as packaging, consumer goods, and agriculture.
Sway	San Francisco, USA	Creates compostable replacements for plastic using seaweed, focusing on circular economy and regenerative systems.	swaythefuture.com	Sustainable packaging, single-use plastic alternatives, seaweed-based materials, circular economy solutions.	Sway's products are used in various sectors, including food packaging and consumer goods. They focus on providing sustainable alternatives to single-use plastics, with clients ranging from small businesses to larger corporations.
S.Lab	Kyiv, Ukraine	Produces eco-friendly packaging using agricultural waste and mushroom mycelium, aiming to reduce reliance on traditional plastics.	ilab-s.com	Sustainable packaging, biodegradable materials, mycelium-based products, thermal insulation, sound isolation.	S.Lab serves the biopharmaceutical industry, clinical research organizations, and healthcare providers. Their products include cold chain logistics for clinical trials and biological samples.
Grown.bio	Heerewarden, Netherlands	Develops mycelium-based packaging solutions that are 100% compostable and CO2 efficient, aiming to replace plastic foam.	grown.bio	Sustainable packaging, mycelium-based materials, protective packaging, luxury packaging, insulating packaging.	Grown.bio's mycelium packaging is used in various sectors, including industrial, luxury, and influencer markets. Their products are designed to replace plastic foam with a CO2-efficient alternative.
Notpla	London, United Kingdom	Creates regenerative packaging materials from seaweed and plants, offering sustainable alternatives to single-use plastic packaging.	notpla.com	Sustainable packaging, seaweed-based materials, biodegradable packaging, food containers, liquid packaging, compostable products.	Notpla's products include plastic-free takeaway food containers, flexible films, and edible films. They serve the food, home care, and personal care sectors, with a focus on reducing environmental impact.

BRAND APPLICATIONS 1/2

Sustainability Brand in the Sporting Goods Industry	Segmentation	Main Business Activity	Sustainable Packaging Solutions	What Circular Services Do They Offer	What Circular Packaging Solutions Do They Offer for the Circular Services	Which Solutions and Companies Do They Use for Their Circular Service and Product Offers	Weblink
Adidas	Greening Goliath	Sportswear and footwear	Uses sustainable materials like recycled polyester and ocean plastic.	Take-back programs and resale of used products.	Uses sustainable materials like recycled polyester and ocean plastic.	Notpla (seaweed-based packaging for products).	adidas.com
Puma	Greening Goliath	Sportswear and footwear	Uses recycled and recyclable materials for packaging.	Take-back programs and resale of used products.	Uses recycled and recyclable materials for packaging.	Not specified.	puma.com
Under Armour	Greening Goliath	Sportswear and footwear	Uses recycled and recyclable materials for packaging.	Take-back programs and resale of used products.	Uses recycled and recyclable materials for packaging.	Not specified.	underarmour.com
Nike	Greening Goliath	Sportswear and footwear	Uses recycled and recyclable materials for packaging.	Take-back programs and resale of used products.	Uses recycled and recyclable materials for packaging.	DyeCoo (waterless dyeing technology).	nike.com
Patagonia	Green David	Outdoor clothing and gear	Uses recycled and recyclable materials for packaging.	Repair services, resale of used gear through Worn Wear, and recycling programs.	Uses recycled and recyclable materials for packaging.	Grown.bio (mycelium-based packaging for shipping).	patagonia.com
Veja	Green David	Eco-friendly footwear	Uses recycled and recyclable packaging.	Not specified.	Uses recycled and recyclable packaging.	Not specified.	veja-store.com
Allbirds	Green David	Eco-friendly footwear	Uses recycled and recyclable packaging.	Take-back programs and resale of used products.	Uses recycled and recyclable packaging.	Not specified.	allbirds.com

BRAND APPLICATIONS 2/2

Sustainability Brand in the Sporting Goods Industry	Segmentation	Main Business Activity	Sustainable Packaging Solutions	What Circular Services Do They Offer	What Circular Packaging Solutions Do They Offer for the Circular Services	Which Solutions and Companies Do They Use for Their Circular Service and Product Offers	Weblink
Vivobarefoot	Green David	Eco-friendly footwear	Uses minimal and recyclable packaging.	Repair services and resale of used shoes.	Uses minimal and recyclable packaging.	Traceless Materials GmbH (biomaterials for packaging).	vivobarefoot.com
Outerknown	Green David	Sustainable clothing	Uses recycled and biodegradable packaging materials.	Repair services and resale of used clothing.	Uses recycled and biodegradable packaging materials.	Not specified.	outerknown.com
Tentree	Green David	Sustainable apparel	Uses compostable and recyclable packaging.	Take-back programs and resale of used products.	Uses compostable and recyclable packaging.	Not specified.	tentree.com
Girlfriend Collective	Green David	Activewear	Uses recycled and recyclable packaging.	Not specified.	Uses recycled and recyclable packaging.	Not specified.	girlfriend.com
Pangaia	Green David	Sustainable clothing	Uses recycled and recyclable packaging.	Not specified.	Uses recycled and recyclable packaging.	Not specified.	thepangaia.com
Reformation	Green David	Sustainable fashion	Uses recycled and recyclable packaging.	Take-back programs and resale of used products.	Uses recycled and recyclable packaging.	Not specified.	thereformation.com
Fimbulvetr	Green David	Snowshoes	Uses recyclable packaging.	Repair services.	Uses recyclable packaging.	Not specified.	fimbulvetr.no
NZERO	Green David	Snow sports waxes	Uses recyclable packaging.	Not specified.	Uses recyclable packaging.	Not specified.	nzero.eco
Tierra Products	Green David	Outdoor clothing	Uses recyclable packaging.	Not specified.	Uses recyclable packaging.	Not specified.	tierra.se
Grown Outdoor Creativity Lab	Green David	Outdoor gear	Uses recyclable packaging.	Not specified.	Uses recyclable packaging.	Not specified.	grownoclab.com

EXISTING NON-SUSTAINABLE VS. SUSTAINABLE PACKAGING SOLUTIONS

Brand	Current Packaging	Sustainability Level	Sustainable Alternative	Alternative Provider	Provider Link
Nike	Traditional plastic bags and boxes for shoes and apparel	Business as Usual (Sustainability 0.0)	Waterless dyeing technology for packaging materials	DyeCoo	dyeCoo.com
Adidas	Plastic wraps and non-recyclable boxes	Sustainability as Usual (Sustainability 1.0)	Seaweed-based packaging, biodegradable and compostable solutions	Notpla	notpla.com
Under Armour	Single-use plastic bags and non-recyclable packaging	Business as Usual (Sustainability 0.0)	Biomaterials from plant residues, natural alternative to plastics	Traceless Materials GmbH	traceless.eu
Puma	Plastic packaging with limited recycling options	Sustainability as Usual (Sustainability 1.0)	Compostable replacements for plastic using seaweed, circular economy solutions	Sway	swaythefuture.com
Patagonia	Recyclable materials but not fully circular	Sustainability Triple Bottom Line (Sustainability 2.0)	Mycelium-based packaging solutions, 100% compostable and CO2-efficient alternatives	Grown.bio	grown.bio

O N R U N N I N G

- **RECYCLABLE MATERIALS:** 100% recycled cardboard, fully recyclable
- **DIGITAL INSERTS:** QR codes instead of paper - less waste, always up-to-date
- **LOCAL PRODUCTION:** Shorter transportation routes, lower CO₂ emissions



P U M A - C L E V E R L I T T L E B A G

- **MATERIALS:** Consists of recycled cardboard (tray) and robust PET polyester (bag)
- **MATERIAL SAVINGS:** Saves paper, energy and water every year by reducing packaging material
- **REUSABLE & PRACTICAL:** The fabric bag replaces plastic bags and serves as a carrier bag



ADIDAS X PARLEY

- **RECYCLING OCEAN PLASTIC:** adidas uses recycled ocean plastic for products and packaging, reduces plastic waste
- **SUSTAINABLE PACKAGING:** Eco-friendly packaging made from recycled plastic
- **DESIGN & INNOVATION:** Modern, minimalist design combined with real environmental impact



NIKE – ONE BOX

- **PACKAGING CONCEPT:** Nike uses a shoe box that also serves as a shipping box, reducing packaging material and transport volume
- **SUSTAINABILITY:** The one box system reduces material consumption and CO₂ emissions
- **SPECIAL FEATURE:** The packaging is made from 100% recyclable materials



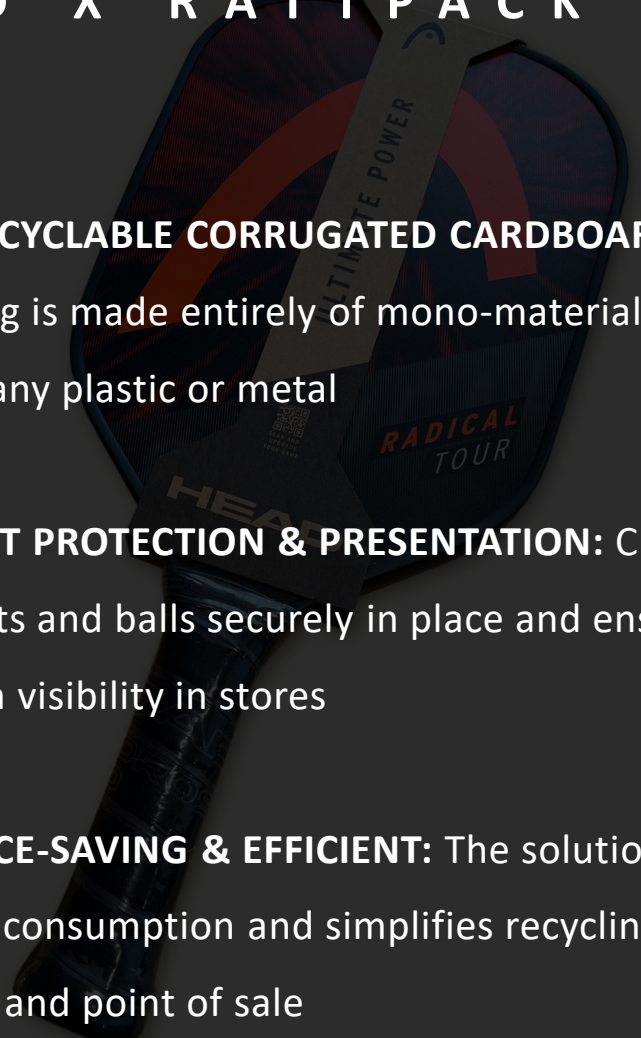
PATAGONIA - BASELAYER PACKAGING

- **MINIMALIST PACKAGING:** Patagonia dispenses with elaborate packaging and uses recycled paper bags and ribbon labels instead of plastic sleeves
- **SUSTAINABILITY IN DESIGN:** Products are packaged in simple, reusable materials, which reduces waste and conserves resources



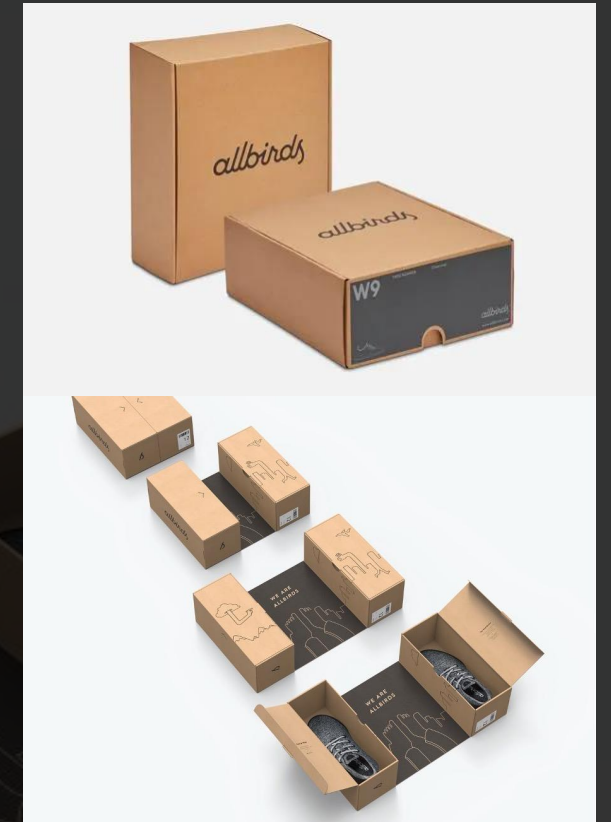
HEAD X RATTPACK

- **100% RECYCLABLE CORRUGATED CARDBOARD:** The packaging is made entirely of mono-material and does not use any plastic or metal
- **PRODUCT PROTECTION & PRESENTATION:** Clever design holds bats and balls securely in place and ensures optimum visibility in stores
- **RESOURCE-SAVING & EFFICIENT:** The solution reduces material consumption and simplifies recycling - ideal for shipping and point of sale



A L L B I R D S

- **ECO-FRIENDLY MATERIALS:** Boxes are made from 90% recycled cardboard or compostable paper and printed with soy-based ink
- **FUNCTIONALITY AND EFFICIENCY:** The packaging is both shipping and shoe box, fits many sizes, and saves materials and CO₂
- **CONSCIOUS UNBOXING:** It shares material and carbon footprint info and reinforces the brand's sustainability promise

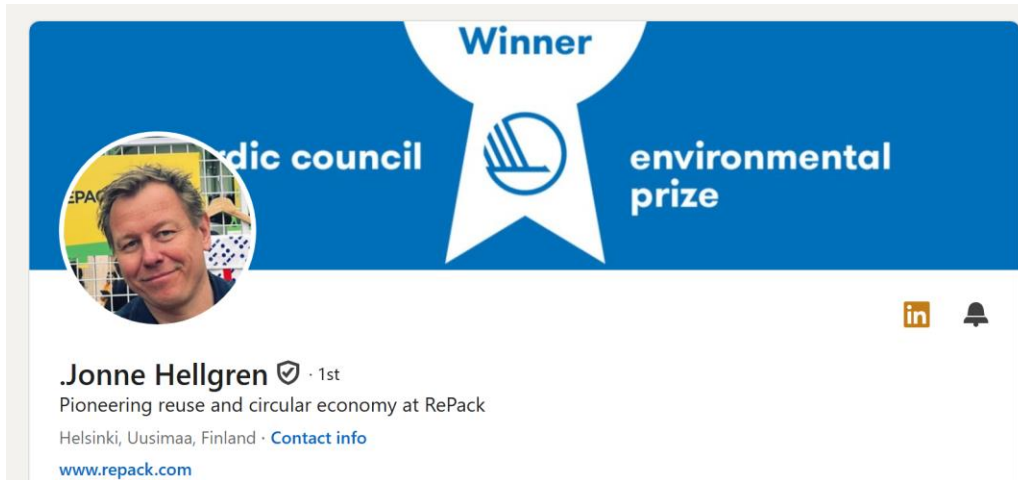




LUNCH & LEARN SESSION:

LEVERAGE
SUSTAINABLE
PACKAGING
TO GROW
CONSUMER TRUST
AND MARKET SHARE

RePack - Pioneering Reusable packaging solutions

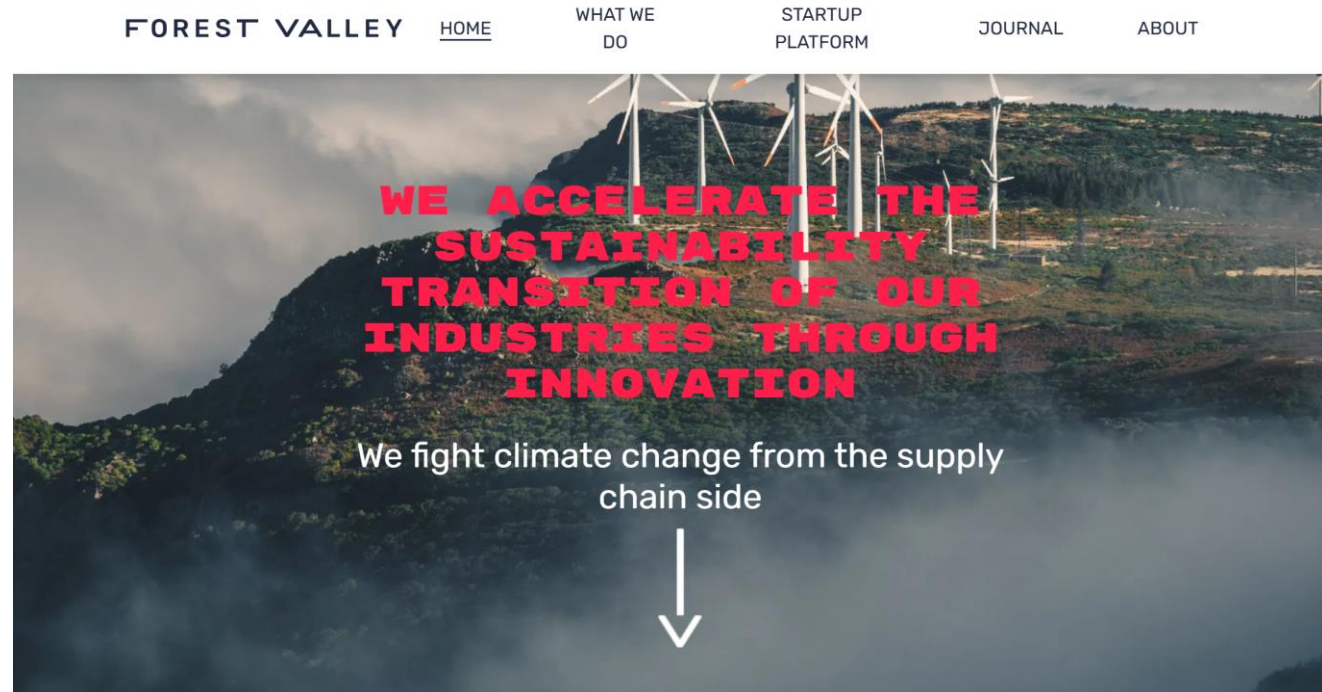


A LinkedIn post from Jonne Hellgren, a 1st-degree connection. The post features a blue banner with the text "Winner" and "Nordic council environmental prize" next to a circular profile picture of Jonne Hellgren. The text of the post reads: ".Jonne Hellgren · 1st Pioneering reuse and circular economy at RePack Helsinki, Uusimaa, Finland · Contact info www.repack.com". There are icons for LinkedIn and a notification bell.

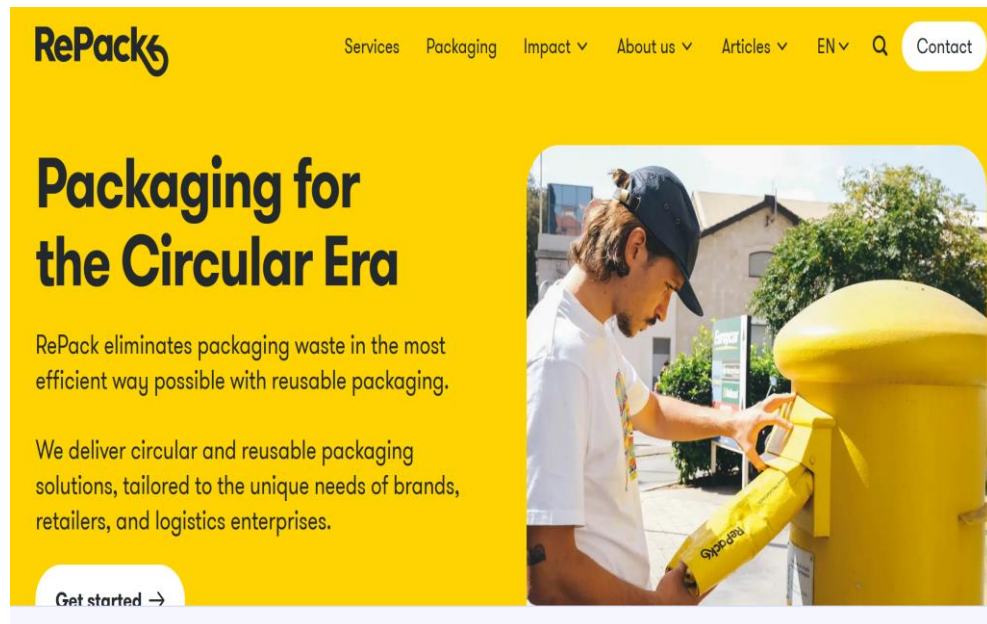
Forest Valley Institute



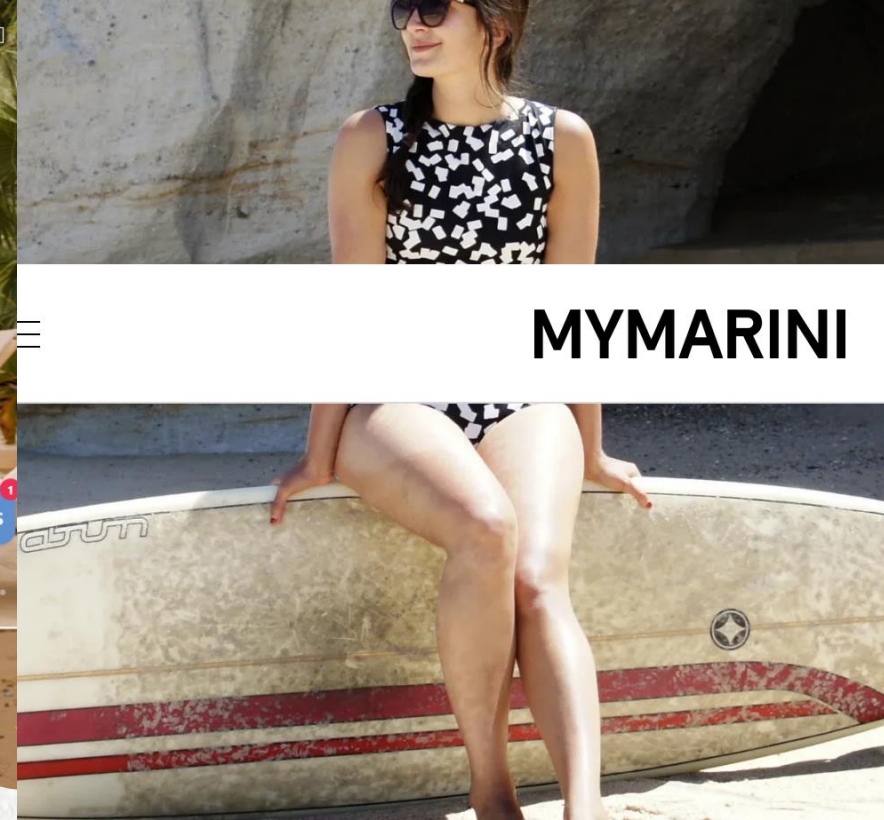
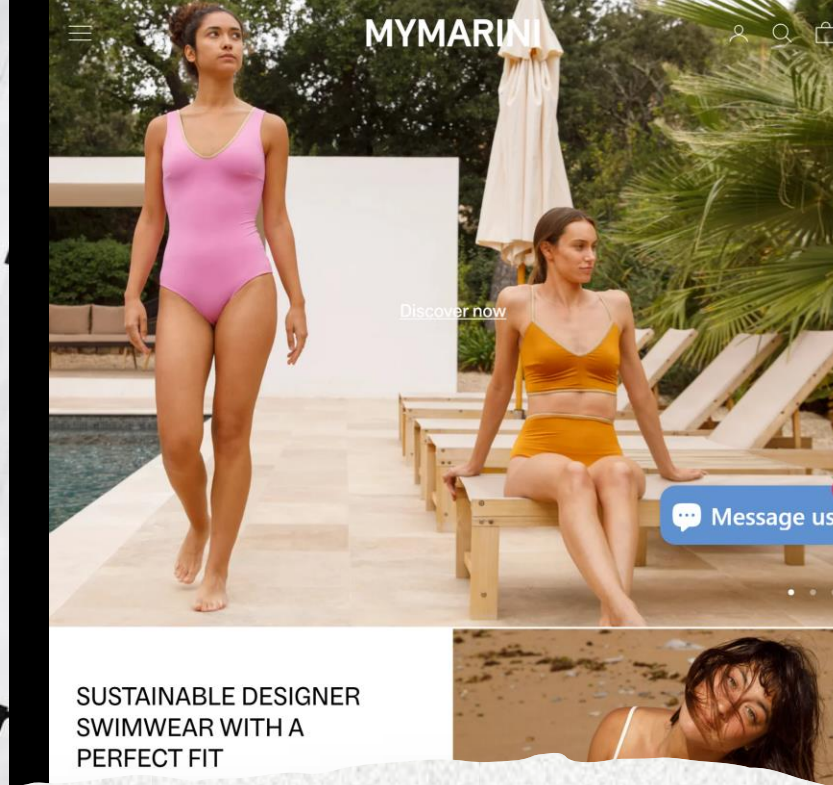
A LinkedIn profile for Serena Rebecca Moro, a 1st-degree connection. It features a circular profile picture of her against a yellow background. The text below reads: "Serena Rebecca Moro · 1st Sustainability Strategies @Cikis Studio | Partner @Forest Valley Institute | Sustainability Consultant | CSO (Chief Sustainability Officer) | Entrepreneur".



The hero section of the Forest Valley Institute website. It features a navigation bar with "FOREST VALLEY" and "HOME" (underlined), followed by "WHAT WE DO", "STARTUP PLATFORM", "JOURNAL", and "ABOUT". The main content area has a background image of wind turbines on a hillside. Overlaid text in red reads: "WE ACCELERATE THE SUSTAINABILITY TRANSITION OF OUR INDUSTRIES THROUGH INNOVATION". Below this, in white, it says "We fight climate change from the supply chain side" with a white downward-pointing arrow.



The hero section of the RePack website. It features a yellow background. The "RePack" logo is in the top left. Navigation links include "Services", "Packaging", "Impact", "About us", "Articles", "EN", and "Contact". The main headline is "Packaging for the Circular Era". Below it, text reads: "RePack eliminates packaging waste in the most efficient way possible with reusable packaging. We deliver circular and reusable packaging solutions, tailored to the unique needs of brands, retailers, and logistics enterprises." A "Get started →" button is at the bottom left. On the right, a photo shows a man in a white shirt and cap using a yellow RePack station.



[RePack - Pioneering Reusable packaging solutions](#)

[MYMARINI - Sustainable designer swimwear - OFFICIAL SHOP](#)

My Marini, a German swimsuit company, has been using RePack since 2022. 30% of their customers have chosen reuse, and they offer a rewarding offer of paying €4 for RePack and giving €20 voucher for the next purchase once the empty RePack is returned. 70% of RePack users use the voucher and buy again. This has the same impact on the bottom line as replacing the usual "get 10% off by subscribing to a newsletter", but it's more exciting and sustainable too.

home - S.Lab. Packaging, made to disappear.



Oleksandra Barabash 2nd
Marketing Comms @ S.Lab
Kyiv, Kyiv City, Ukraine · [Contact info](#)

Home Our Solutions ▾ Industries ▾ About Blog Contact

Packaging, made to disappear.

Your sustainable and biodegradable packaging solution.

Explore Our Solutions →



Google for Startups

L'ORÉAL



techstars

BMW Foundation
Herbert Quandt



There is **always** a better way.

We produce a truly green packaging using only two plant based components, which are **agricultural waste** and mushroom roots.

Mycelium

Mycelium is the root-like structure of mushrooms made out of thousands of tiny threads serving as a binding agent.

Agricultural Waste +



100% Organic Packaging +



Studio Nima



Leonhard Nima 1st
Studio Nima & N3XTCODER

HOW DO YOU BUILD

Home Services Team Space Projects Contact

POSITIVE FUTURE?

We develop impactful social innovation and social business solutions

At Studio Nima we explore innovative ideas to tackle some of the world's most pressing problems and make sure these ideas become reality.

Home Services Team Space Projects Contact

IMPACTFUL SOCIAL INNOVATION SOLUTIONS

About Us | Seaman Paper



Ester Milano  · 1st
Let's talk reducing plastics: empowering plastic-free fashion supply chains.

Seaman PAPER | Products Industries Sustainability About Careers [Contact us](#)

People, Paper, Packaging, for a sustainable world.

Seaman PAPER | Products Industries Sustainability About Careers [Contact us](#)

It's time to rethink paper and packaging.

Seaman Paper is a leading global manufacturer of environmentally sustainable specialty paper and packaging solutions – helping customers protect what's most important to them.

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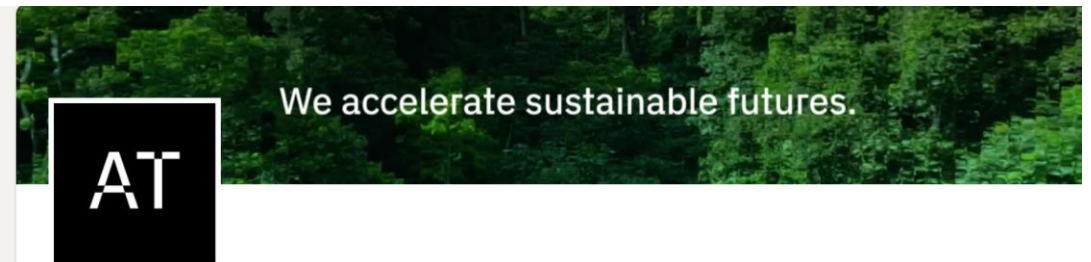
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