



H&M FOUNDATION



FROM SIGNALS TO SYSTEMS CHANGE

How emerging shifts and
changemakers are reshaping
the future of textiles

AN INSIGHT REPORT FROM THE
H&M FOUNDATION & ACCENTURE
OCTOBER 2025

IT'S TIME FOR SYSTEMS CHANGE

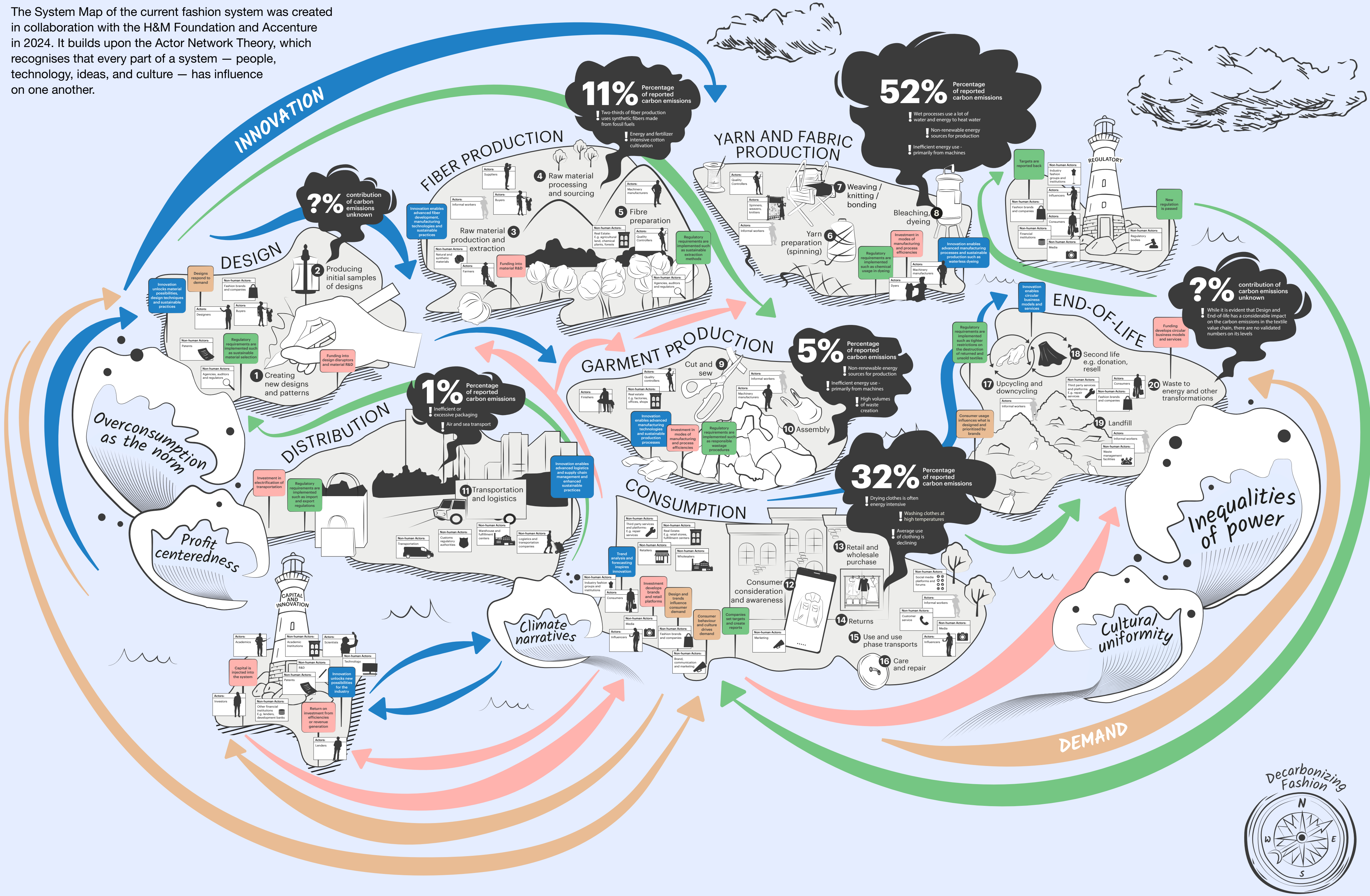
Transforming fashion requires more than innovation, it requires reimagining the entire system. The industry is full of promising ideas, but to unlock real impact, we must connect and scale them across the value chain.

The System Map is our way of showing the current fashion system as it is: a web of interconnected actors, materials, and forces. By visualising where carbon emissions concentrate and where collaboration can have the biggest impact, it helps us see the whole picture, not just the parts. But the map isn't a solution, it's a compass. It shows where innovation can drive decarbonisation and a just transition for both people and planet.

Together with our Global Change Award (GCA) changemakers and Accenture, we've reimagined what this system could become if early-stage innovations were scaled. The Reimagined System Map is on [page 5](#) and it's an open invitation to collaborate, challenge, and create the future of fashion together. Explore where your organisation fits within this evolving system and how you can help shape it.

Carbon emissions data is based on an indicative industry assessment, consolidated by Accenture in partnership with H&M Foundation as input to the Global Change Award (February 2024). Carbon emissions percentages are estimated based on external sources, including UNEP Sustainability and Circularity in the Textile Value Chain, 2023 and Environmental Assessment of Swedish Clothing Consumption – Six garments, Sustainable Futures, 2019 (for use-phase transport estimations). While the information shown on this map has been reviewed by industry experts, supported by data, and created with systems methodologies, the content is illustrative and not exhaustive. Some editorial decisions have been taken for creative and legibility purposes.

The System Map of the current fashion system was created in collaboration with the H&M Foundation and Accenture in 2024. It builds upon the Actor Network Theory, which recognises that every part of a system — people, technology, ideas, and culture — has influence on one another.



THE SYSTEM IS EVOLVING

Here are the key signals of change we are seeing

Across the textile value chain, signals of change are revealing what's next. They reveal an industry on the brink of reinvention, exposing the system's fragility but also its capacity to adapt. Crucially, no single innovation can transform fashion alone. Viewed through the lens of our GCA changemakers, they show how innovation, collaboration and systems thinking can turn disruption into transformation, laying the groundwork for the Reimagined System Map that follows.



1. Accenture research, 2025.
2. European Commission, Corporate sustainability due diligence, 2024.
3. India's carbon credit trading system scheme (CCTS), 2025.
4. Down To Earth, Unusual heat scorches Bangladesh as April's consecutive heatwave breaks 76-year record, 2024.
5. International Labour Organization, Working on a warmer planet: The effect of heat stress on productivity and decent work, 2019.
6. Government of Japan, Japan's OECM and related policy, 2025.

CHANGEMAKERS ARE CATALYSTS FOR SYSTEMS CHANGE

The Global Change Award is built on a simple belief: when bold ideas meet the right support, they can transform the system. Every year, ten changemakers step forward with innovations that challenge the status quo, from waterless recycling and regenerative materials to digital tools that make transparency tangible.

To reach net zero, the industry must go through massive transformation that reduces emissions without causing harm in other areas. A just transition ensures that progress for the planet also means progress for people. It promotes decent work, safeguards the environment, and addresses inequalities while regenerating ecosystems and upholding human rights.

These changemakers are not only reducing carbon emissions; they are redefining what a fair and regenerative fashion system can look like. Together, they remind us that transformation starts small, with an idea, a spark, and the courage to keep going.

Meet the winners of Global Change Award 2025



A Blunt Story
Bio-based soles made from agricultural waste, plant-derived and recycled materials.



Brilliant Dyes
Natural dyes from algae, made with low-energy extraction.



CircularFabrics
High-quality nylon recovery from blended textile waste.



Decarbonization Lab
An R&D hub pioneering low-emission dyeing, finishing and textile treatment.



DecoRpet
Energy-efficient decolouring that enables high-quality recycled PET to the industry.



Loom
Digital upcycling connecting wardrobes with designers.



PulpaTronics
Metal-free RFID tags laser-printed on paper for low-impact traceability.



Renasens
Waterless recycling of blended textile waste into high-quality raw materials.



The Revival Circularity Lab
Tackling the global textile waste crisis through community-led upcycling and education in the Kantamanto Market.

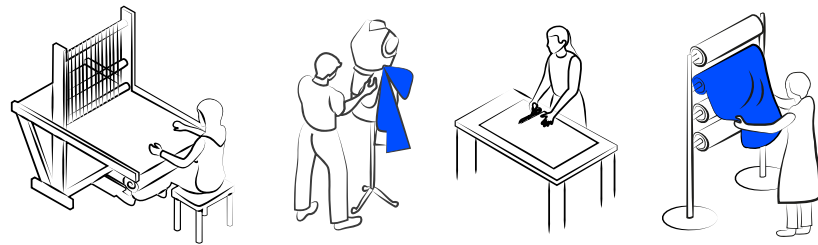


Thermal Cyclones
Electric heat pumps replacing fossil-fuel steam with energy-efficient heat.

To understand what early-stage innovation can achieve at scale, Accenture applied its 360-degree value approach to estimate the potential impact of four of the GCA changemakers if given the opportunity to grow. The findings show that small ideas, when supported early, can deliver outsized returns for both climate and communities. While the figures are illustrative, the message is clear: when changemakers thrive, systems change follows.

Impact potential:

The Revival Circularity Lab



PEOPLE: Empowered local expertise, like artisans, creators, and communities, through training, creative opportunities, and fair livelihoods. Scaling upcycling and recycling, diverting textile waste from landfills, through a just transition.

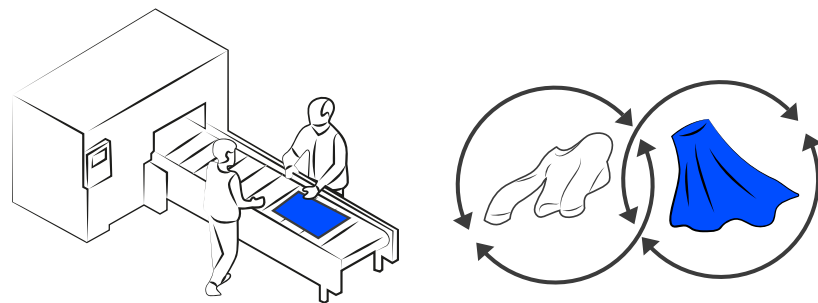
Loom

CLIMATE: 570,000 metric tons of CO2 emissions saved annually in 2050. Comparable to the total life-cycle impact in CO2 emissions of 170 million cotton t-shirts.



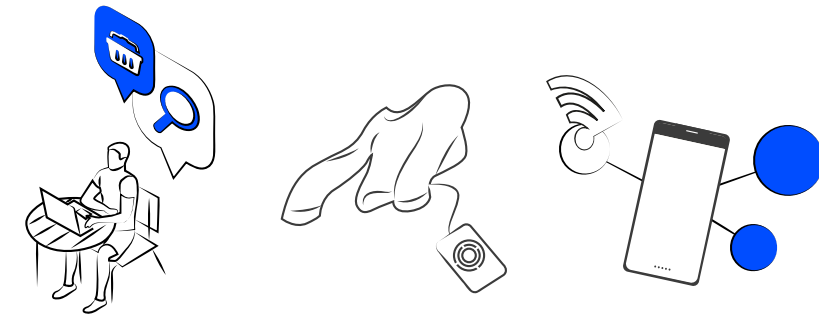
DESIGNER JOB OPPORTUNITIES: 30,000 designers can generate revenue via Loom's platform annually in 2050, empowering individual designers to become more independent.

Renasens



WATER: 160 billion litres of water saved annually in 2050 from using a waterless process, compared to chemical recycling techniques for cotton and polyester. Comparable to average annual drinking water consumption of 200 million people.

Pulpatronics



E-WASTE REDUCTION: 3,000 tons of e-waste reduced annually in 2050. Comparable to the total e-waste of 18 million smartphones.

The impact potentials supplied by Accenture consist of assumption-based estimates and are not intended to be statements of fact or recommendations regarding any specific innovation.

THE REIMAGINED SYSTEM MAP

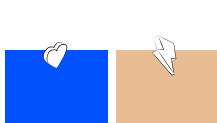
Together with Accenture and our Global Change Award changemakers, we reimagined the System Map to show how the textile industry could look if bold innovations were scaled. This is not a prediction. It's an invitation to imagine and to act.

How the map works:

There are 5 layers

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1. Value chain: The stages that guide a fashion item from design to extending life.
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2. Systemic forces: The cultural and economic currents shaping fashion.
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3. Key messages: Important changes that have shaped how the fashion system is being reimagined. Blue is when the change relates to a specific point in the system. Brown is when the change happens across the system.
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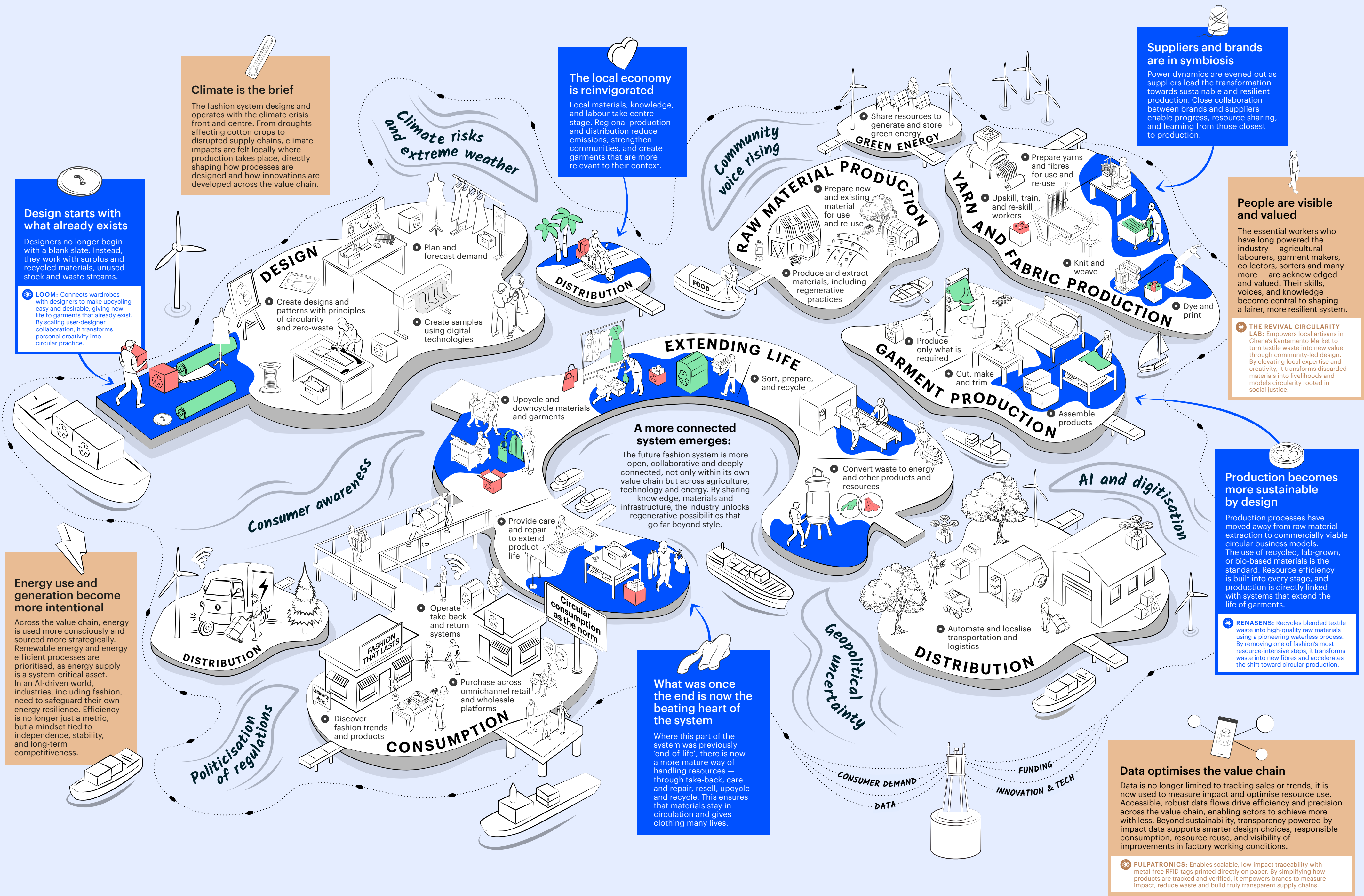
4. Buoys: Data, innovation, funding and demand flowing through the system.
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5. GCA changemakers
Examples showing transformation in action.

How the map was made:

This map was a creative collaboration between Changemakers, Accenture and the H&M Foundation. The map builds on Actor Network Theory, which recognises that every part of a system — people, technology, ideas, culture — has influence on one another.

It offers an alternative future, not a fixed truth. You may see the system's future differently, and that's okay too. By sharing this vision openly, the H&M Foundation invites others to test, change and build on it.



S🌐 HOW CAN YOU MOVE THE NEEDLE?

Change starts with understanding the system and the part you play within it. The Reimagined System Map is an open tool to explore where innovation and collaboration can make the greatest difference. Once you see your place in the system, the next step is to act.

Use the map to start conversations within your organisation, across your supply chain, or with your community. Every discussion can spark action that brings a decarbonised, just textile system closer to reality.

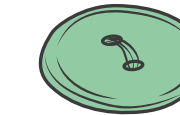
At the H&M Foundation, we continue to use philanthropy as risk capital to help early-stage innovations grow. But no single actor can transform the system alone. Real change happens when many players, innovators, brands, investors and communities, move together.

The tools, insights and changemakers are here. What happens next depends on all of us. The future of fashion won't be shaped by one actor or one idea but by many bold steps, taken together.

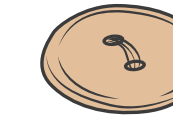
Questions for meaningful discussion:



Where in the system do you have the most power to influence change?



How can you support changemakers and early-stage innovations to scale?



What is one action you can take today to move the needle?



Who must you collaborate with to turn ideas into action?



If you were to reimagine the textile system for a decarbonised future, what change would you prioritise first?



What decision can you make today that signals real commitment to transformation?