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Collaborative consumption for small and medium-sized fashion enterprises in South Korea

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1. Introduction

Sustainability in the fashion industry is challenging due to numerous problems, which entail both complex production and consumption processes in a global context. Over the past decade, clothing consumption patterns have changed considerably, influenced by the disposable fast fashion phenomenon. In recent decades, the need to incorporate sustainability in business practices in the fashion industry has become increasingly clear. The concept of a ‘circular economy’ (CE) has been promoted to highlight the need to find an alternative approach for recovering or regenerating resources for the maximum value of the clothing life (WRAP, 2016). This concept has attracted increasing attention because of the need to reduce waste and optimise resource productivity while achieving a competitive advantage and reducing the negative environmental effects of clothing production and consumption (WRAP, 2016). The demand for sustainability in business practices and creative ways of promoting sustainability has thus grown in many organisations.

This paper focusses on alternative approaches to revitalising the economy as well as consideration of the environmental and social impacts of clothing on the sharing economy when purchasing, using and disposing of clothes with a more circular approach. First, this paper offers a brief background of the South Korean fashion industry and the challenges involved in

sustainable production and consumption in the fashion industry in South Korea. Second, the paper provides an overview of collaborative consumption (CC) in fashion and discusses various drivers of CC in South Korea. Third, the paper describes two case studies of social enterprises that facilitate CC in South Korea.

2. Overview of the South Korean fashion industry

South Korea has one of the world's fastest-growing economies. The textile- and fashion-related industries have made a significant contribution to South Korea's economic growth. Clothing consumption in South Korea has been increasing since 1960 and was responsible for over 40 percent of total textile and clothing exports in 1970 (cited in Jin and Moon, 2006). However, the Korean textile- and fashion-related industries are currently losing their competitive advantages due to challenges resulting from increased production and labour costs, as the industries are still heavily reliant on labour-intensive manufacturing processes. Since the early 2000s, Korean Textiles and Apparel (T&A) has progressively concentrated on value-added design activities, focussing on design, marketing, branding, innovation and creativity (Ha-Brookshire and Lee, 2011).

Similar to western high street retailers such as ZARA and H&M, current Korean fashion companies quickly produce a high volume of low-priced garments, which has led to changing consumer consumption patterns. The significant volume of textile and garment waste has progressively increased over the past decade in South Korea. The Ministry of Environment of Korea (2013) estimated that the textile and garment waste in the country was 54,677 tonnes in 2008, increasing by 17 percent to 64,075 tonnes within two years (Kim and Kim, 2016). According to the United Nations Com-trade Database (2013), South Korea is the fourth largest used clothing exporter, following the US, UK and Germany. Korea exported more than \$364 million of used garments overseas in 2013 (Rodgers, 2015). The existing second-hand clothing supply chain system is unsustainable in the global context. Due to the arrival of cheap, imported

second-hand clothes, the local textile and garment industries in developing countries have fallen significantly.

In response to the global sustainability movement, there has been great pressure placed on the fashion industry by the government and the public to integrate sustainability. The Korean government has recently implemented 'Green Growth', aiming to encourage businesses to incorporate sustainability into their business activities. The major green fashion movement is often focussed on the utilisation of eco-materials (e.g. organic, biodegradable, recycled materials), eco-marketing and the upcycling of products. Na and Na (2013) conducted 396 case studies of Korean fashion companies to examine how Korean fashion and textiles companies are incorporating sustainability into their business practices. Their research shows that Korean apparel companies commonly use three major strategies for addressing issues of sustainability: 36.9% use eco-materials such as natural or recycled or biodegradable fibres, 58.6% focus on eco-marketing to reshape their brand images and 4.4% focus on the reuse of the garments through remodelling and upcycling processes. Fashion companies commonly use organic materials and green marketing to promote their green product ranges.

On the consumption side, there is a growing interest in green products in South Korea. World research (2005) showed that 58% South Korean consumers are interested in green products and 76% would like to purchase green products although the price is slightly higher than similar products (cited in Sung and Kincade, 2010). Korean fashion companies are striving to meet consumer needs related to the current green movement. However, they are still in the very early stages of implementing sustainability in their business practices and have mainly focussed on eco-product developments as part of their relatively short-term business strategies. There has been a lack of exploration of the PSS and how materials and garments can be utilised in different ways.

Furthermore, the various production and consumption issues call for alternative business models and the creation of new product, process and service systems. In particular, young enterprises are looking for new production and consumption process.

3. Approach to sustainable fashion and collaborative consumption

The term 'collaborative consumption' is also referred to as the 'sharing economy'. Felson and Speath (1978) defined CC as one or more individual exchanges or consumptions of a product or service through a process of social engagement activities with one or more users. Bostman and Rogers (2010) defined CC in more a broad context, encompassing various exchange activities including 'sharing, bartering, lending, trading, renting, gifting and swapping' in peer-to-peer marketplaces. In turn, Belk (2014) argued that this definition is too broad. For example, a gift that directly transfers ownership and CC occupies 'a middle ground between sharing and marketplace exchange, with elements of both'. He argued that CC requires people to coordinate the acquisition and distribution of a good or service. Thus, he proposed a definition of CC as 'people coordinating the acquisition and distribution of a resource for a fee or other compensation' (Belk, 2014).

Although there are various definitions and interpretations of CC, its major purpose is to facilitate a more collaborative and sustainable society through a shared economy in the social system (Heinrichs, 2013). The social engagement process enables the sharing or acquisition of products and services, ideas, knowledge and talent, skills, etc. It also helps in the reuse of resources and facilitates alternative material consumption in various ways by shifting individual ownership to shared ownership or short-term rentals promoting individual participation (Belk, 2014). This allows fashion businesses to co-produce the values of their products or services with consumers.

Botsman and Rogers (2010) suggested that CC supports alternative consumption activities by alleviating hyper-consumption and reducing environmental impacts. They offered comprehensive classifications of collaborative consumption types including PSS, Redistribution of Market (RM) and Collaborative Lifestyle (CL). First, PSS allows an organisation to provide products as services rather than selling the goods in the marketplace. In this case, consumers do not have ownership of the products but are able to temporarily access them. Thanks to the advancement of internet technology, the sharing economy is gaining popularity. The internet provides access to knowledge and allows idea sharing using the Web 2.0 communication system. Second, RM enables users to purchase pre-owned goods by exchanging money (i.e. ebay) or swapping products. Fashion companies also promote and incentivise the return and reuse of second-hand products through various campaigns. For example, M&S and Oxfam launched the Shwopping partnership, where 20 million items were collected to promote the re-distribution, reuse and recycling of unwanted garments.

Third, CL is based on sharing or exchanging intangible assets, including rental space (i.e. AirBnB), skills or ideas (i.e. Kickstarter), crowdsourcing design (i.e. Threadless) and crowdfunding fashion projects (i.e. Betabrand). Collaborative lifestyle services are commonly associated with the optimisation of intangible product usage and consumer experiences, such as personal styling services and co-creative product and service systems using crowdsourcing and peer-to-peer marketplaces.

There are various motivations for participating in CC. Hamari *et al.* (2016) suggested that CC has positive impacts on environmental issues (environmental value) through the utilisation of resources. Second, participation in CC offers enjoyment of the activity through engagement of the local community (hedonic and social value). Third, CC makes it possible to maximise economic value by supporting maximum connectivity in the community. One of the most positive indicators for participating in a CC event is its economic value. However, Hamari *et al.* (2016) showed that ecological consumption or environmental concerns are not directly associated with participation in CC. Their research suggests that strictly emphasising

sustainability issues does not directly lead to a positive attitude toward CC. Similarly, Roux and Guiot (2008) indicated that the major consumer motivation for purchasing used items is based on economic and hedonic values. Consumers that purchase second-hand goods are mainly price-sensitive and looking for treasures or bargains.

4. The rise of collaborative consumption in South Korea

The concept of CC gained considerable attention in South Korea during the global financial crisis in 2008. The social and economic issues related to the crisis encouraged people to reduce their family expenditures. Today, the idea of CC has moved more toward the social value of creating positive relations among various communities by optimising resource usage instead of wasting resources in the consumption process.

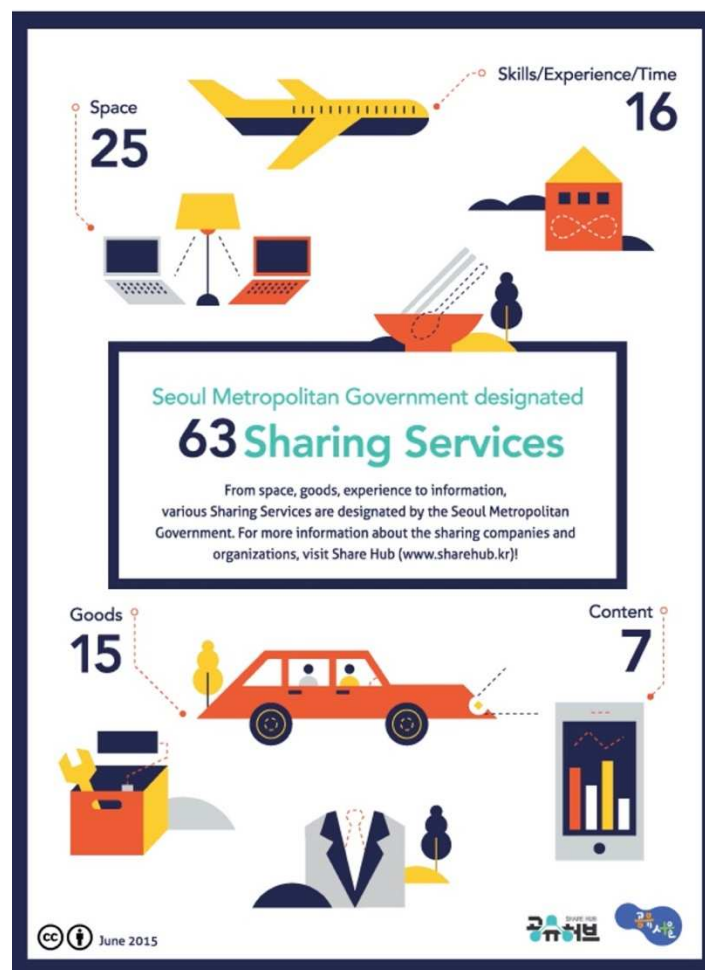


Figure 1: Seoul Metropolitan Government (SMG) sharing economy services (Image from ShareHub Korea,2017)

In the last few years there has been a progressive increase in the number of small and medium-sized businesses focussing on CC to support sustainable development in South Korea. The city of Seoul launched the 'Sharing City' in September 2012, and this concept of sharing spread to its urban policies in the public and private sectors. The purpose of this strategy was to mitigate various social issues by supporting local businesses and promoting civic engagement through the 'shared use of both public and private resources' (Share Hub, 2016).

This sharing economic platform allows the public and businesses to distribute and access products and services to promote sustainable development. Share Hub (sharehub.kr) is aiming to facilitate the sharing of products and services, intellectual skills and ideas and lifestyles. The main philosophy behind sharing activities is to support a better environment, encourage economical and conscious consumption and provide opportunities for people in society as a whole.

A sharing website developed by the Seoul government in 2013 has been widely promoting education, books, products, media, travel, art, cars, government, spaces, experiences, knowledge and skills. The Seoul Metropolitan Government (SMG) designed and supported 77 sharing services from 2013 to 2016, ranging from spaces, products, services, experiences and information to skills and more. This project facilitates cultural and economic sharing that connects the government, citizens and businesses. As a result, public sharing in Seoul has nearly quintupled since 2014 (from 326,426 citizens in 2014 to 1,556,069 in 2016) (ShareHub Korea, 2017).



Figure 2: sharing polices and their achievements (Image from ShareHub Korea, 2017)

The SMG has educated citizens through various seminars and conferences and has organised campaigns with social sharing enterprises by networking with diverse CC- and sharing economy-based organisations.

4.1 The Open Closet

The Open Closet (www.theopencloset.net) is a non-profit organisation that facilitates social innovation and tackles an important social issue. The company supports poor young jobseekers in order to minimise unemployment and social inequality. The company’s business model is based on a CE model, particularly focussing on the post-consumption process.



Figure 3: The Open Closet social enterprise business model (Image reproduced courtesy of the Open Closet, 2017)

According to *The Korea Herald* (2015), the youth unemployment rate in South Korea is continuously increasing and is currently at its highest level in 15 years. The Open Closet supports young people who are searching for jobs by helping with the economic burden of purchasing formal suits for their job interviews. The company serves young people who are socially and culturally marginalised or vulnerable and wish to find employment. One of the Open Closet's projects is targeted toward unemployed women in Korea, attempting to overcome sexual discrimination in the male-dominated South Korean society. The Open Closet was launched in 2012 and accumulated more than 2251 donors' and 11,838 renters' stories in three years.



Figure 4: Lenders and donors share stories related to their clothing (Images from The Open Closet, 2017)

The background of the operation process involved building a strong relationship with donors and lenders by encouraging active participation in the CC of suits by providing their personal stories. People donate their second-hand business suits along with their personal stories to the website. The Open Closet then cleans and repairs the suits and rents them to jobseekers at fairly low prices. Those who rent the clothes then return the items along with their personal stories.

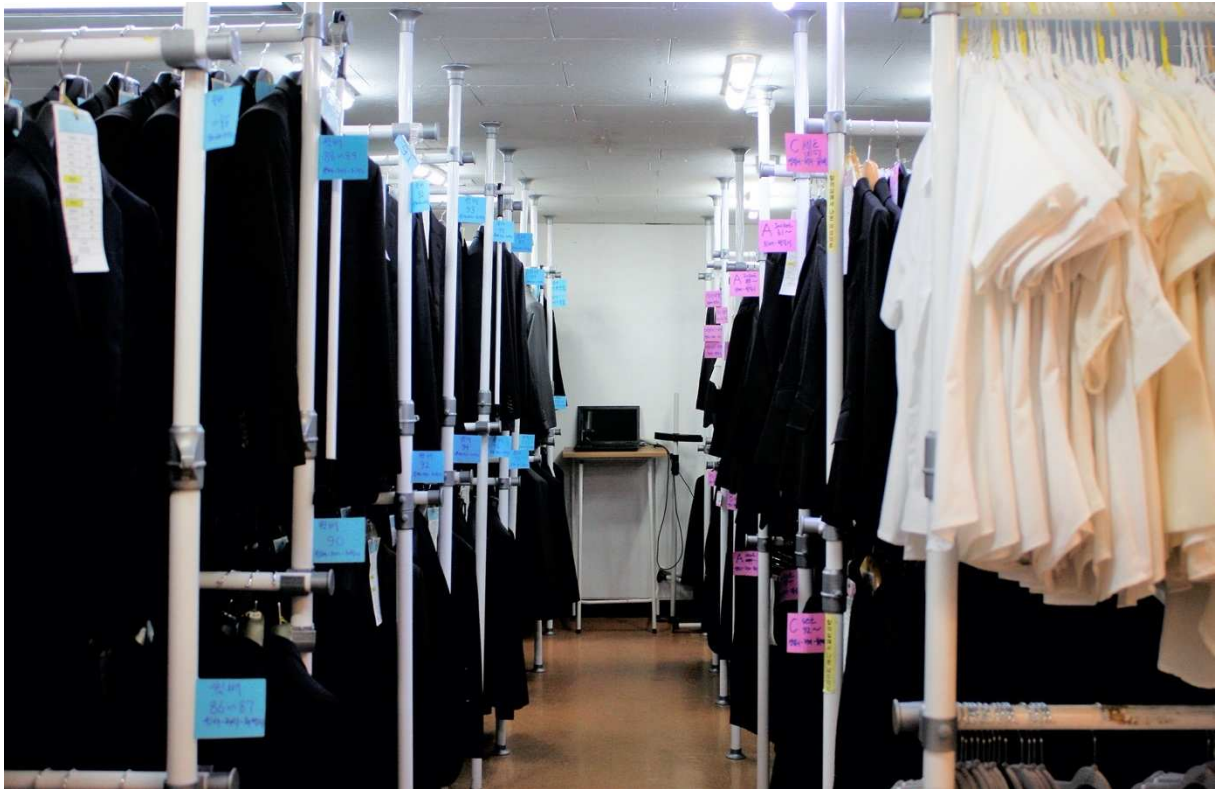


Figure 5: The Open Closet showroom and repairing process (Images from The Open Closet, 2017)

The Open Closet argues that it is not just another rental company: it aims to build a cultural movement that helps young people. The company shares the stories behind the sharing. This creates a new type of relationship between the donors and users. More than 100 stories can be related to a single suit. The sharing process itself creates very strong social bonds. The Open Closet seeks to provide a feasible solution for specifically targeted user groups and a specific product type. The company identified the gap in the general economic and CC systems in Korea – the ambiguity regarding what is shared and how the sharing occurs. The Open Closet believes that sharing all clothes is not particularly feasible, so they reduced the number of options and focussed on specific needs rather than trying to address everything. The company’s mission statement involves sharing formal clothing and thereby providing value to society.

The Business Model Canvas (BMC) (Osterwalder and Pigneur, 2010) is widely used by various enterprisers because it addresses the key areas of the activities involved in building a business

structure. The model consists of the nine principle building blocks that comprise the four major areas of a business. The four main activities include customers, offer, infrastructure and finances. Based on the nine building blocks of the business model canvas, Table 1 describes the Open Closet’s business model.

Table 1 The Open Closet’s business model

<i>The 9 building blocks of the BMC</i>	<i>Description</i>
<i>Customer segments</i>	Jobseekers or those who wish to wear formal or business suits and shoes.
<i>Value proposition</i>	Formal clothing rental company based on second-hand business outfits for interviews or special occasions. Company promotes economic, social and environmental sustainability.
<i>Channels</i>	Company website acts as a clothing sharing platform and provides showroom space for visitors.
<i>Customer relationships</i>	Building community support through social media. Focus on the satisfaction of the clothing donors and users and address their needs. Connecting and supporting citizens and organising consultancy programs or campaigns for young people who wish to find a job.
<i>Revenue streams</i>	Users pay an affordable rental fee and use crowdsource funding (i.e. GlobalGiving) for donations
<i>Key resources</i>	Formal clothing, storage space, online interface and various volunteers.
<i>Key activities</i>	Repair and upcycle garments and shoes for other users. Attract individual, community and organisational donors. Promote and spread its business idea using various media to motivate active participation. Form online and offline communities.
<i>Key partnerships</i>	Other non-profit organisation platforms to obtain funding. Collaboration with designer brands and other organisations.
<i>Cost structure</i>	Non-profit organisation that maintains its business based on individual and organisational donations.

The Open Closet’s average target customers are mainly 20 to 30 years of age, but the company serves individuals from 14 to 70 who are looking for formal clothing. Approximately 80 consumers visit the showroom office daily, and around 50,000 people have used the service since 2013 (*The Seoul Economic Daily*, 2017). The company’s revenue stream is based on clothing rental services. The costs include renting the showroom office, staff salaries,

maintenance and promoting the business. The company was initially supported by individual clothing donors but is now receiving donations from organisations and fashion design companies.

4.2 Kiple

Kiple (www.kiple.net) is a peer-to-peer collaborative consumption platform that enables users to share children's products that are still good quality but no longer used. The company was established in 2011, and people currently share more than 204,000 products. Children generally grow very quickly and consequently a child's clothes can only be worn a few times due to the size issue. This online platform allows users to buy and sell second hand or recycled children's products with a relatively low exchange cost in order to reduce parents' economic burden and optimise resource usage.

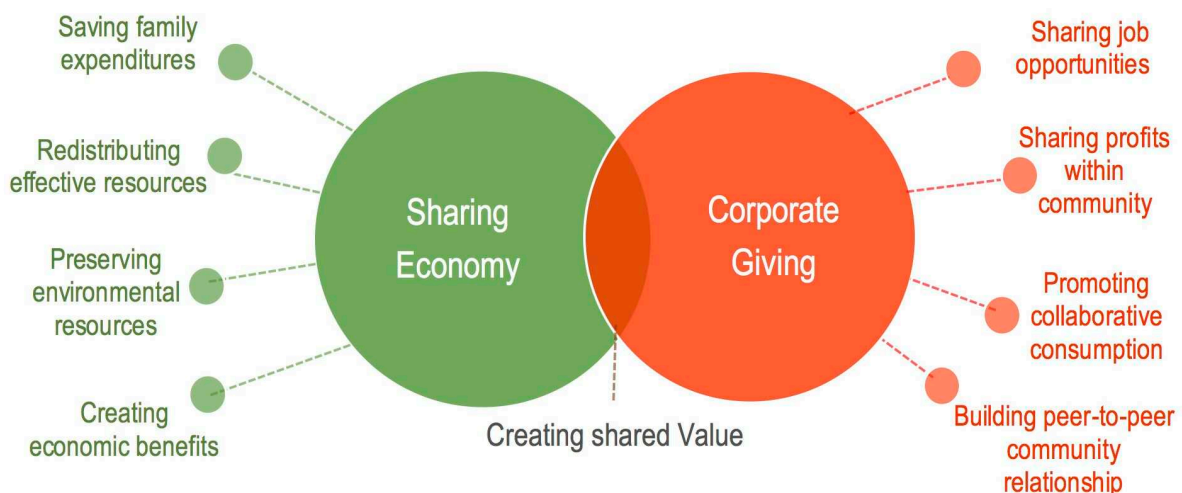


Figure 7: Kiple social enterprise business model (Image from Kiple, 2017)

The owner of Kiple noted that the starting of their business was very smooth as there were not many collaborative consumption business models available for kids' clothes. However, Kiple identifies several weaknesses of their initial business model to sustain their organisation for long term future. First, an existing Peer-to-Peer (P2P) sharing service often requires a lot of

inconvenience to consumers as they are required to upload each product image and the product's information online. Second, the majority of consumers shared kids' products as a bundle but the product qualities are often not consistent. They realise that a single product return method is also required for each product. Third, some users had barriers when purchasing products in their initial business model which was completely based on the P2P sharing platform. If someone does not share any products they could not use the Kiple service. Finally, their P2P model was based on a low profit structure per transaction and the cost often increased due to a frequent Peer-to-Peer (P2P) delivery process (Lee, 2013).

After several improvements of the existing P2P business model, Kiple is able to offer a more effective collaborative consumption service. When users send second hand clothes to Kiple, they select good quality products. Depending on the products' levels of quality, condition and brand, they provide 50-80% of Kiple money which is virtual money and obtain membership points. The ranking money system is based on the product's quality that is categorised as Best: provides 80% of Kiple money, Better: 70% of Kiple money, and Good: 50%. Both sellers and buyers cannot exchange actual money for selling and purchasing the products.

Kiple encourages to categorise product types based on children's clothing, books, toys, baby products and others. They provided clear distinguished guidelines on what items of clothing can be shared. Users can enjoy shopping using Kiple money and share stories that are pertinent to the clothing. The purchasing and selling process is very simple and user friendly. Existing second hand trading services are often too time consuming, but Kiple only requires the user to complete a simple pick-request form, and then a courier can collect the items at a convenient time. Users can search for a product based on age, gender, season, colours, product type and brand name. The company adopted the circular economy model and sharing stories of the products. The major building blocks of Kiple's business model is shown in table 2.

Table 2: Kiple's business model

<i>The 9 building blocks of BMC</i>	<i>Description</i>
<i>Customer segments</i>	Customers are mainly parents, and consumers are children
<i>Value propositions</i>	This method of e-commerce provides users purchasing and selling second-hand children's clothing through peer-to-peer collaborative consumption.
<i>Channels</i>	E-tailing business and social media
<i>Customer Relationships</i>	Providing sharing closet platform and connecting sellers and buyers for children's recycled products and create memberships
<i>Revenue Streams</i>	Consumers purchase second-hand children's clothing
<i>Key Resources</i>	Maintain storage spaces, an online interface and service management team
<i>Key Activities</i>	Quality control management for second hand goods Form peer-to-peer online and off-line community relationships between buyers and sellers Promote and spread its business idea using various media types to motivate active participation.
<i>Key partnerships</i>	Partnerships with sharing oriented business
<i>Cost structure</i>	Parents can sell and purchase their kids' products using the credit points

5. Discussion

Collaborative Consumption (CC) can provide an alternative consumption process through utilising effective resources via redistribution of products or increased serviceability of the products. Open Closet uses the Product-Service System (PSS) of CC through renting formal suits. In this case, the amount of usage per garment will be significant. As the product is primarily used for special occasions, the rental service can be very convenient. This approach is mainly focusing on maximisation of the positive consumer experiences during the post consumption process through supporting the online and offline community of jobseekers. The finding of the research shows that the specialised product ranges and the targeted consumer group are significant factors for operating a collaborative consumption business rather than trying to offer all product ranges in non-segmented markets. Open Closet consumers mostly prioritise the social and economic values as a sustainable alternative solution. The sharing

experiences helps to maximise the emotional attachment of the rented product as each clothing contains a unique sentimental story. Open Closet optimises the various social activities, collaborating with other organisations in order to promote social integration with outcasts.

Kiple offers second hand children's clothing via redistribution of the used products. The usage intensity per garment will be less optimal than the PSS model but kid's clothing is used in a specific period and is more relevant to the Redistribution markets (RS) model. Small Medium sized Social Enterprises often face a greater chance of the business failure risks and there are various barriers involved in facilitating collaborative consumption. Kiple quickly responded to the consumer needs and updated their business model for more effective services for the Peer-to-Peer based sharing market place.

In the last few years, the perception of second-hand goods in South Korea has changed significantly thanks to vintage clothing trends. Younger consumers are slowly taking more interest in second hand clothing, however, there are still niche markets and various challenges involved in collaborative the consumption process and second-hand clothing market sector. According to Kim and Kim (2013) research, younger consumers tend to have more negative perceptions toward second hand clothing as they used to purchase the fast fashion products. However, their research identified that people who had experiences of purchasing used garments have more a positive perception of the second-hand goods.

6. Conclusion

This paper discusses the opportunities and challenges involved in Collaborative Consumption in the South Korean market. Both Open Closet and Kiple have successfully implemented the social enterprise model, and have specifically targeted social issues while concentrating on product type for differentiation. The Collaborative Consumption movement has been transforming our production and consumption process through networking and building P2P

communities. In particular, web 2.0 online technology enables users to participate in collaborative consumption processes including purchasing, wearing, maintaining, sharing and updating of our clothing until the end of the item's life cycle. Implications of the research is that management of the consumption process and customer experiences are significant in maintaining the long term future of sustaining a collaborative consumption business. The second-hand service design system as an area of academic research is still in its early stages; there potentially exists an opportunity to build alternative customer-to-customer (C2C) businesses and a shared economic system that has a positive impact on environmental and social elements.

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