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Made-in-Canada System Ecology

Explorations of the Garment Industry

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Abstract

The contemporary Made-In-Canada (MIC) local garment system is a vast departure from what Canada had in place 40 years ago. In the 1970's, 70% of the Canadian consumer clothing demand was met with domestic production [Wyman, 2009]. At the time, both production capacity and labour skills existed inside of Canada, whereas in today's market, these skills are significantly outsourced by Canadian businesses. This shift - driven in part by the capabilities available from globalization - has shrunk the domestic manufacturing sector in Canada, carrying with it many long-term economic, environmental and social implications. This paper examines the MIC system as it pertains to the garment industry; understanding how the current consumer market interest in fashion-forward timeliness and focus on price are impacting the garment system in Canada. This research also explores the dominant stakeholders influencing consumers' ability to make informed choices about their garment purchases, particularly those which label themselves, Made-In-Canada.

Three findings were revealed through the research process: a) Globalization is a critical driver in the system as deregulation made it difficult for local manufacturers to stay competitive; b) Consumer perceptions of value are driving demand for cheap prices as they are limited by what they see in the market; c) The MIC system in the garment industry is a 'black box' for consumers who are challenged to make an informed choice with a lack of access to information. As a result of this examination, the research identified emerging opportunities and interventions to assist consumers in making choices about their MIC garments in the future. Due to scope, the interventions identified in this paper initiate from the government, a key stakeholder, with a emphasis on possible policy interventions.

Introduction to the MIC System in the Garment Industry

To investigate the current state of the Made-In-Canada (MIC) system, the research steps included:

1) agreement on the defined boundaries of the MIC system, 2) identification of the relevant stakeholders and their interwoven relationships within these boundaries, 3) examination of the manufacturing practices for three well-known Canadian companies to create a wider perception on the topic, and 4) exploring consumer perception of the term 'MIC' through an online survey.

The following boundaries were identified in order to frame the scope and context of our exploration:

- (1) Canadian Garment Industry
- (2) Canadian Marketplace
- (3) Canadian Consumers

Garments serve several functions in the everyday lives of Canadian people. Among these functions are forms of cultural expression, the extension of social beliefs and most practically as a source of protection from various environmental conditions. The global fashion market is in constant flux as cultural influences meet new technological innovations. The Canadian fashion market is no stranger to these shifts. In the 1960s for instance, 70% of clothing was made in Canada [Wyman, 2009] in contrast to 2014, where the domestic market share was only 11.3% [Statcan, 2015]. In order to uncover why the current norm has become a default to producing garments internationally, it was necessary to identify what the critical drivers in the garment industry are today. During this initial exploration, research revealed that the MIC industry is more than just a label in a garment, but a complex system influenced by various drivers and actors. Globalization and the rapid, mass movement of information and goods were identified as a critical driver, revealing many uncertainties for the future of the industry with the rapid rate of change at play. While globalization has the potential to lead affluence and democracy through positive innovative business models and fair exchange, it can also lead to increased bias and mass exploitation. This duality, which comes with globalization, is a critical driver influencing actors in the system in various ways including the relationship and structures they operate under. Governments, businesses, consumers and the media were identified as four key actors influencing the system within the research boundaries.

Figure 1

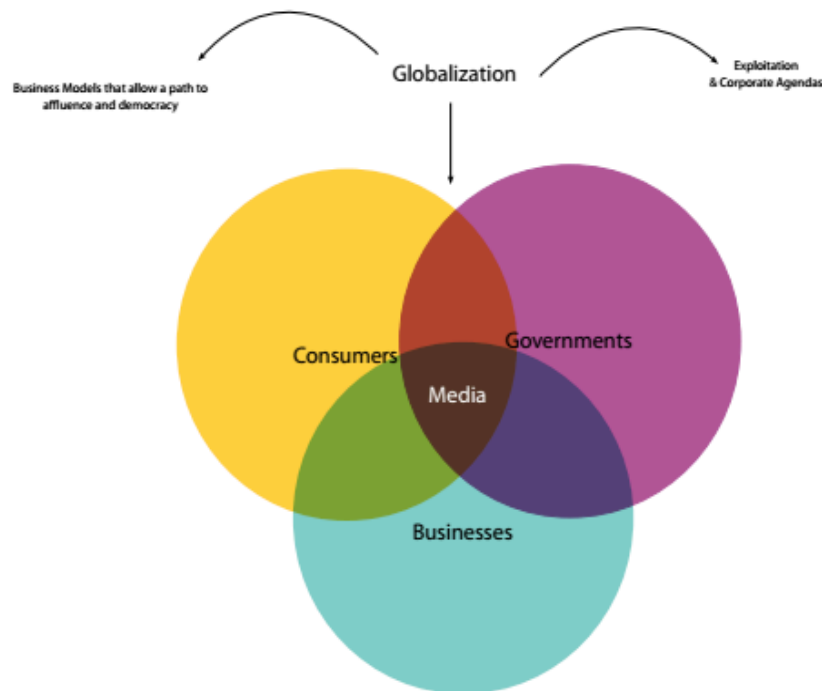


Figure 1 demonstrates how media plays a dynamic role between the three primary actors - consumers, governments and businesses - as information from each is exchanged through a secondary actor: the media. For our defining purposes, media is represented both in its traditional form such as print and television as well as in a more contemporary form, such as social media. This following sub-sections highlight the role of each of these key actors, beginning with the macro level of government, followed by the meso level of business and concluding with the micro level of consumers.

Macro: Canadian governments

Government by its very purpose defines the landscape of value and importance of MIC products through the implementation of policy and regulation. In addition, the Government of Canada also models the importance of the MIC value in their operations. In 2009 for instance, then-NDP MPP Peter Kormos discovered the provincial flags he had ordered through a government purchaser were made in China (Javed, 2013). This discovery eventually led to a decision that all ensigns purchased on behalf of the province must be 'made in Canada'. This is an example of the proliferation of outsourced products in contemporary Canada - even ones that we look and expect to be produced in Canada - and how the government holds regard and influence on the importance of MIC to be truly 'Canadian'.

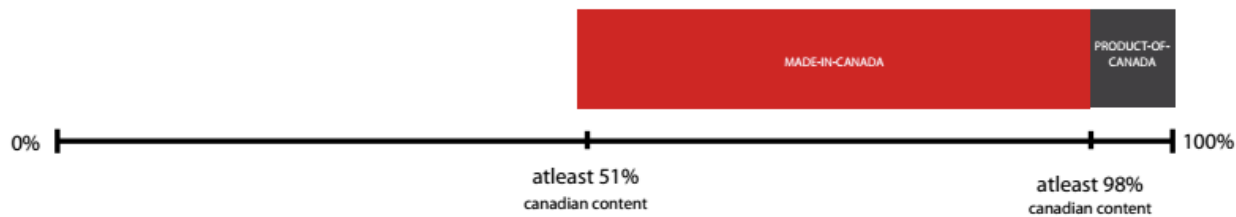
Policies developed and implemented over the past three decades, including NAFTA¹, the removal of tariffs from developing countries², as well as the WTO³, agreement have influenced a decrease in MIC garments and an increase in imports. As demand for ‘fast fashion’ has risen, this shift has been critical in increasing the global outsourcing of the garment industry at a better price point for businesses and consumers. Today, there are three federal statutes that aim to protect the integrity and awareness of locally made garments as well as other products (Statcan, 2009) found in Table 1.

Table 1

The Competition Act	Contains provisions against false or misleading representations
The Consumer Packaging And Labeling Act	Regulates accurate labelling information
Textile Labeling Act	Protect consumers against misrepresentation of textile fibre products

In comparison, the MIC regulations for food regulation are significantly less specific and focused than the garment industry. For instance, if MIC is printed on a food label, the claim must indicate specified details such as whether it was manufactured in Canada from imported ingredients or a combination of imported and domestic ingredients (Statcan, 2014). However, the rules and regulations are much more broadly articulated for the MIC garment industry. Garments fall under two generalized categories: a) Made-In-Canada, which must represents at least 51% Canadian content, and b) Product-of-Canada, which must represent at least 98% Canadian content. The distinction between ‘Made in Canada’ and ‘Product of Canada’ can often lead to confusion and misunderstanding for consumers, which will be discussed in more depth in the findings section of this paper.

Figure 2



¹ A Free trade deal between Canada, the U.S. and Mexico in 1984

² Canada removed all tariffs and quotas from 49 “least developed countries,” including Bangladesh in 2003

³ World Trade Organization agreement whereby Canada removed all quotas on textiles and apparel imports in 2005

Meso: Canadian businesses

After these policies were established and deregulated the industry, the garment industry experienced a surge of new apparel businesses emerge, benefiting their bottom line through international production. A notable example of this is Canadian company *Joe Fresh*, which is primarily produced in Bangladesh and claims to "offer affordable, of the moment style"(Joe Fresh, 2016). Table 2 profiles Joe Fresh and two other current Canadian companies who have developed their own distinct consumer value propositions through their products. *Roots Canada*, which manufactures in Canada as well as the US, South Asia and South America, identifies as a 'lifestyle brand' known for its quality (Roots,2016) and Canadian heritage. *Canada Goose* claims to keep its production at home in Canada and is known for its outstanding craftsmanship (Canada Goose, 2016).

Table 2

	Joe Fresh	Roots	Canada Goose
Made in..	Bangladesh	Canada, US, South Asia, South America	Produced at home in Canada
Value Proposition	Affordable, of the moment style	Lifestyle brand known for its quality	Outstanding craftsmanship

This example of the varied approach Canadian garment manufacturers demonstrates the scale of interest and ability to create MIC products. While MIC can be an important ingredient in the DNA of a Canadian-based company, other companies see their role as serving the needs of affordable and fast fashion, disregarding interest in any focus on MIC for consumer appeal.

Micro: Canadian consumers

The collapse of Rana Plaza in 2013 and ensuing labour scandal, put the unknown sweatshop in Bangladesh on a world stage of the often-exploitive labour of the international garment industry. A *BDC* (2013) study that surveyed over 1,000 Canadians following the unfortunate event in Bangladesh identified key trends that influence how consumers perceive value. Among the highlighted trends was the trend of "ethical consumption", with a reported 6 in 10 Canadians considering themselves ethical consumers (BDC, 2013). Many consumers reported be willing to pay a premium for products ethically sourced, in order to avoid harming people or the environment. With consumer access to online sources, the impact of awareness of events like the

Rana Plaza disaster are building awareness of consumer interest in investigating companies production ethics and also in reading the labels of the garments they are purchasing.

In tandem, a notable trend has emerged in the movement towards buying local. With 45% claiming they are making efforts to buy Canadian [BDC 2013], it would appear that Canadians are quite interested in sourcing local products, that align with their values. As the dissemination of information through media and labels highly influences consumers purchasing decisions, this research more closely examined how the MIC system supported consumers in making informed choices about buying local MIC garments.

Methodologies

An extensive literature review was conducted and a randomized sample was consulted for a MIC perception survey, engaging 66 participants for primary data collection. The information was analyzed, deconstructed and synthesized using influence mapping and archetype analysis methods.

To approach our system mapping, we utilized a number of different methodologies to unpack the MIC system. Below is an overview of the methods engaged in this research.

1. Influence Map: Mapped the stakeholders and their respective influences within the system to discover and visualize the connections between the various stakeholders, and identify sources and impacts of influence.

3. Causal Loops: Extracted behaviours of key stakeholders, for example, (a) dynamic relationships at play (e.g. cause-effect of increased deregulation ultimately resulting in decreased demand for MIC and the self-perpetuating cycle that has followed due to price), and, (b) patterns of behaviour, and activity.

4. Survey: Deployed a simple four question anonymous survey, shared through personal and professional networks, that received 66 voluntary respondents (see Appendix A).

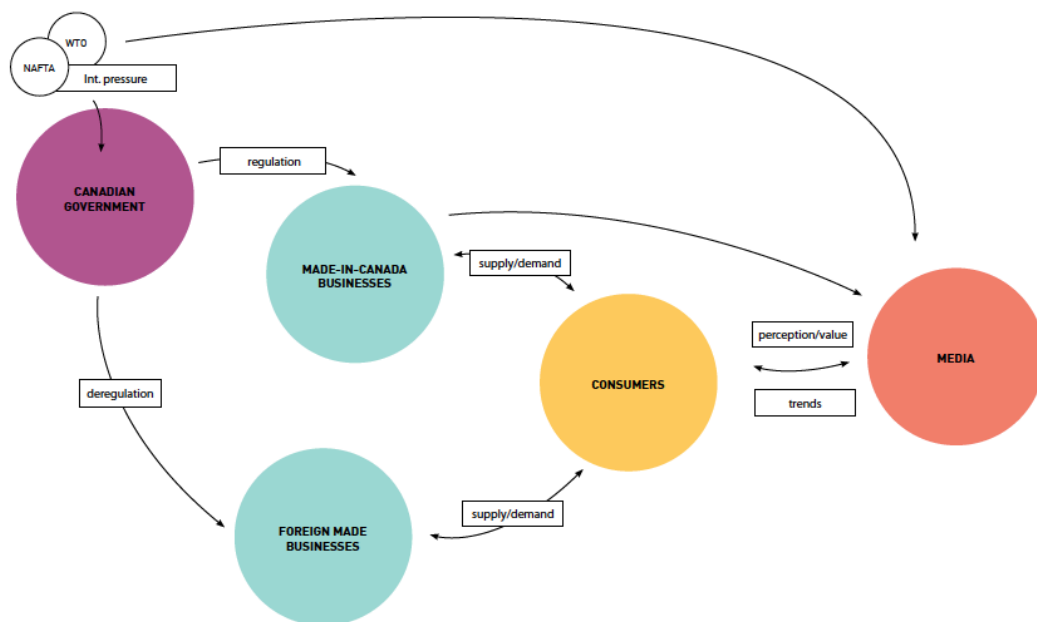
5. Archetype Analysis: Identified critical behavioural dynamics within the system, as well as potential interventions. 'Shifting the burden' and 'fixes that fail' appeared on a number of different occasions: a) on a macro level, policy scale where nations are trying to develop competitive economies and markets, b) on a meso scale, where companies are trying to maximize profits, and c) on a micro scale, with consumers try to maximize their purchasing power. The 'Limits to Growth' archetype emphasized limiting factors that were outside our scope of exploration, such as personal income and product costs.

Utilizing this mixed methodologies approach to deconstruct and examine the system proved invaluable. This approach enabled the team to look at expansive views of the system through the lens of each methodology, and created an engaging, iterative process, with each iteration richer than the last. The mix of methodologies ultimately resulted in a progressive expansion of our scope of understanding of the complexity.

Findings

Three findings were revealed through the research process: a) Globalization is a critical driver in the system as deregulation made it difficult for local manufacturers to stay competitive; b) Consumer perceptions of value are driving demand for cheap prices as they are limited by what they see in the market; c) The MIC system in the garment industry is a 'black box' for consumers who are challenged to make an informed choice. Figure 3 below is a visualization of the findings.

Figure 3



a) Globalization is a critical driver for the MIC system

Policies over the past three decades that have led to a decrease in the MIC garment industry and as a result, supported the increase in imports that stocks and supports the demand for 'fast fashion'. These policy changes have gradually supported those who chose to manufacture abroad and limit those who chose to stay local. As a result of imports dominating the local production scene, prices went down and it became more difficult for local manufacturers to stay cost competitive which created a reinforcing loop: the more imports we had through foreign manufacturers, the less it became feasible to keep manufacturing local.

Therefore, Canadian companies were increasingly cornered to make a choice: operate either from a place of values driven manufacturing or chase larger profit margins. This had huge implications not only for the sustainability of local made products but also the sustainability of local skills in making. Since the government recognizes two categories for locally made garments: a) Made-In-Canada

which much represent at least 51% Canadian content and b) Product-of-Canada which represents at least 98% Canadian content there is little incentive for companies to go beyond the bare minimum of 51%. This raises a critical question in approach: is it misleading that for a garment to have an MIC label to be only 51% made in Canada? The key insight here is that labeling regulations create “loopholes” in the system, which can potentially lead to misrepresentation and become a barrier for consumers to access their value proposition from the information provided.

b) Consumer perceptions of value are driving demand for cheap prices

Consumers are the most vulnerable and influential stakeholders in the MIC system. Many consumers make their choices based on a variety of factors including, but not limited to, price, quality and label. Thus, it comes with no surprises that most are very much aware of unsustainable and unethical practices; yet continue to participate in supporting these issues through their purchasing power. Consumers are vulnerable to the domination of fast fashion and cheap, low quality garments and also highly influential in that they hold the purchasing power. This was highlighted in the *BDC* study (2013), where despite an apparent movement towards buying local with 45% claiming they are making efforts to buy MIC, 66% claimed that the main factor behind their purchase intentions is lower cost. The key insight here is that what largely limits consumers is what they have available to them including a large clutter of fast, cheap fashion. This clutter of low-priced, of the moment fashion can be more appealing than trying to understand the current complexities of MIC garments revealing how large portions of the system is not seen.

c) The MIC system in the garment industry is a ‘black box’ for consumers

The influence of media on the MIC system span across three key inputs. These include marketing efforts by the businesses, traditional media reporting and social media created by consumers and businesses. These media sources’ coverage of the global garment industry has a unique ability to influence consumer decisions positively or negatively. With the labelling system providing consumers with a low or misunderstood level of information on MIC garments, consumers often source their information and views on the garment marketplace from media sources.

Responses from the survey conducted for this research revealed an information gap between consumers and industry regulations, despite the abundance of information and perspectives available through the government and through media sources. Despite access to these information sources, many consumers don’t know what they don’t know. For those with intentions to buy local, may actively read the label of the garment as MIC, and take this at face value, unlikely to look more deeply into the definition of this claim before making a purchasing decision. The key insight here is that in order for consumers to be able to make a more informed choice about their purchasing decisions, they need to be provided with a holistic perspective and more thorough definition of the MIC system.

Interventions

As with any complex system that has multiple stakeholders, there is an opportunity to examine systemic engagement and interventions from each stakeholder’s perspective. It could be argued

that a robust systemic analysis could be undertaken by the Government of Canada to evaluate levers of change and points for interventions from all facets of the system. Due to the necessary scope limitations for this project, a policy-centric focus was taken for the recommendations of interventions.

Integrate Transparency

We identified a need to integrate transparency and build integrity into the MIC system.

When the minimum requirement to be MIC is 51% and 'Product of Canada' is 98%, there is little motivation for companies to do more than the bare minimum, particularly when consumers are themselves not very familiar with the meaning of the terms. In our survey (see Appendix A), when asked 'What is most Canadian- Designed in Canada, MIC, or Product of Canada (POC)?', almost 68% of participants identified POC as their response. A challenge to perception was identified in 63% of respondents that thought a product should get the MIC label if it has 76% or more Canadian content, which is far more than the minimum 51% that is required by our regulations.

While this is drawing from a small subset of participants, the responses reflect a information gap, or black box, between the consumers and industry regulations, despite an increasingly information-accessible consumer base. How do consumers know how to define the difference of MIC and POC when reading the labels with no further information available in the moment? Does the onus fall upon the customer to self-educate by researching the various labeling categories? Referring to the research question, "How can the system support consumers in making an informed choice?" and viewing it from the government's perspective, we explored the introduction of new labeling regulation. The regulation would apply to all manufacturers (domestic and foreign) selling clothing in Canada, and require them to tweak the current clothing labels to state the percentage of Canadian content in each garment, building in a level of accountability and transparency from the companies, making what is implied and known but currently near invisible, visible to the consumer.

In this proposed intervention, a consumer might see the following when they pick up a jacket in the store – the specified amount of the product that was made in Canada, even when it was 100% imported.

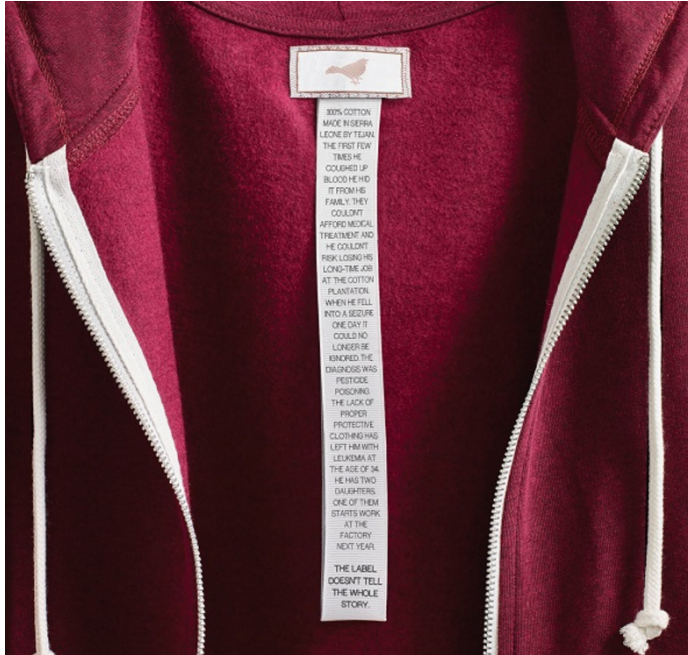
Made in China
0% Made in Canada

The proposed revised labeling system would work to reinforce a trust and integrity by the consumer of the MIC system, as they more regularly interact with the information while shopping, and in the long-term support the creation of a strong capability to deliver on the interests of the consumer in their purchasing power.

Made in China
70% Made in Canada

This proposal was inspired by the "The Label Doesn't Tell the Whole Story" campaign by the *Canadian Fair Trade Network* and *ReThink Communications*, who created a series of photographed clothing labels aimed to raise awareness of the horrific working conditions of many

foreign made garments.



As stated on the *Canadian Fair Trade Network* website, the hope for the campaign was to make people think about the garments and where they have come from (Canadian Fair Trade Network, 2015).

Recognizing and utilizing the power of the label is not an unusual practice in the international marketplace. The Italian government, for example, pushed for the creation of a “100% Made in Italy” campaign, as it considered its country of origin brand a ‘national economic resource’ (Harnett, 2014). The Italian government viewed its motion as taking action to protect the national brand from the diluted use of ‘Made in Italy’ label that it deems can be deceptive to consumers, who associate

the brand with high quality, and as having a domestic supply chain, both of which may not be true (Made in Italy, 2016).

The underlying principle of communicating authenticity to consumers is triggering a paradigm shift in the consumer’s knowledge base. By enabling Canadian content to be more accurately communicated to consumers, the MIC system can evolve and potentially gain recognition and demand. It is important to note that this recommendation by itself is not a systemic intervention, but rather, works to drive a shift in consumer perception, which is a necessary first step.

Build Incentives, Capacity & Awareness

When looking at the system temporally, the MIC industry of 2016 is vastly different from that of the system in the 1970’s, and 1980’s (pre NAFTA) or 2002 (pre-WTO agreements) – it used to be far larger, and more self-reliant. With its current smaller size and more international dependencies a critical next step, as proposed by the team, would be to build in capacity, incentives and awareness in the end users: the consumers. Consumer perception and mind shifts are critical given their innate power to drive the conversation and financial impacts on the MIC garment industry. One proposed way to build the capacity, incentives and awareness, would be for the Canadian government to:

- Leverage the media to promote the Canadian MIC industry, and help inform consumers about the labels and their meaning and significance, demystifying the labels themselves.
- Increase support for Fair trade organizations and individual activists that play a critical role in using traditional media and social media channels to educate consumers about the industry, the available choices and their implications and impacts.

The increased media support is particularly important for the Canadian subject matter expert's in the industry, 30% of which do not has an online platform (BDC, 2013) and thus experience a very difficult and constrained capacity to reach consumers in a time where online research/shopping is a growing trend.

We trust that following action by the government, large Canadian garment companies selling clothes nationally will be incentivized to use their internal PR and marketing resources to leverage the media to promote the percentage of Canadian content of their garments as a positive public relations campaign. As new messaging infiltrates the media, consumer's perceptions and ultimately their shopping decisions will be made more effectively and likely more closely to their motivations and interests to purchase MIC products.. As supported by our survey (see Appendix A), over 60% said that seeing a MIC or POC label does impact purchasing decision, with the assumption being that they understand the difference between the two, and, on a larger note, stand behind the price differential when comparing to a cheaper foreign made competitor, with an assumption that the product is also produced more ethically and sustainably (Vennavally-Rao, 2013). The consumer would have a more informed capacity to engage with the system.

Leverage Growth

Finally, it is only after a complex system finds it footing and then stabilizes itself over a period of time, that it can realistically invest in stable growth and expansion and, ultimately, be more sustainable. To this we propose the MIC garment sector to partner with other cutting edge industries such as textiles and technology, both of which are striving to innovate and seamlessly integrate with other products/services as a growth strategy (Trichur, 2011). The media as a key player and stakeholder in the system (comprising traditional media channels such as the newspaper, as well as social media) can be leveraged as a medium to help promote, and find new potential partnerships, however unlikely they may be, such as other sectors like healthcare. This could have the ability to secure new pockets of individual and institutional consumers, who are seeking garments with augmented features, made in Canada. Such partnerships would help play a part in the industry expanding its base, while building sustainability and resiliency into its enhanced MIC model.

Areas of Further Exploration

The following is to highlight how no matter where the intervention originates or whichever player with most influence (given the interventions) starts the interventions, all major groups have to interact and engage with each other for a systemic change.

There are many areas complex areas of further exploration, some of which include:

1. **Stakeholders beyond the boundaries of this research:** Levels of change and points of intervention of other stakeholders, and the potential 'politics' each may have in their perspective and position on MIC products.

2. **Economics of MIC in Canada:** Deeper exploration on the economic value and domestic industry implications of the MIC system, as well as the more intangible cultural and social significance of MIC.
3. **International Impacts:** Side-effects of the proposed interventions on the international stakeholders were outside of the boundaries of this research, such as foreign economies/labourers/cost flows. If we are to consider the perspective of the general 'conscious consumer,' ethics in this area would also be relevant, as a shifting the burden archetype could occur. This could be potentially observed if a decrease of Canadian imports from another market negatively impacted the economy or quality of life in a foreign country, making the effects a consideration for socially conscious consumers, but outside of the scope for this research.
4. **Influencing International Standards:** This insight also brings to light opportunities for larger scale policy interventions - such as opportunities to create regulations for the global market, such as an international minimum standard for labour conditions, and accountability standards for corporations, including private companies, operating in these jurisdictions. It would be critical to explore how accountability mechanisms could be implemented and monitored, and which stakeholders would be involved.

Conclusion

As identified in this paper, the Made-In-Canada garment industry, which is just a subset of the larger garment industry, is incredibly complex. In order for consumers to be able to make more informed choices about their everyday purchasing decisions, they need to gain a more holistic perspective of the MIC system. Yet, consumers are largely limited by what they see available to them and by the clutter of fast and cheap fashion which often comes at an ethical cost with exploitative international garment industry practices. The garment industry and MIC system remains to be a 'black box' of consumer awareness and understanding of product labelling. Furthermore, loosely defined labeling regulations lead to misrepresentation and become a barrier for accessing accurate information such as that a garment with an MIC label needs to only include at least 51% Canadian content. When the minimum requirement to have an MIC label on a garment is 51%, there is little motivation for companies to do more than the bare minimum to be considered 'local' especially after many policies made it cheaper and easier to manufacture abroad. It is important to keep in mind there can be countless combinations with which a complex system like the MIC garment industry can be improved. For purposes of scope, this research looked at the themes of integrating transparency and integrity into the MIC garment industry as a priority intervention for building its capabilities, and supporting its growth and success as a major Canadian industry, from the perspective of the government as the main initiator.

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Appendix

A. Survey

QUESTIONS


RESPONSES

66

Hi, shop for clothes lately?

We'd love 3 minutes of your time for a little 4 question survey!

Image title



What do you think is more Canadian?

- ☐ Designed in Canada
- ☐ Made-in-Canda
- ☐ Product-of-Canada

...

What minimum threshold of Canadian content do you think qualifies for a "Made-in-Canada" label on that shirt of yours?

- ☐ 51%
- ☐ 76%
- ☐ 98%
- ☐ 100%

Does seeing the label "Made-in-Canada" or "Product-of-Canada" impact your purchasing decision?

- ☐ Yes
- ☐ No

...

What is the most important factor impacting your clothing purchase decisions?

- ☐ Price
- ☐ Quality
- ☐ Brand
- ☐ Locally made