

Primark's journey towards circularity

EPA Circular Economy Conference

24 September 2025

PRIMARK



PRIMARK IN NUMBERS

Countries



17

Stores



466

Colleagues



80,000+



Of all our clothing is now circular by design (including 11% of all tees)

3%

Of the cotton clothing units sold at Primark contained cotton that was organic, recycled or from the Primark Cotton Project

57%

Of our clothing unit sales contain recycled or more sustainably sourced materials

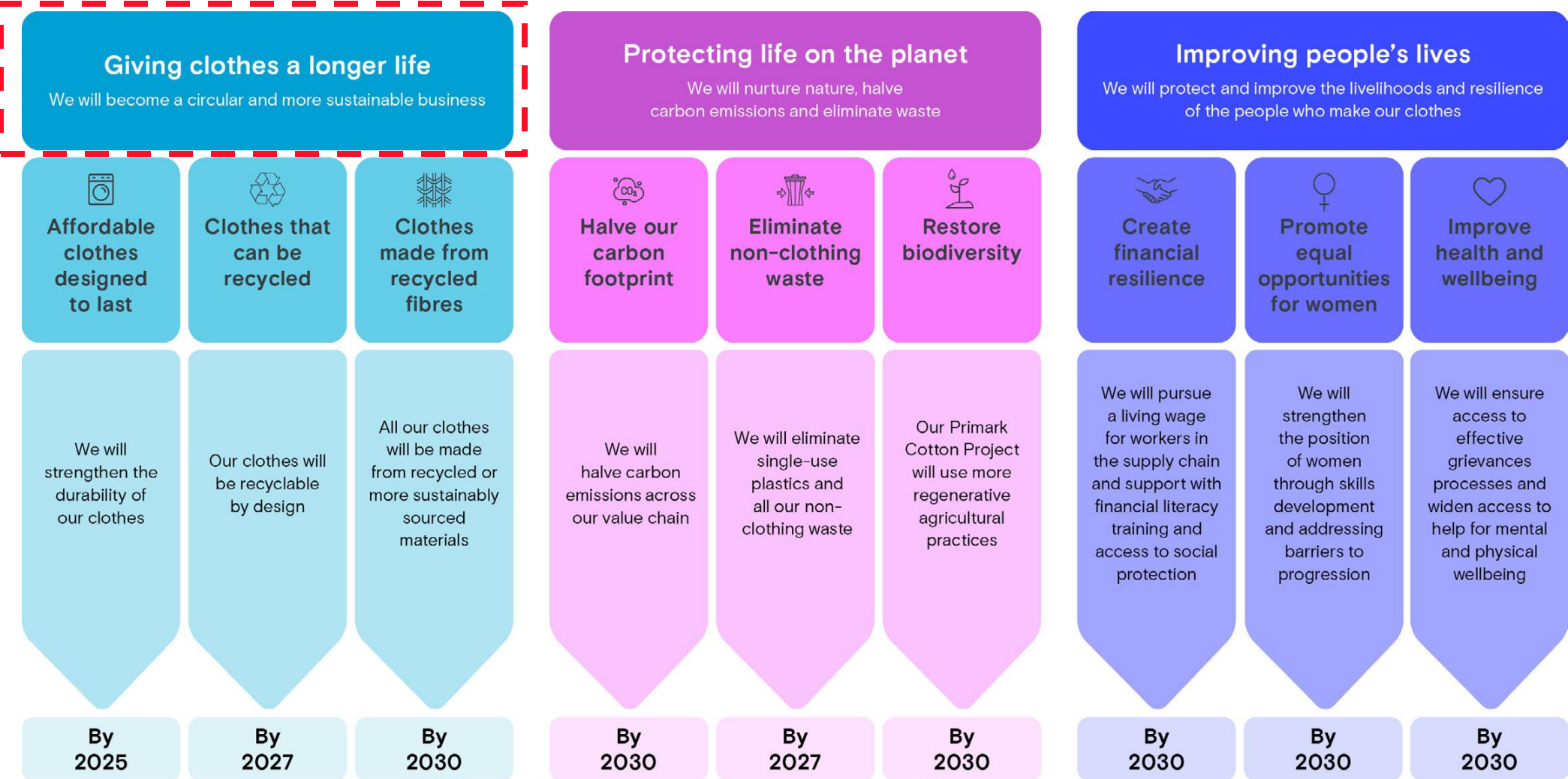
66%

Sq. metres of selling space



18.8M+

OUR PRIMARK CARES STRATEGY



Enabled by:
Human rights approach | Partnerships & Collaboration | Traceability & Transparency

**The landscape is
changing...**



WE'RE ALL NAVIGATING A VERY DIFFERENT CONTEXT



Wave of regulation

The textiles industry faced a wave of new legislation in recently and we are making our utmost to implement the highest standards.

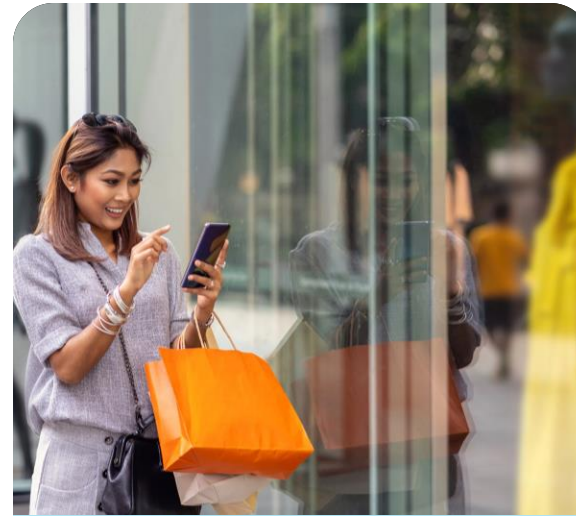
But we need time to adapt to the most significant changes for the industry in decades.



Level playing field

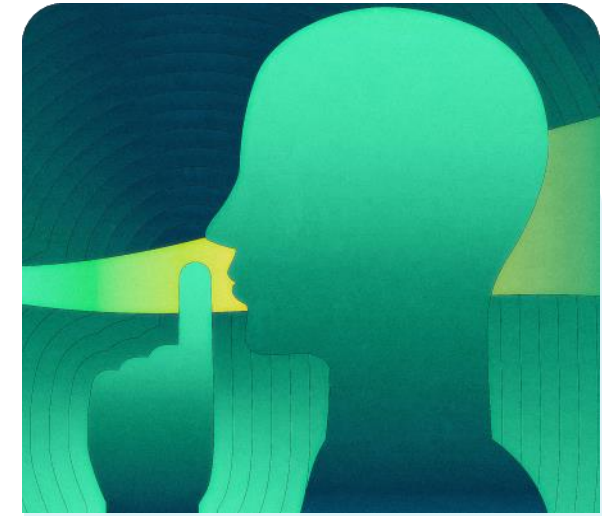
Fast-to-market has become all about volume but not everyone plays by the same rules.

We need to all operate by the same standard and regulators need to ensure a level playing field in Europe.



The Say-Do Gap

There's a widening gap between customer attitudes and customer behaviour – known as the say-do gap driven by the rise of ultra-fast fashion.



Greenwashing has become 'greenhushing'

With the threat of financial penalties, brands are struggling to find their space and voice.

The rules need to be clear and coherent.

**ESG LEGISLATION IS IMPACTING
THE COST OF DOING BUSINESS
IN FASHION AND IS DRIVING
CHANGE**

400

- Pieces of legislation in 18 months

150

- Sustainability Focussed

58 EPR compliance
schemes

300 Report submissions
p.a.

16 Operating markets

HOW WE DEFINE CIRCULARITY

“Circular fashion is an ecosystem – but our starting point is designing and creating our clothes with the **future in mind**, so that they can be **worn time and time again**, then given a **new life** once our customers are finished with them.”

The Circular Ecosystem



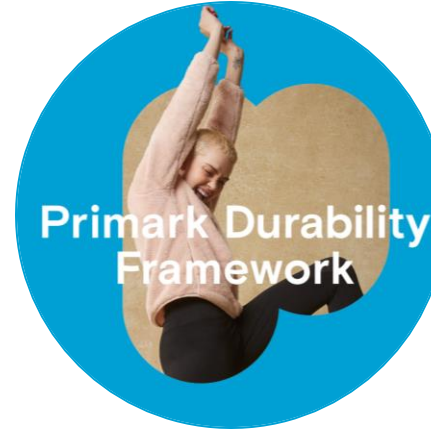
THE CIRCULAR ECOSYSTEM IN PRACTICE AT PRIMARK



Circular product design



Recycled materials



Durability



Repair



Textile takeback



Industry partnerships



Circular business models



Innovation & investment

WE CREATED A NEW STANDARD FOR CIRCULARITY

In 2023, we **launched our Circular Product Standard (CPS) and Circular Design training programme in partnership with Circular Textiles Foundation.**

To date, we've **trained over 500 of our colleagues** in circular by design principles creating new skills.

Last year, we **launched our first circular design collection.**

3% of all our clothing is now circular by design (including 11% of all T-shirts).



CIRCULAR AND MORE INCLUSIVE COLLECTIONS AT SCALE

3% of all our clothing is now circular by design (including 11% of all t-shirts)



Rita Ora

AW23



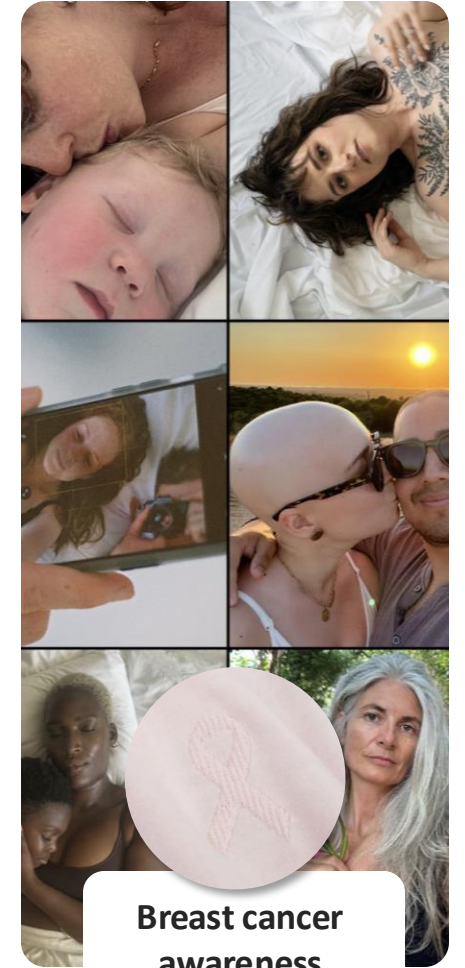
LOVE
THEIR
CLOTHES
FOR
LONGER



PRIMARK®
Adaptive



Award-winning!
Global License Awards
Best Sustainability
Campaign



Breast cancer
awareness
campaign

EMBEDDING MORE SUSTAINABLE MATERIALS AT SCALE

66% of clothing units contains recycled or more sustainably sourced materials

**Scaled our partnership with Recover™
Recycled cotton and continue to accelerate fibre partnerships**

**57% of cotton clothing units sold contained cotton that was organic,
recycled or from the Primark Cotton Project**



CLOTHING IS ONLY WASTE WHEN IT'S WASTED

What's next on the journey...



**Continued
upskilling of our
People and
suppliers**



**Next Generation
Materials and
Fibres**



**Enhanced Textile
Collection Sorting
& Recycling**



**Industry
Collaboration**

Thank you