



Briefing for Business Leaders

Mapping the Repair Landscape in Fashion

Why It Matters for Value, Risk, and Circular Growth

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Executive Introduction

Fashion is facing rising commercial pressure, tightening regulation, and growing customer frustration with fragility and waste. The traditional linear model of make ▶ sell ▶ waste ▶ replace is no longer delivering resilience or relevance.

Repair is emerging as a strategic lever in response. What was once an after-sales cost centre is becoming a driver of customer lifetime value, brand trust, and revenue. Yet most businesses still lack a clear understanding of how to make repair commercially viable and operationally scalable.

This briefing summarises new research that maps the repair landscape and identifies six distinct business models, along with the operational, human, and strategic enablers required for success. It is designed to help senior leaders understand:

- where value is created,
- which repair model fits their organisation,
- how to overcome capability barriers,
- and what actions are needed now to build competitive advantage.

FINDING 1

Repair is becoming a competitive differentiator as expectations shift toward durability, fairness, and longevity.

1. Why Repair Matters Now

Repair is shifting from a peripheral service to a core strategic capability. Three forces are converging:

1.1 Customers are losing patience with fragility and waste

While most customers don't actively seek repairs today, dissatisfaction is accelerating. High costs, short product lives, and inaccessible repair options are undermining trust and prompting brand switching.

1.2 Regulatory and cultural momentum is strengthening

Right-to-repair regulation is expanding across the UK, EU, and globally. Even partial frameworks signal a clear direction of travel: products must be more repairable, data more accessible, and waste significantly reduced.

1.3 Repair supports margins in a maturing, squeezed market

Life-extension services create new value streams: maintenance subscriptions, diagnostics, trade-in, refurbishment resale, and enhanced durability positioning. Brands with repair capability already benefit from diversified revenue and smoother customer retention curves.

2. The Six Repair Operating Models

The study identifies six operating models that have started to appear in the industry. Most organisations will benefit from a hybrid portfolio rather than a single approach.

Model 1 – Brand-Led In-House Repair Services

Repairs are performed directly by the brand's own technicians or dedicated repair hubs.



Best for: Premium brands prioritising service quality and control.



Value: Builds customer trust, captures high-quality durability data, increases lifetime value.



Risks: High fixed costs; requires specialist labour and facilities.

Model 2 – Distributed Expertise Repair

Repairs are carried out by networks of independent local repairers, coordinated by a central connector organisation.



Best for: Brands with extensive retail footprints and high in-store traffic.



Value: Drives store visits, boosts attachment rates, improves in-store experience.



Risks: Limited space in retail locations; repair quality may vary.

Model 3 – Approved Partner Collaboration

Repairs are outsourced to centralised third-party facilities, with the brand managing collection and return processes.



Best for: Brands seeking nationwide reach without building in-house capacity.



Value: Flexible, scalable operations; rapid expansion possible.



Risks: Requires oversight; repair quality can vary; limited direct data on products.

Model 4 – Independent Third-Party Repair

Repairs occur entirely outside of the brand's control, with independent service providers handling all work.



Best for: Mass-market or lower-priced brands; markets where repair is demand-driven.



Value: Extends product life with minimal brand investment.



Risks: No control over repair quality; potential reputational impact if repairs fail.

Model 5 – Combined Repair & Refurbish Operations

Centralised facilities handle both repair and refurbishment, including recommerce preparation and warranty resolution.



Best for: Brands pursuing recommerce, handling high returns volumes, or seeking operational efficiency.



Value: Generates resale margins, reduces waste, streamlines operations.



Risks: Requires significant capital investment and logistics management.

Model 6 – Customer-Enabled Repair

Brands provide tools, parts, and instructions so customers can repair items themselves.



Best for: Brands with modular products or sustainability-focused strategies.



Value: Reduces service costs, extends product life, strengthens community goodwill.



Risks: Liability concerns; dependent on product design and customer capability.

3. What the Research Shows

3.1 Multi-stream service ecosystems outperform single-stream repair

Leading brands combine repair with diagnostics, maintenance, trade-in, warranties, and recommerce.

FINDING 2

Repair delivers its highest return when treated as a lifecycle platform, not a standalone service.

3.2 Lifetime value gains exceed revenue from repair transactions

The biggest commercial returns come from:

- improved retention and repurchase,
- increased parts and accessory sales,
- higher conversion into refurbishment channels,
- stronger customer trust and improved customer retention.

Focusing solely on the cost of individual repairs leads companies to chronically under-invest in repair capabilities.

3.3 Data is the most under-used enabler

A profitable repair ecosystem requires visibility over:

- failure modes,
- product histories,
- diagnostics and error codes,
- intervention outcomes.

Today, this data is fragmented, slowing cost reduction and scale.

FINDING 3

Better data circulation is essential to reduce the overall cost of providing repair services to customers.

3.4 Repairability must start in product design

Product portfolios often embed constraints, such as sealed units, glued panels, and proprietary fasteners, that inflate time and parts cost. Businesses embracing “design for repair” demonstrate:

- reduced warranty exposure,
- faster turnarounds,
- lower refurbishment cost,
- stronger durability narratives.

4. What Is Holding Businesses Back?

Despite clear value, repair is commercially underdeveloped because it challenges entrenched linear logics.

Businesses lack clarity on:

- which model fits their product and customer profile,
- how to measure commercial value beyond short-term profit,
- how to build scalable labour and training infrastructure,
- how to integrate repair with design, supply chain, and retail,
- how to combine models into a coherent portfolio.

And critically:

FINDING 4

Skills shortages in areas such as sewing, garment construction, diagnostics, leatherwork, and craft are systematically limiting scale and quality.

5. What Should Businesses Do Now?

5.1 Build repair capability as a strategic competence

This includes:

- professionalising training and certification,
- treating technicians as a high-value workforce,
- investing in diagnostics, tools, and modular parts systems.

5.2 Form partnerships

No single actor can meet market demand alone. Opportunity lies in collaborating with:

- independents,
- logistics partners,
- refurbishment specialists,
- community repair initiatives.

This blended ecosystem model is already gaining traction in cities such as London.

5.3 Prioritise high-value, high-failure-rate categories

Returns are strongest where:

- failure modes are predictable,
- parts availability is manageable,
- repair meaningfully extends life,
- recommerce channels exist.

5.4 Use transparency as a trust driver

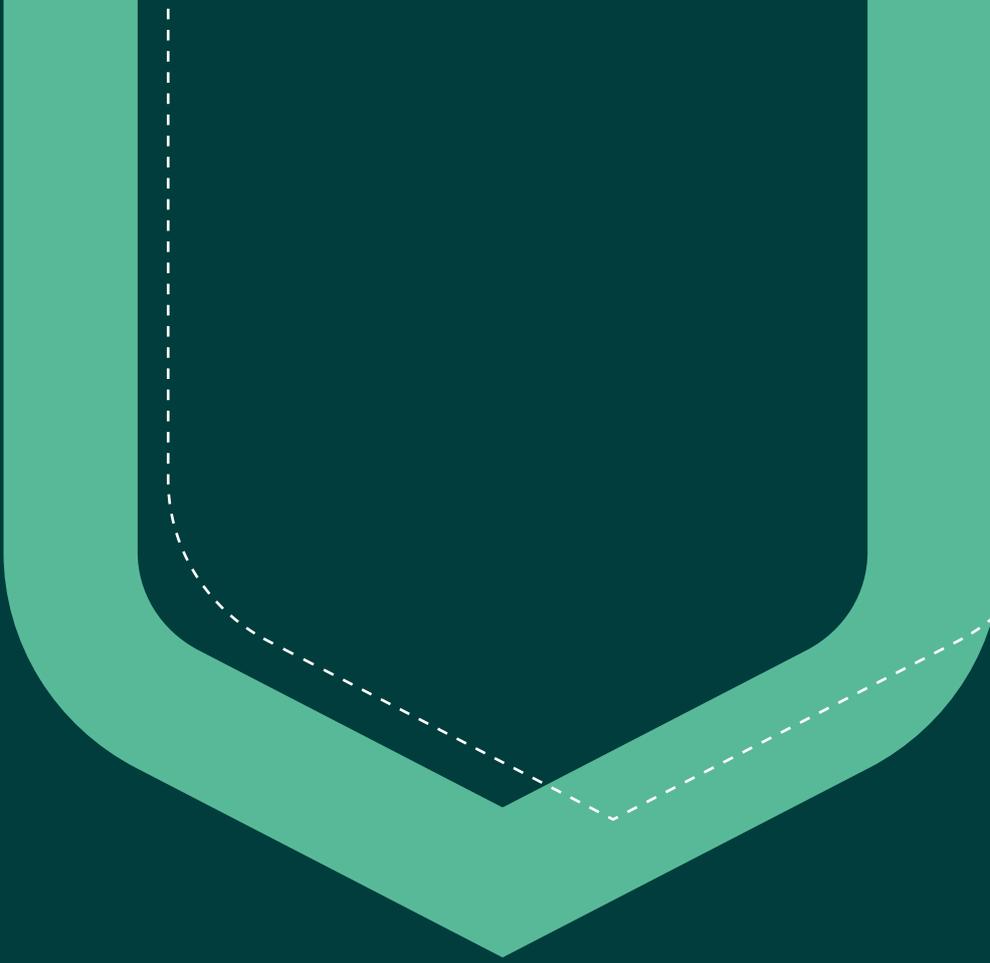
Clear repairability scores, lifespan expectations, parts availability, and honest durability claims reshape customer expectations and build confidence.

6. Summary for Business

Repair is not just a compliance obligation. It is a strategic value engine that strengthens customer relationships, improves product quality, and unlocks circular revenue.

To capture this value, organisations must shift from reactive after-sales to integrated lifecycle management, where design, data, skills, and partnerships work together to deliver a differentiated, durable, and profitable customer experience.

Repair is not only compatible with profitability – it is becoming essential to long-term brand relevance and competitive advantage.



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