

EPR in Textiles from Design to Ending Waste

22nd October
ICI Green Agenda Talks



THE EUROPEAN APPAREL
AND TEXTILE CONFEDERATION





115
billion EUR
T&C EU imports

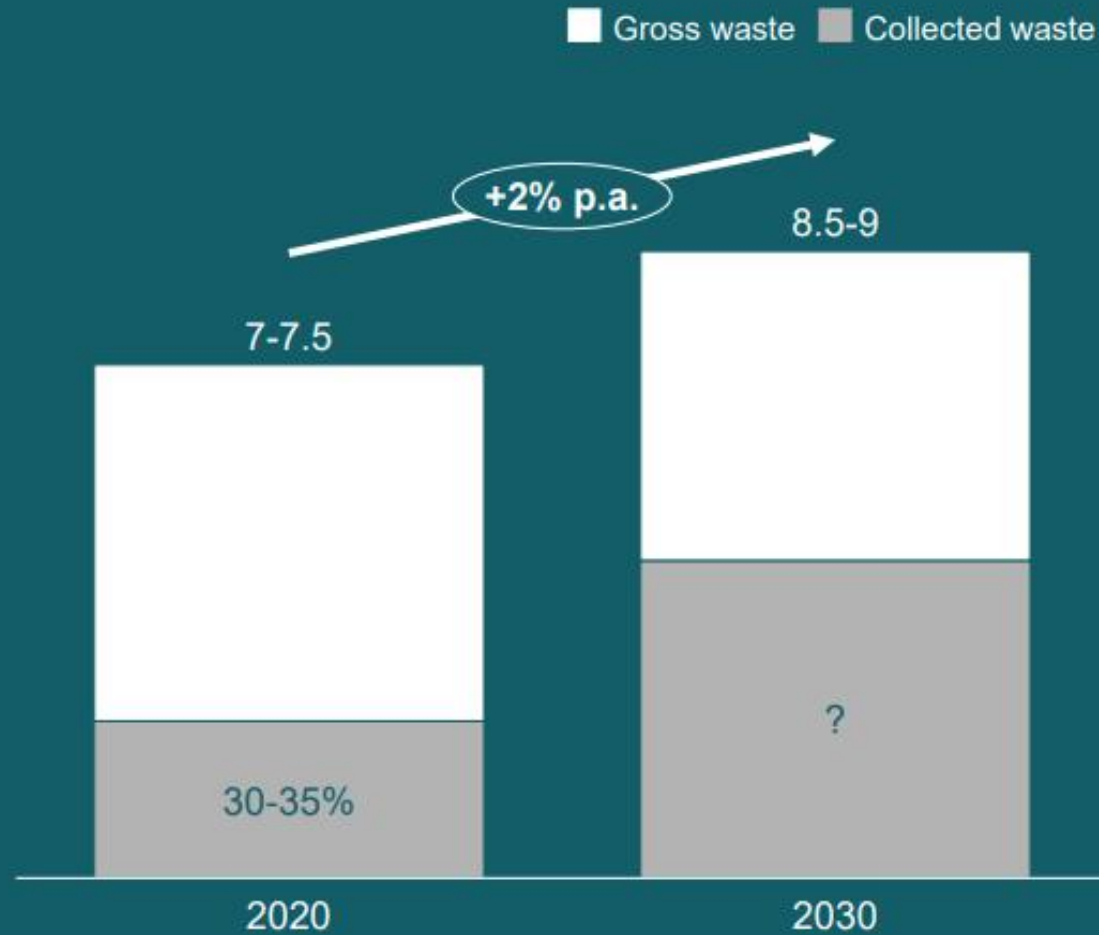


EURATEX has 4 members from Turkey:



Europe has a 7-7.5 million tons textile waste problem, of which only 30-35% is collected today

EU-27 and Switzerland textile waste volume, million ton



Sources: European Commission Joint Research Centre (JRC), 2021; Intecus, Germany report, 2020; ReFashion, France report, 2020; Rebel, Netherlands report, 2021; Umweltbundesamt, Austria report, 2022; Higher Institute for Environmental Protection and Research Italy report #1 and #2, 2021; Modare, Spain country report, 2021; Nordic Council for Ministers Baltic Countries report, 2020; Ellen MacArthur Foundation; Le Figaro, 2019; Deloitte European Market Study for ETSA, 2014; JRC Technical report, 2021; Humana Annual Report, 2020; Eurostat Prodcom; expert interviews



This new circular value chain would require significant capacity with 150-250 facilities

Overview of required capacity¹ in EU-27 and Switzerland, 2030

THIS IS A SCENARIO AND NOT A FORECAST

ILLUSTRATIVE LOCATIONS

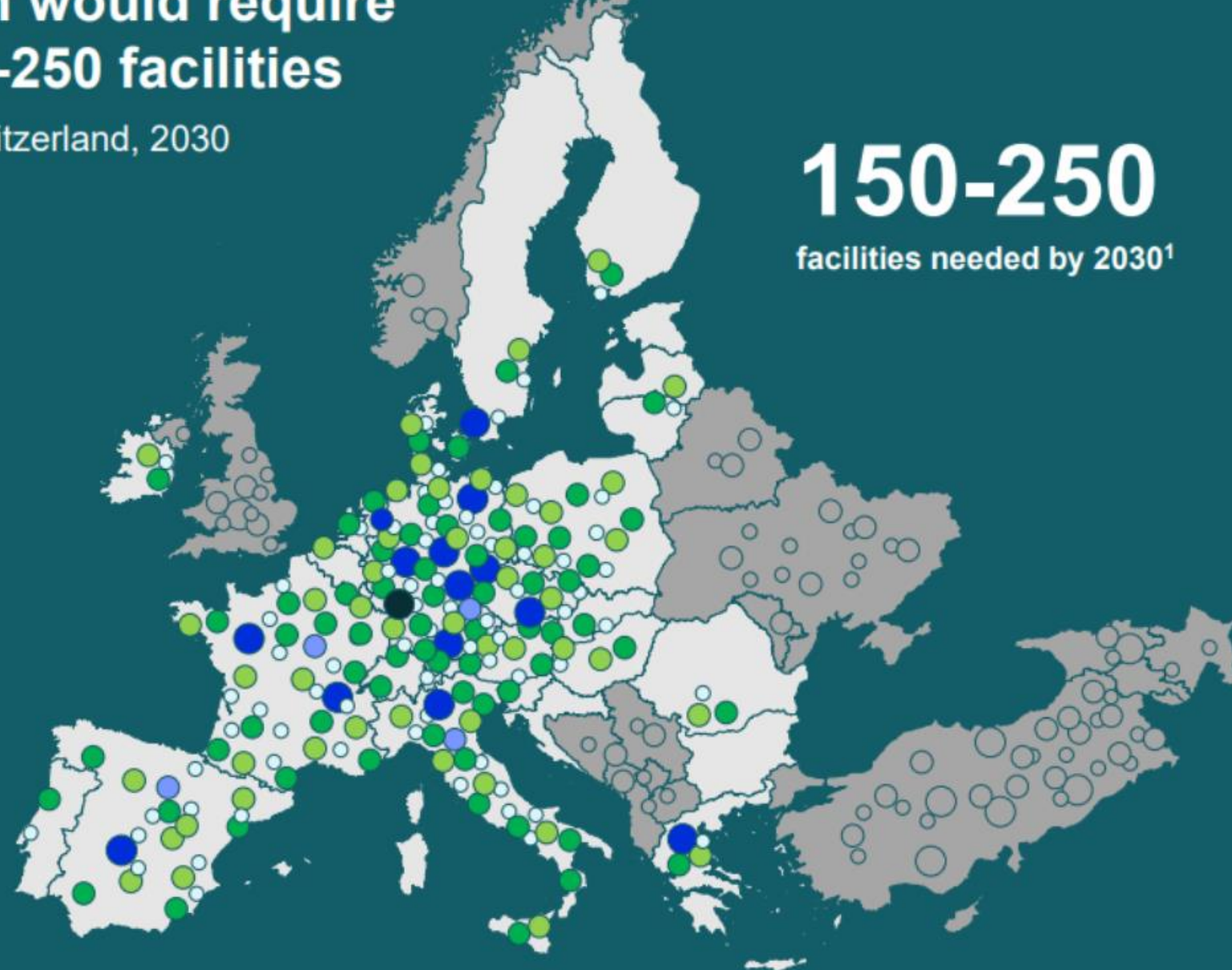
150-250

facilities needed by 2030¹

- Sorting for re-use
- Sorting for recycling
- Mechanical recycling
- Thermo-mechanical
- Chemical recycling
- Thermo-chemical
- Illustrative facilities outside EU-27 and Switzerland

Scale, tons

- 25 000
- 50 000
- 100 000



¹ The project overview reflects the estimated amounts of facilities required in base case scenario where EU-27 and Switzerland reach a 50 percent collection rate and a upside scenario where 80 percent collection is reached; standardized non-integrated facilities are assumed for simplicity; Average plant sizes differ for the technologies. The assumed scales (in Kt/year) are: Sorting (reuse) 50,000; Sorting (recycling) 50,000; Open-loop 25,000; Closed-loop traditional 25,000; Closed-loop soft 25,000; Thermo-mechanical 50,000; Chemical - cellulosic 100,000; Solvent-based 100,000; Chemical - Polyester 100,000; Thermo-chemical 100,000; For some of the value chain steps (sorting for re-use, open-loop mechanical, and closed-loop traditional mechanical) there exists some share of needed capacity already today.

Circular Textile Business Case



Source: McKinsey & Company, July 2022

Ecodesign in the EU

- Garments sold in the EU as of (?) 2028 to comply with minimum requirements
- Defines criteria, EPR Eco-modulation
- **Fiber-to-fiber recycled contents** is a possible requirement

GET READY FOR
THE NEXT
STEP



EcoDesign enters into force on **18 JULY 2024**

EU waste legislation

EPR in the proposal

- **Mandatory** national Extended Producer Responsibility for textiles
- **Minimum harmonization:** scope, fee modulation, PROs
- Organize textile **waste collection and treatment**
- **Finance** R&D and preparation for textile-to-textile recycling



harmonisation across Member States



Supporting the industry's circular transition



Alignment with ESPR



No free riders



Harmonised end-of-waste criteria



Key demands



Legal negotiations from November
Adoption 2025 (tbc)
EPR schemes in place 2026/ 27 (tbc).

Industry demands

- **EPR harmonisation** key for circularity, level playing field, reducing burdens. (e.g. scope, timeline, PRO governance, roles and responsibilities etc. operational aspects (e.g. registration form, fee structure, etc.)
- **Micro enterprises** in the scope, with simplifications
- Effective **market surveillance** to avoid free riders. Online platforms jointly and severally liable with their suppliers
- Exclude **PPE, carpets and mattresses**, need separate EPR schemes
- recycling **targets** after assessing waste volumes and recycling capacities
- EPR **funds** to support developing the recycling value chain in Europe
- sufficient **time** to set EPR legal and operationally

Harmonisation

3 layers of harmonisation

Layer 1:

EU law: Waste Framework Directive
2024 – 2026/7

Layer 2:

National law: EPRs scheme

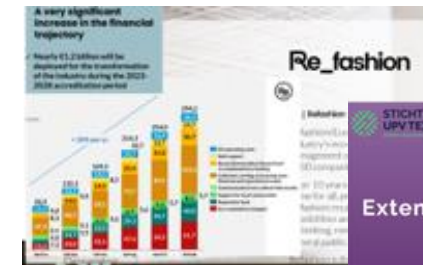
Layer 3:

National private: PROs

adoption late 2024

3 legally
established
EPRs in 2024

15 - 20 PRO initiatives in
2024



Extended Producer Responsibility for
Textiles





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