

ROADMAP

Roadmaps aim to inform citizens and stakeholders about the Commission's work in order to allow them to provide feedback and to participate effectively in future consultation activities. Citizens and stakeholders are in particular invited to provide views on the Commission's understanding of the problem and possible solutions and to make available any relevant information that they may have.

TITLE OF THE INITIATIVE	EU strategy for textiles
LEAD DG – RESPONSIBLE UNIT	DG ENV B1 Sustainable Production, Products and Consumption DG GROW F4 Tourism, Textiles and Creative Industries
LIKELY TYPE OF INITIATIVE	Communication
INDICATIVE PLANNING	Q3 2021
ADDITIONAL INFORMATION	-

This Roadmap is provided for information purposes only and its content might change. It does not prejudice the final decision of the Commission on whether this initiative will be pursued or on its final content. All elements of the initiative described by the Roadmap, including its timing, are subject to change.

A. Context, Problem definition and Subsidiarity Check

Context

The European Green Deal¹, the Circular Economy Action Plan² (CEAP) and the Industrial Strategy³ identified textiles as a priority sector in which the EU can pave the way towards a carbon neutral, circular economy, and announced an EU Strategy on textiles. In the Commission Staff Working Document 'Identifying Europe's recovery needs', which accompanied the Communication 'Europe's moment: Repair and Prepare for the Next Generation'⁴, the Commission outlined the impact of the COVID-19 pandemic on the industrial ecosystem for textiles in the EU, identifying its recovery needs in the light of current and expected weaknesses on both the demand and supply sides.

Problem the initiative aims to tackle

Textiles and clothing make up a diverse industrial ecosystem covering different value chains and types of products. The industry employs 1.5 million people, spread across more than 160.000 companies in the EU, most of which are SMEs, with an EU annual turnover of EUR 162 billion in 2019⁵. Despite a growing social trend for sustainability in the EU textile and fashion industry⁶, Europeans consume on average 26 kg of textiles per person per year - a significant share of these coming from third countries. Each item is used for a shorter period, resulting in 11 kg of textiles discarded per person per year⁷ (what is known as the so-called 'fast-fashion' phenomenon).

Whereas the EU textile industry is globally competitive, especially in the areas of technical textiles and high-end fashion clothing, the ecosystem is suffering significantly as a result of the COVID-19 crisis, both in terms of disrupted supply and drop in consumer demand. The crisis has also affected international trade in second hand textile products and disrupted waste streams.

The textile sector is a resource-intensive sector with important climate and environmental impacts. Textile consumption is the fourth highest pressure category in the EU in terms of use of primary raw materials and water (after food, housing and transport), and fifth for GHG emissions (EEA). Most of the pressure and impact linked to clothing, footwear and household textiles in Europe occur in other regions of the world, where the

¹ COM (2019) 640

² COM (2020) 98

³ COM (2020) 102

⁴ https://ec.europa.eu/commission/presscorner/detail/en/ip_20_940

⁵ <https://euratex.eu/facts-and-key-figures/>

⁶ Mapping sustainable fashion opportunities for SMEs, 2019 (Commissioned by the European Commission, DG GROW)

⁷ <https://www.eea.europa.eu/themes/waste/resource-efficiency/textiles-in-europe-s-circular-economy>

majority of production takes place. Moreover, it is estimated that less than 1% of all textiles worldwide are recycled into new textiles⁸. The presence of substances of concern hampers future high quality recycling and pollutes water and soil, and textile waste collection rates and recycling capacities are low to medium in the EU. Besides their impact on the environment, textile value chains are recognised as being long, globalised and diverse. As a result, the European textile and clothing industry faces an uneven playing field due to the often lower production costs and environmental and social standards in place in third countries. They find it challenging to prove that their products are produced under acceptable environmental and working conditions. The textile sector also suffers from skill gaps, shortages and mismatches due to the often rapid technological changes taking place that require international workforces to continuously re-adapt.

Basis for EU intervention (legal basis and subsidiarity check)

Boosting the sustainability of the sector and addressing the challenges brought about by the COVID-19 crisis are EU wide concerns, in which the stakes in terms of cross border pollution effects and impact on the internal market are high.

In order to address this, a coordinated and harmonised response at EU level will be needed to address structural weaknesses regarding textile waste collection, sorting and recycling in the Member States, and to strengthen capacity both of the industry and public authorities. Since the textile sector is highly globalised, fragmented action at national and local level will be insufficient to drive change.

A lack of EU action would undermine effective environmental protection across the EU, as well as the possibility of creating a level playing field for textile businesses in and outside the EU. The proper functioning of the internal market would also be at risk. Finally, failure to act would run counter to the strong demand from stakeholders in recent years to develop a sustainable textiles approach at EU rather than at national level.

Subsidiarity will be duly considered for any legislative action that derives from this strategy, in accordance with the better regulation guidelines

B. What does the initiative aim to achieve and how

The aim of the initiative is to set in place a comprehensive framework to create conditions and incentives to boost the competitiveness, sustainability and resilience of the EU textile sector, taking into account its strengths and vulnerabilities, after a long period of restructuring and delocalisation, and addressing its environmental and social impacts. It will ensure coherence and complementarity with initiatives under the European Green Deal, the Circular Economy Action Plan, the Industrial Strategy and the Chemicals Strategy for Sustainability⁹.

The initiative will facilitate and encourage an optimal use of the recovery plan¹⁰ and sustainable investments, in particular in production processes, design, new materials, new business models, infrastructure and capacity. Support to technologies, including through digitalisation, related to innovative textiles, tackling the release of microplastics, manufacturing and recycling processes will contribute to the digital and green transition.

To boost the EU market for sustainable and circular textiles, the initiative might consider setting targets to significantly step up reuse and recycling efforts as well as green public procurement in the EU. These objectives will be considered through a structured engagement with the industrial ecosystem and other stakeholders (i.e. research and innovation, consumer associations, investment companies, Member States, civil society), to allow for their swifter achievement, and to contribute to monitoring subsequent implementation of the initiative.

The initiative will propose actions to make the textile ecosystem fit for the circular economy, addressing weaknesses regarding sustainable production, sustainable lifestyles, presence of substances of concern, improving textile waste collection and recycling in the Member States as well as capacity building (also for skills).

The initiative will do so by identifying textile-specific and horizontal actions along the whole value chain. Taking into account the preparation of the Sustainable Products Initiative¹¹, the initiative will underline possible approaches for improving design for sustainability (ensuring the uptake of secondary raw materials and tackling the presence of hazardous chemicals, among others), facilitating its future implementation. The initiative will also propose actions to promote more sustainable production processes.

⁸ https://www.ellenmacarthurfoundation.org/assets/downloads/publications/A-New-Textiles-Economy_Full-Report.pdf

⁹ COM (2020) 667

¹⁰ COM (2020) 456

¹¹ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/12567-Sustainable-products-initiative>

In addition, the initiatives will look into supporting more sustainable lifestyles, for instance by incentivising 'product as a service' and other sustainable business models. The initiative will promote voluntary approaches such as the EU Ecolabel and look into maximising the synergies within the New Consumer Agenda¹² and the Bauhaus initiative.

The role of extended producer responsibility in promoting sustainable textiles and treatment of textile waste in accordance with the waste hierarchy will also be considered, and the implementation of the legal obligation to introduce separate collection of waste textiles by 2025¹³ will be supported.

Finally, the initiative will explore how to reinforce the protection of human rights, environmental duty of care and due diligence across value chains, including improving traceability and transparency. It will steer international cooperation and partnerships, including aid for trade, towards more sustainable consumption and production patterns, including in terms of land and water use and the use of chemicals.

C. Better regulation

Consultation of citizens and stakeholders

Stakeholders in the textile ecosystem have been very active in recent years and have shown keen interest and commitment to making the industry more sustainable. Their willingness to developing new business, behavior and consumption models are therefore of particular importance and value.

Stakeholders to be consulted will include all industry players including: fibre, yarn, fabric or clothing manufacturers, SMEs and global companies, suppliers, retailers, service providers, collectors, sorters, recyclers, research and innovation centres and other stakeholders such as public authorities, consumers and consumer associations or civil society. Consultation activities will reach out to and engage with industry and other stakeholders, including by organising workshops, (tele)conferences, and holding a 12 weeks public consultation which will be published on 'Have Your Say' portal¹⁴. Further consultation activities could include setting up a structured engagement within the textile ecosystem.

Evidence base and data collection

Several studies, policy papers and other resources exist or are in preparation that can serve as input for this initiative.

Recent studies and initiatives published include:

- A New Textiles Economy: Redesigning fashion's future¹⁵ (Ellen MacArthur Foundation)
- Textiles in Europe's circular economy (EEA briefing)¹⁶
- ECAP Summary Report 2019 – Driving circular fashion and textile¹⁷
- Circular Fashion and textile producing countries (Ecopreneur)¹⁸
- Recycled post-consumer textiles - an industry perspective (results EU Project Fibersort)¹⁹
- Circular Economy in the Textile Sector (Study for the German Federal Ministry for Economic Cooperation and Development (BMZ))²⁰
- Behavioural Study on Consumers' Engagement in the Circular Economy²¹
- Model of circular business ecosystem for textiles (VTT Technical Research Centre of Finland Ltd)²²
- Fair and Sustainable Textiles, European civil society strategy for sustainable textiles, garments, leather and footwear²³

¹² COM (2020) 696

¹³ Waste Framework Directive 2008/98/EC as amended by Directive (EU) 2018/851.

¹⁴ <https://ec.europa.eu/info/law/better-regulation/have-your-say>

¹⁵ <https://www.ellenmacarthurfoundation.org/publications/a-new-textiles-economy-redesigning-fashions-future>

¹⁶ <https://www.eea.europa.eu/themes/waste/resource-efficiency/textiles-in-europe-s-circular-economy>

¹⁷ <http://www.ecap.eu.com/>

¹⁸ <https://ecopreneur.eu/wp-content/uploads/2020/02/EcopreneurEU-Research-Note-on-Circular-Fashion-Impacts-26-2-2020.pdf>

¹⁹ <https://www.nweurope.eu/media/9453/wp-lt-32-fibersort-end-markets-report.pdf>

²⁰ https://www.adelphi.de/en/system/files/mediathek/bilder/GIZ_Studie_Kreislaufwirtschaft_Textilsektor_2019_final.pdf

²¹ https://ec.europa.eu/info/sites/info/files/ec_circular_economy_final_report.pdf

²² <https://circulareconomy.europa.eu/platform/sites/default/files/model-of-circular-business-ecosystem-for-textiles-11-2017.pdf>

²³ <https://fairtrade-advocacy.org/wp-content/uploads/2020/04/Civil-Society-European-Strategy-for-Sustainable-Textiles.pdf>

- The use of PFAS²⁴ and fluorine-free alternatives in textiles, upholstery, carpets, leather and apparel²⁵
- Study on information flows on substances of concern in products from supply chains to waste operators (including case study on clothing textiles)²⁶

Ongoing studies include:

- Circular economy perspectives in the management of textile products: study on material flows, sorting and recycling technologies and mapping circular textile business models²⁷;
- Study on the Technical, Regulatory, Economic and Environmental Effectiveness of Textile Fibres Recycling²⁸;
- Scoping study to assess the feasibility of further EU measures on waste prevention and implementation of the Plastic Bags Directive²⁹;
- Cost-benefit analysis of policy measures reducing unintentional release of microplastics;

²⁴ Per- and polyfluoroalkyl substances

²⁵ https://echa.europa.eu/documents/10162/13641/pfas_in_textiles_final_report_en.pdf/0a3b1c60-3427-5327-4a19-4d98ee06f041

²⁶ <https://op.europa.eu/en/publication-detail/-/publication/59d9b462-a9f6-11ea-bb7a-01aa75ed71a1/language-en>

²⁷ Ongoing at JRC

²⁸ Ongoing at DG GROW

²⁹ Ongoing at DG ENV