

2025

# Sustainable Mapping Report

Provided by the Experts Group of Textile



# Foreword



*The transition to a sustainable and circular economy is essential for maintaining competitiveness in a rapidly changing world. However, for small and medium-sized enterprises (SMEs) in particular, achieving greater sustainability and circularity presents significant challenges.*

*This report has been prepared by textile experts to provide EEN advisors with case studies and best practices, equipping them to support SMEs within the Enterprise Europe Network project.*

*As this document serves as a first-line resource, those requiring specialist advice or assistance can contact the EEN Textile experts (a full list is available at the end of the report).*

## Authors

This report is the result of a collaboration between the members of the Enterprise Europe Network's Sector Group Textile - subgroup Sustainability..



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# I. Introduction to Sustainable Mapping Report :::::

# 1. Textile sector



The **Textile sector** is important to the global economy and drives industrialization, trade, development and social value. The modern textile sector rapidly **develops regional and global value chains** by connecting producers, brands and retailers and consumers from across the world.

The textile sector generates an **annual revenue of about \$1.5 trillion worldwide** and growing steadily. The sector employs between 60 and 75 million people worldwide.

The **textiles and clothing ecosystem** encompass all activities that help transform natural and manmade fibers into yarns and fabrics and use these to produce a range of final products – from clothes, carpets, home textiles to industrial filters and medical textiles. **The textiles sector in Europe is known for its high-quality products**, strong brand names as well as leading position in high value- added segments such as high-end fashion.

The textiles ecosystem also includes the footwear and leather industries. **These sectors are mainly composed of smaller enterprises**, which focus on niche but high value-added segments.

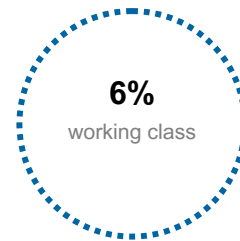
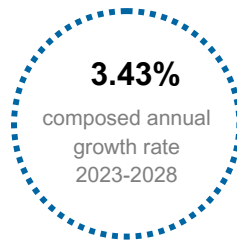
Between **2000 and 2015 textiles production around the world doubled**. Now the consumption of clothing and footwear is expected to more than double by 2030. Behind this dramatic rise is fast fashion – a term used to describe the mass production of clothing replicating recent high-fashion trends. It is a highly profitable business model that can quickly turn the latest high-fashion designs into low-cost styles for consumers.

These garments are designed to be disposable, so **fast fashion encourages unnecessary over-consumption**. This leads to excessive waste – much of which cannot be recycled. The result is a massive impact on our environment. The effects are very real and this excessive use of resources is fuelling climate change, biodiversity loss and pollution.

# 1. Textile sector



**The European Textile Market size** is estimated at 165.03 billion euros in 2023 with a composed annual growth rate of 3.43% between 2023 and 2028. The textile industry is a major contributor to the economy, employing nearly 6% of the working class in total manufacturing in Europe.



Today, the production of textiles and clothing has a **complex global value chain**. According to Euratex, the European Union imported textile products **worth 112 billion euros**, especially from China, Bangladesh, Turkey, India, Cambodia and Vietnam. However, the European Union textile and clothing sector export 48 billion worth of products, **making the European Union the second largest exporter in the world after China**.

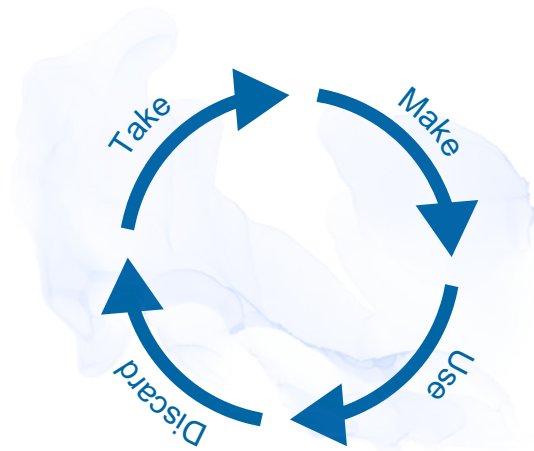
- 
- **38%** of EU turnover sold on the global market
- **€64 billion** of exports (2023)
- **€115 billion** of imports (2023)



# 1. Textile sector



The production and consumption of textile products traditionally follows a **largely linear (take, make, use, discard) economic model**. The European Union generates 12.6 million tonnes of textile waste per year. Clothing and footwear alone accounts for 5.2 million tonnes of waste, equivalent to 12 kg of waste per person every year.



According to European Parliamentary Research Service, **clothing accounts for between 2 % and 10 % of the environmental impact of European consumption**

It is also responsible for significant greenhouse gas emissions, accounting for between 2% and 8% of total emissions, and water consumption ranging from 79 to 215 billion cubic meters annually:

- **92 million tonnes of textile waste** (these waste are equal to a brushing truck of plated fabrics almost every second).

This is in addition to groundwater pollution and, quite often, especially in the case of Fast Fashion, the exploitation of workers.

Moreover, in many countries the impossibility (for logistic failure) to withdraw products from recycling stores and centres having environmental causes including microplastic pollution, water pollution and accumulation of textile waste in discharge.

This is why **the EU is taking action** to make the textiles sector more sustainable and circular.



# 1. Textile sector



**By 2030** we need to live in a World in which **1 in 5 garments** are traded through circular business models.

European Textile consumption is the fourth largest contributor to environmental pollution and climate change, following food production, housing and mobility.

The sector is also struggling to address its wide-reaching impacts, with unsustainable patterns of consumption and production creating a triple planetary crisis of faster climate change, destroying nature and increasing pollution levels.

More than this, the problem of waste in Europe is significant, with **7.5 million tons of gross textile waste generated currently**. According to McKinsey & Company (2022), at a certain point textile products become non reusable waste and it becomes necessary to recycle them into usable materials. Fiber to fiber recycling is critical as it can help turn waste into value. However **the value chain for textile recycling is not yet fully developed** and only **30/35%** of the discarded textile waste is collected.

## Key Challenges

- Keeping up with **technological developments**: embracing new technologies and ensuring adequate digital skills of workers has the potential to create higher added value products and open more creative jobs.
- Improving the **sector's sustainability**: advancing digitalisation can also help improve the sustainability of manufacturing processes, helping to produce less waste and use fewer resources.
- Ensuring **responsible corporate behaviour**: encouraging more sustainable and responsible corporate behaviour across global value chains can help to protect the environment as well as human and labour rights.





# 1. Textile sector



*How can we reduce the waste and pollution linked to the textiles sector – and save energy, water and other natural resources that are used to produce clothes?*

The answer lies in **SUSTAINABLE FASHION** that is beneficial for producers, consumers and the planet.

Circular business models represent a significant opportunity for new and better growth in the fashion industry.

The EU has a Strategy for **Sustainable and Circular Textiles** to create a greener textiles sector. The aim is a **major shift inside the industry** and among consumers, creating a whole new sustainable ecosystem for textiles by the end of this decade.

The new approach looks at the **entire lifecycle of textiles** and proposes actions to change the way we produce and consume textiles. It means that all textile products must be durable, repairable and recyclable.

**Profitable** re-use and **repair services** will be widely available, and producers will take responsibility for their products along the **supply chain**.

Extending the active **service life** of garments is considered one of the most **effective ways** to reduce the overall impact of the clothing industry. Optimising the use of clothing could contribute to:

- decreasing the need for **production** of new garments
- reduce the growing volume of **textile waste** that is generated every year.

Extending the life of clothes by an extra **nine months** of active use would reduce the carbon, water, and waste footprints by around **20–30 %** each.



# 1. Textile sector



By 2025 all European Union Member states are obliged to collect textiles waste **separately** according to the European Union Law. This will increase the **quantity** of textiles waste collected, however the **quality** of the collected items may decrease since the textiles that are currently being **incinerated** will also be collected. Therefore a higher percentage of the collected textiles waste will need to be **recycled**.

It will be important **to dematerialize** business value and shift to **circular and sustainable business models to create new opportunities**. It will also be important to ensure that consumption mitigates potential trade off as much as possible **to ensure a just transition** that avoids the loss of livelihoods.

Circularity provides a model to transform the current **linear textile economic model towards a sustainable future**.

It requires governments, businesses, and consumers to look beyond the current **“take, make and dispose”** extractive industrial model and redefine growth, focusing on positive society-wide benefits.

**Circularity’s underlying objective** is that materials should be kept at their **highest possible value** as they move and are retained as long as possible within the **textile value chain**. **This reduces and disconnects the use of natural resources and environmental impacts** from the economic activity of the textile industry, while continuing to enable improvements in human well-being.

Circularity is a means to achieving sustainable development and is central to the delivery of many of the **Sustainable Development Goals (SDGs)**, in particular **SDG 12 (Responsible Consumption and Production)**.



# 1. Textile sector



This is also reflected in the **resolution** on enhancing **circular economy** as a contribution to achieving **sustainable** consumption and production, which was adopted at the **United Nations Environment Assembly** on March 2, 2022.

**Sustainability practices** are those that balance **economic, social and environmental** considerations. Many existing and '**conventional**' sustainability initiatives in the **textiles space** (such as those focusing on scaling energy efficiency) do not pursue circularity directly, and are working to incrementally reduce **impacts** from existing systems.

However, even if **circularity** aims at a more radical **redesign of systems**, '**conventional**' **sustainability metrics** (such as worker safety, gender, GHG emissions, or water impacts) should still be used to measure the outcomes (and success or potential trade-offs) of **circular approaches**.

**Circularity** must ultimately provide improved **environmental** and **social benefits** compared to a **linear model**.

**United Nations Environment Programme** has adopted the **value chain** approach to advancing **sustainability** and **circularity** in the **textile sector**.

Taking a **value chain approach** implies looking not only at the **physical processes** (such as farms or factories) but also the way in which **products** and **services** are designed and developed, promoted, and offered to consumers.

By engaging **all actors** along the **value chain**, the **value chain approach** identifies the **most effective solutions** and defines a **common agenda** for **concerted actions** that can **transform the system**.

The **significant impacts** of the **textile value chain** are:

- Climate
- Freshwater use
- Chemical pollution (including chemicals of concern)
- Biodiversity loss
- Social issues, including labor rights, gender equality, and a just transition

All efforts must be made to **transform** the **textile value chain** towards **sustainability** and **circularity**, where it should act as a **crucial lever** for an overall transformation to a **circular economy**.



# 1. Textile sector



**Circular business models** could enable the industry to:

- ✓ Eliminate approximately 143 million tons of GHG emissions in 2030.
- ✓ Reducing overproduction by even 10 per cent could:
  - Reduce emissions by approximately 158 million tons in 2030.
  - Eliminating all overproduction would result in a significantly greater benefit.
- ✓ Transitioning towards a circular economy across sectors could create a net total of 6 million new jobs by 2030, compared to a business-as-usual scenario.

**Eliminate approximately 143 million tons of GHG emissions in 2030.**

- Reducing overproduction by even 10 per cent could
- Reduce emissions by approximately 158 million tons in 2030, while eliminating all overproduction would result in a significantly greater benefit.<sup>1</sup>
- Transitioning towards a circular economy across sectors could create a net total of 6 million new jobs by 2030, compared to a business-as-usual scenario.

**The private sector** as well as those who communicate to consumers and citizens specifically must play a strong role in creating and communicating a more sustainable and circular textile value chain, while also moving towards a **more just and equitable system**.

This includes the wider landscape of brands, advertisers, media, influencers and more who reach their audiences most frequently, who must become part of the solution to **develop and perpetuate** a new narrative for the sector, building demand, shaping desire and **demanding change** from all stakeholders **globally**.

**Trends are positive:** More and more companies are understanding the importance of adopting sustainable practices, realizing that is not just an ethical choice but also a winning strategy for the future.

Becoming sustainable aims to reduce environmental impact, improve corporate image, and create shared value.

**The most successful companies** will find a balance between sustainability initiatives, risk management and commercial imperatives!



## 2. The European Sustainable Textile Strategy



The **production** and **consumption** of **textile products** continue to grow and so does their impact on **climate**, on **water** and **energy consumption** and on the **environment**.

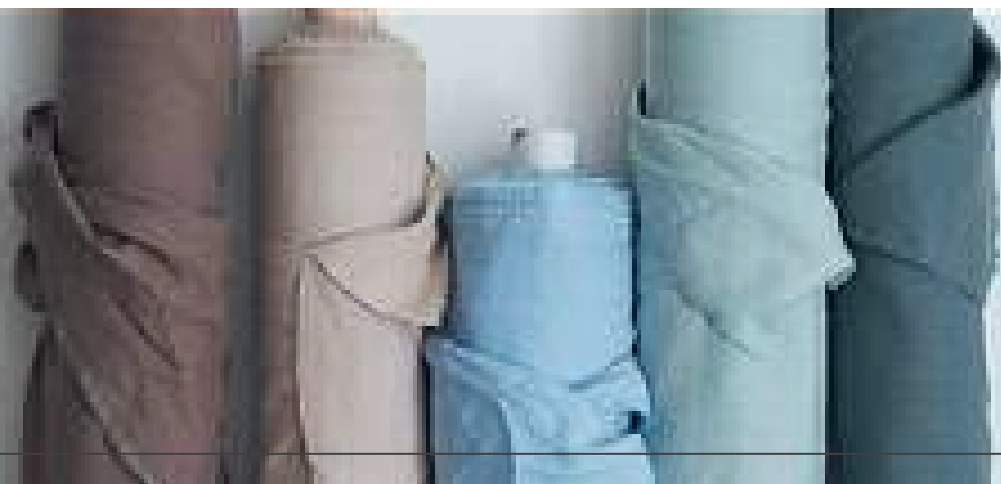
Global **textiles production** almost **doubled** between 2000 and 2015, and the **consumption** of **clothing** and **footwear** is expected to increase by **63%** by 2030, from 62 million tons now to 102 million tons in 2030.

In the **EU**, the **consumption** of textiles, most of which are imported, now accounts on average for the **fourth highest negative impact** on the **environment** and on **climate change** and **third highest** for **water** and **land** use from a global life cycle perspective.

About **5.8 million tons** of textiles are discarded every year in the EU, approximately **11kg** per person, and every second somewhere in the world a truckload of textiles is landfilled or incinerated.

As **clothing** comprises the **largest share** of EU textile consumption (81%), the trends of using garments for shorter periods before throwing them away contribute the most to unsustainable patterns of **overproduction** and **overconsumption**.

Such trends have become known as **fast fashion**, enticing consumers to keep on buying clothing of **inferior quality** and **lower price**, produced rapidly in response to the latest trends.



## 2. The European Sustainable Textile Strategy



European consumption of textiles has the **fourth highest impact** on the environment and climate change, after food, housing and mobility.



It is one of the **top three pressures on water and land use**, and the **top five in terms of raw material use and greenhouse gas emissions in the EU**.

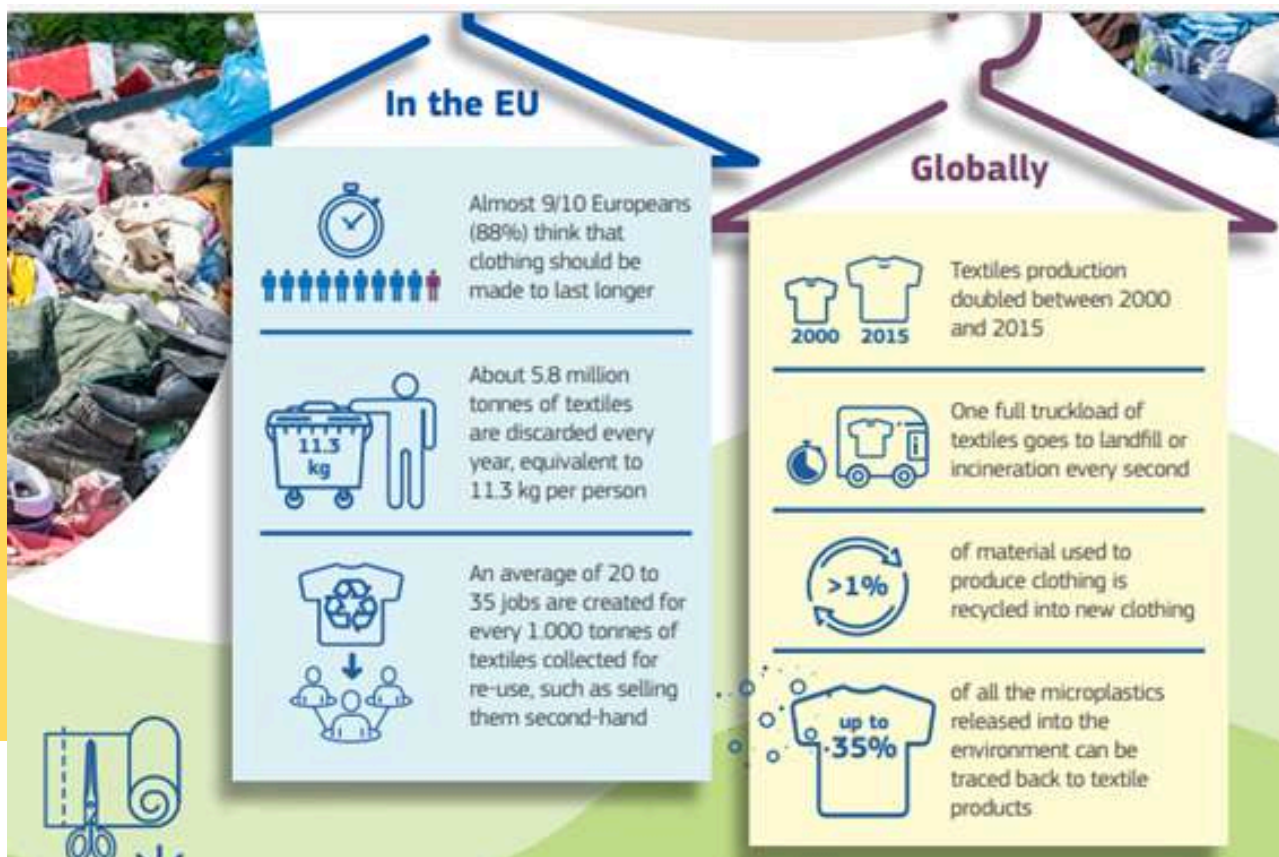


The textiles, clothing and leather manufacturing sector **employs around 1.7 million Europeans** and is a key asset to stimulate local jobs and business opportunities.

Published: 2023

Corporate author(s): Directorate-General for Environment (European Commission) Themes: Environment — Ecology , Textiles and leather

# 2. The European Sustainable Textile Strategy



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Themes: Environment — Ecology , Textiles and leather

## 2. The European Sustainable Textile Strategy



Although between **1996** and **2018 clothing prices** in the **EU** decreased by over **30%** relative to **inflation**, average household expenditure on clothing increased<sup>8</sup>, indicating that such unsustainable patterns have not allowed citizens to benefit fully from **cost-saving opportunities**.

Moreover, the growing demand for **textiles** is fueling the inefficient use of non-renewable resources, including the production of **synthetic fibers** from **fossil-fuels**. These negative impacts have their roots in a **linear model** that is characterized by low rates of use, reuse, repair and **fibre-to-fibre recycling of textiles**, and that often does not put quality, durability and recyclability as priorities for the design and **manufacturing** of apparel.

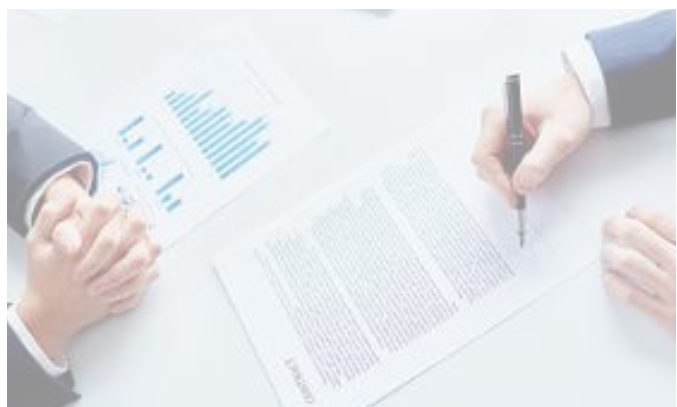
The shedding of **microplastics** from **synthetic textiles** and **footwear** during all stages of their lifecycle further adds to the **environmental impacts** of the sector.

The complex and diverse global textile value chain is also faced with social challenges, in part driven by pressures to minimize production costs to meet consumer demand for affordable products.

**Child labour** in the **apparel industry** is a grave source of concern. As **women** make up the majority of the low-wage and unskilled textile workforce, improving the sustainability of the **supply chain** has also an important **gender equality** dimension. With its increased attention to social and environmental sustainability, the EU seeks to strengthen global value chains, thus contributing to the Sustainable Development Goals worldwide.

This **Strategy for Sustainable and Circular Textiles** aims to create a coherent framework and a vision for the transition of the textiles sector:

The **EU Strategy for Sustainable and Circular Textiles** addresses the production and consumption of textiles, whilst recognising the importance of the textiles sector. It implements the commitments of the **European Green Deal**, the **Circular Economy**.





## 2. The European Sustainable Textile Strategy



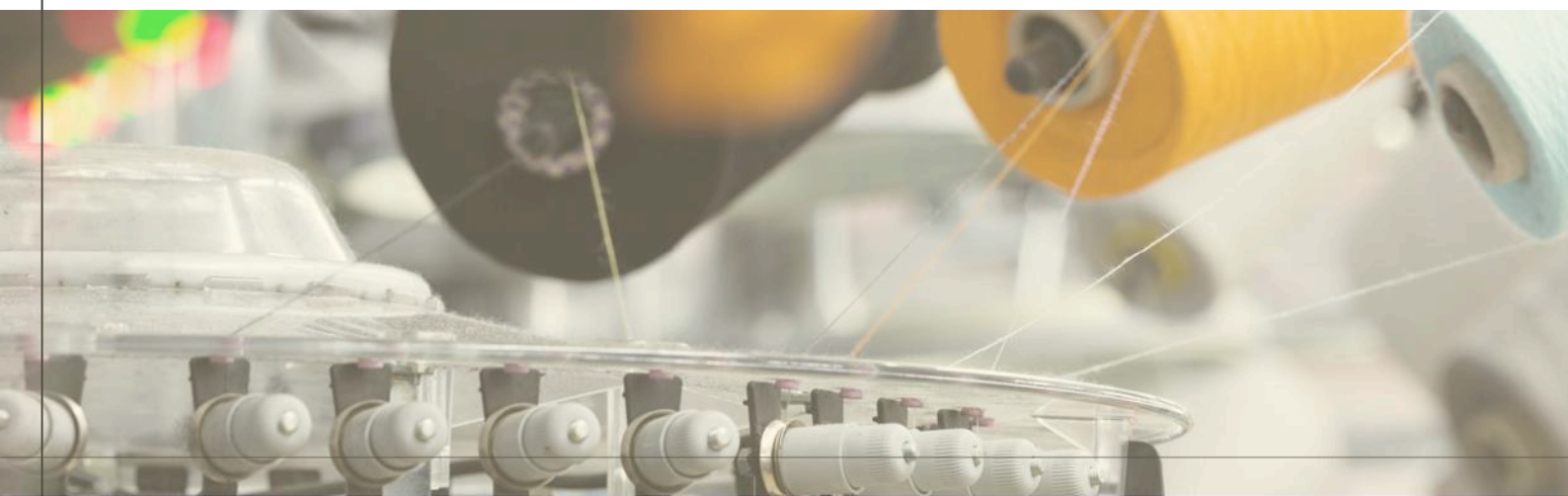
Action Plan and the European industrial strategy.

**Textiles** are the fabric of everyday life - in clothes and furniture, medical and protective equipment, buildings and vehicles. However, **urgent action** is needed as their impact on the environment continues to grow. EU consumption of textiles has, on average, the fourth highest impact on the environment and climate change, after food, housing and mobility. It is also the third highest area of consumption for water and land use, and fifth highest for the use of primary raw materials and greenhouse gas emissions.

The **Strategy** looks at the entire **lifecycle** of textile products and proposes coordinated actions to change how we **produce** and **consume textiles**.

By 2030 textile products placed on the EU market are long-lived and recyclable, to a great extent made of recycled fibres, free of hazardous substances and produced in respect of social rights and the environment. **Consumers** benefit longer from high quality affordable textiles, fast fashion is out of fashion, and economically profitable re-use and repair services are widely available. In a **competitive, resilient** and **innovative** textiles sector, producers take responsibility for their products along the value chain, including when they become **waste**.

The **circular textiles ecosystem** is thriving, driven by sufficient capacities for innovative fibre-to-fibre recycling, while the **incineration** and **landfilling** of textiles is reduced to the **minimum**.



## 2. The European Sustainable Textile Strategy



### Textile waste: Reduce, Reuse, Recycle

The proposed new EU rules on waste will support the separate collection of textile waste, which becomes mandatory in the EU in 2025. They will create:

-  **Mandatory and harmonised Extended Producer Responsibility for textiles** across all Member States with eco-modulation of fees
-  Rules to **manage textile waste in line with the waste hierarchy**: used clothes to be directed as a priority to re-use; more textile waste to be recycled
-  Incentives for producers to **increase the circularity of products** by design, innovate and boost circular economy business models
-  **Local jobs and larger markets for used textiles** and secondary raw materials
-  **Cost-saving opportunities for citizens** moving from fast fashion to timeless fashion

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Corporate author(s): Directorate-General for Environment (European Commission)

Themes: Environment — Ecology , Textiles and leather

## 2. The European Sustainable Textile Strategy



### The 2030 vision for Textiles

#### The Commission's 2030 Vision for Textiles



**All textile products** placed on the EU market are:

- durable, repairable and recyclable
- to a great extent made of recycled fibres
- free of hazardous substances
- produced respecting social rights



"Fast fashion is out of fashion" - consumers benefit longer from **high quality textiles**



Profitable **re-use and repair services** are widely available



In a **competitive, resilient and innovative textile sector** producers take responsibility for their products along the value chain



**Circular rather than throw-away clothes have become the norm**, with sufficient capacities for recycling and minimal incineration and landfilling

# 2. The European Sustainable Textile Strategy



## Key actions in the Textiles Strategy



1. Introducing mandatory Ecodesign requirements
2. Stopping the destruction of unsold or returned textiles
3. Tackling microplastics pollution
4. Introducing information requirements and a Digital Product Passport
5. Green claims for truly sustainable textiles
6. Extended producer responsibility and boosting reuse and recycling of textile waste
7. Launching the Transition Pathway for the textiles ecosystem of the future
8. Reversing the overproduction and overconsumption of clothing: driving fast fashion out of fashion
9. Ensuring fair competition and compliance in a well-functioning internal market
10. Supporting research, innovation and investments
11. Developing the skills needed for the green and digital transitions
12. Tying together a sustainable textiles value chains globally
13. Due diligence for environmental and social fairness
14. Addressing the challenges from the export of textile waste

## II. Methodology



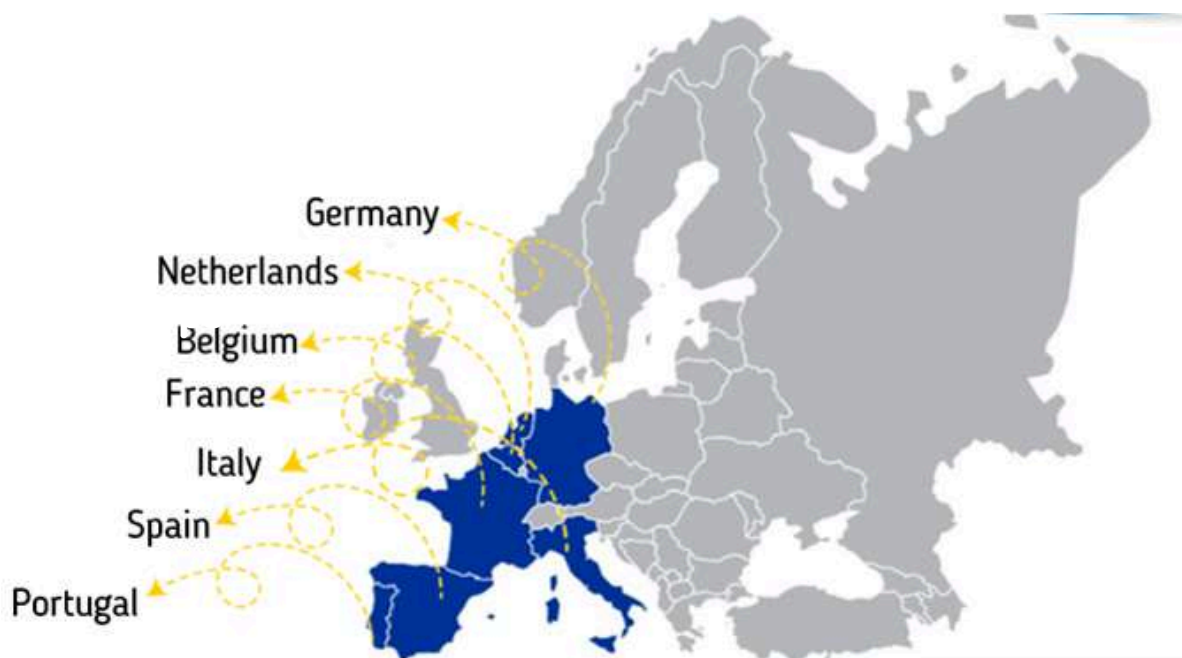
# 1. Mapping



**Circular economy** is indeed a **huge opportunity** for **companies**, but we are aware that it also brings huge changes and it is a **real challenge** mainly for **micro** and **small enterprises**.

The aim of the mapping is mainly to **share knowledge** among **SG TEXTILES MEMBERS** and to **collect best practices** in order to **help our clients** to better **cope with the challenge** of the **transformation** towards the circular economy. **Mapping** is a **work in progress**. **Mapping** is a **journey**.

## 1.1 Countries involved



These are the countries involved in this first phase of the mapping: Belgium, France, Germany, Italy, Netherlands, Portugal and Spain.

# 1. Mapping



## 1.2 Best Practices on 3 levels

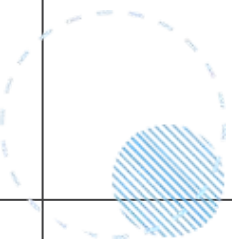
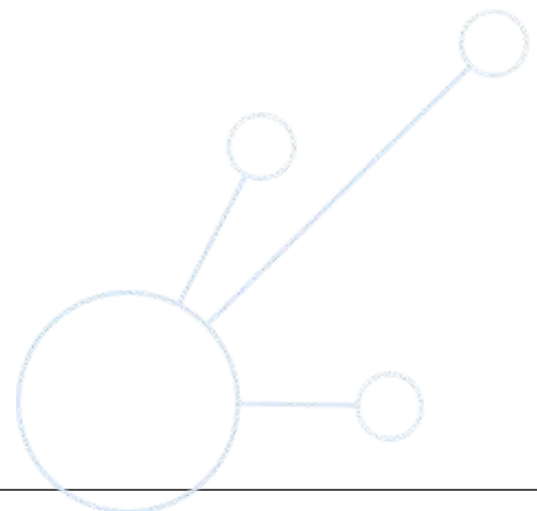
We collected best practices in circular economy on **3 different levels**:

- Government (i.e. regulations already enforced such as DPP or EPR)
- Stakeholders (Focus on: University, Research Center, Cluster, Production District)
- SMEs

## 1.3 SME Data Across Seven Countries

To gain a **clearer understanding** of the **companies** operating within the textile and clothing industry, we **gathered data** for each **country** involved in the research.

The **findings confirm** that **micro-enterprises** represent the **majority of businesses** across all seven **countries**. This **data highlights** the need for **targeted strategies**, particularly in **upskilling and reskilling** both employers and employees, to ensure a **just, sustainable**, and **circular transition**.



# 1. Mapping



TEXTILE AND CLOTHING MANUFACTURING C13-C14-C15



	Spain (December 2023)	Portugal (December 2023)	Netherlands (December 2023)	Italy (December 2023)	Germany (December 2022)*	France (December 2022)*	Belgium (December 2023)	TOTAL
0-9 EMPLOYEES	15.050	11.682	6.180	59.018	7.779	33.226	490	<b>133.425</b>
10-49 EMPLOYEES	2.115	2.387	175	10.672	1.070	1298	158	<b>17.875</b>
50-249 EMPLOYEES	288	696	40	1.170	417	311		<b>3.000</b>
MORE THAN 250 EMPLOYEES	28	50	5	143	70	59	78	<b>355</b>
<b>TOTAL</b>	<b>17.481</b>	<b>14.815</b>	<b>6.400</b>	<b>71.003</b>	<b>9.336</b>	<b>34.894</b>	<b>726</b>	<b>154.655</b>



## 2. Countries involved in the mapping



### 2.1 Belgium | SMEs

Resortecs: <https://resortecs.com/>

BekaertDeslee: <https://www.bekaertdeslee.com/en/w/bekaertdeslee-receives-six-interzum-awards>

Purfi: <https://purfi.com/>

Utexbel: <https://utexbel.com/sustainability/vision-and-objectives/>

Hnst: <https://www.letsbehonest.eu/pages/production>

Essentiel: [https://www.essentiel-antwerp.com/be\\_en/sustainability](https://www.essentiel-antwerp.com/be_en/sustainability)

Xandres: [https://www.xandres.com/be\\_nl/history](https://www.xandres.com/be_nl/history)

Studio Circulaire: <https://studio-circulaire.com/about-us/>

Dressr: <https://dressr.be/about-us/#our-story>

The Acquired: <https://the-acquired.com/>

QuiFACTum: <https://www.quifactum.com/Textile and Clothing Industry in Belgium>

Aantal werkgevers\*  
per grootteklasse in  
nace 13-14-15

		31/12/2023
werknemers	≥ 1.000	0
werknemers	+ 500	5
werknemers	200 - 499	17
werknemers	100 - 199	22
werknemers	50 - 99	34
werknemers	20 - 49	73
werknemers	10 - 19	85
werknemers	5 - 9	134
werknemers	- 5	356
<b>Totaal nace 13-14-15</b>		<b>726</b>

\* RSZ-definitie = aantal werkgevers; één werkgever kan meerdere inrichtingen hebben. Bron: RSZ FEDUSTRIA belgian federation of the textile, woodworking and furniture industries

## 2. Countries involved in the mapping



### 2. 2 France

#### | SMEs

Vivaluz: <https://www.vivaluz.fr/>

Filatures du-parc: <http://filatures-du-parc.com/>

FabBRICK | Design | Paris (fab-brick.com): <https://www.fab-brick.com/fabbrick-english>

CETIA | From goods to materials: <https://bit.ly/42vsLJE>

Fashiongreenhub - Association Mode éco-responsable: <https://bit.ly/3UttB7Z>

e-SCM - Manage and supervise your textile supplies (e-scm-solutions.com): <https://e-scm-solutions.com/en/>

Plaxtil: <https://www.plaxtil.com/>

Darwie : L'économie circulaire, pour de vrai - DARWIE

Ecollant: <https://ecollant.fr/>

Chaire BALI - Biarritz Active Lifestyle Industry (chaire-bali.fr): <https://bit.ly/495BODz>

Renaissance Textile: [RENAISSANCE TEXTILE|Plateforme Française de Recyclage Textile](#)

GEBETEX: [Grossiste Friperie France et Monde Entier - Gebetex Tri Normandie](#)

SAO TEXTILES: [Accueil - SAO](#)

TRAILLE: [Parce que rien ne se perd, rien ne se crée, tout se transforme. Nous élaborons des matériaux innovants issus de la plus belle des ressources : celle qui existe déjà.](#)

WE TURN: [Welcome to the circular fashion loop - Weturn](#)

TDV Industries: [Home - TDV Industries](#)

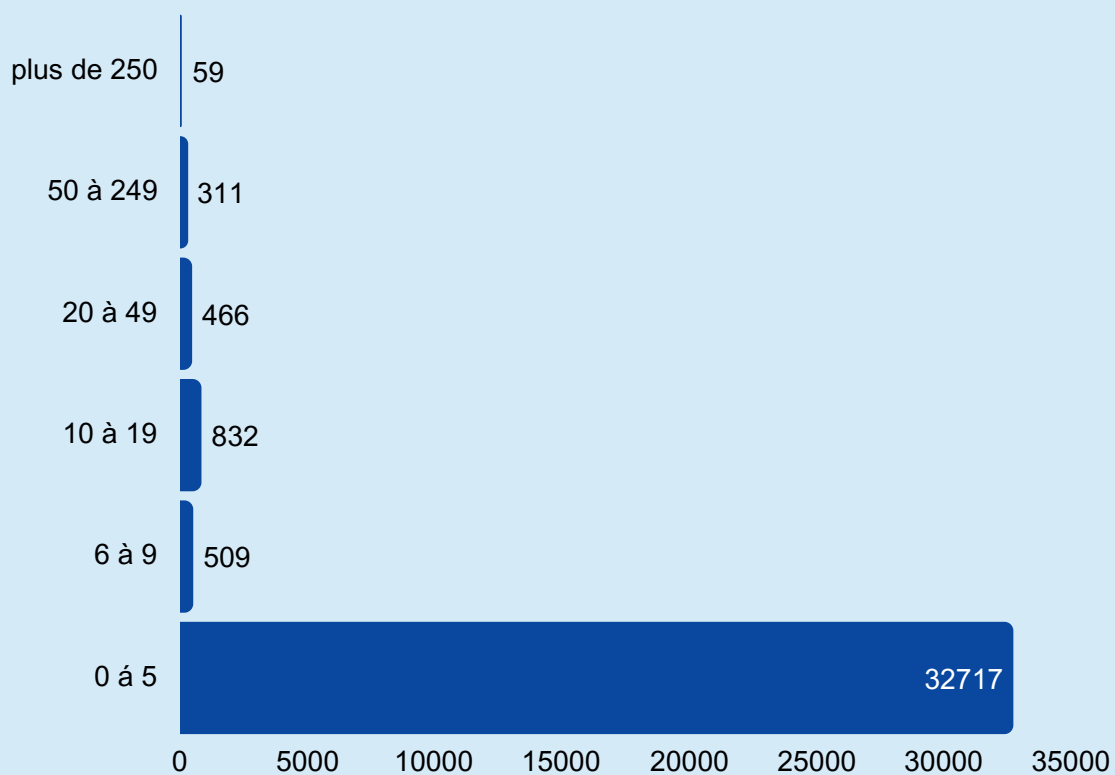
RECYOUEST: [RecyOuest](#)

TISSAGE DE France: [Accueil - Tissage de France](#)

AMAZING WASTE: [Amazing Waste - Haute école des arts du Rhin "Amazing Waste", un concours-projet entre DMC et la Haute École des Arts du Rhin | Pole Textile Alsace](#)

AUTOUR DU TISSU: [Notre partenaire AUTOUR DU TISSU | Pole Textile Alsace](#)

## 2. Countries involved in the mapping



Textiles and Clothing Industry in France

## 2. Countries involved in the mapping



### | Government

The “**textile, household linen and footwear sector**” was introduced by French regulations in **2007**, initially to manage waste. Today, the challenges facing the sector in France go much further.

Since **January 2023**, the “**Anti Waste for Circular Economy**” law prohibits textile, household linen and footwear brands from **destroying their unsold new products**. Producers and distributors must therefore rethink the end-of-life of their products by donating, reusing or recycling their unsold stock. They also need to identify the best distribution channel. The main objective is to develop a **circular economy** for textiles, linen and footwear in order to:

- **Encourage marketers to eco-design their products**
- **Develop repair**
- **Develop re-use and re-employment**, notably in conjunction with social economy operators
- **Raise public awareness** of these initiatives and of the correct sorting of TLC perceived as non-reusable or non-recyclable.
- **Finance communication initiatives** by local authorities
- **Develop the collection of TLCs** by providing and supporting operators in the sector, including local authorities and social and solidarity-based economies, and by prioritizing certain territories.
- **Develop the recovery of TLCs** as soon as they are collected, by providing for their processing, in particular via take-back from collection and sorting operators, and by supporting these operators and sorting operations.
- **Contribute to research and development projects** on TLC recycling.

## 2. Countries involved in the mapping



### | Government

#### **EPR and economic incentives to make products more sustainable**

Refashion/Eco TLC is the textile, household linen and footwear sector Industry's eco-organisation. It manages the prevention of waste and management of the end-of-service life of products on behalf of the 5000 companies placing goods onto the market.

After 10 years of existence, Eco TLC has been renamed Refashion, one name for all, professionals and the general public alike. The name Refashion recalls founding origins and opens up new fields of possibilities and activities: repairing, reusing, recycling, redesigning, rethinking, reinventing, reconsidering alongside our partners and the general public.

At the heart of the industry's ecosystem, Refashion provides tools, services and information that facilitates and accelerates transformation and also participates in funding the transition towards a circular economy.

### | Stakeholders

**(Actions/Projects by major stakeholders) Focus on: University/ Research Centre – Cluster – Production District**

#### **Green Claims**

Recycl'Occ the ethical revival of the textile industry whose objectives are both economic and environmental: "to support cluster members in developing new activities, to find new outlets for used textiles, to recover brands' unsold stock and to support the development of new shops".

## 2. Countries involved in the mapping



### | Stakeholders

#### **EPR and economic incentives to make products more sustainable**

##### [Refashion.fr](#)

Re Fashion is the French eco organisation for the clothing, household linen and footwear industries within the framework of the AGECL law.

On behalf of more than 5,000 companies, it is responsible for preventing and managing the end-of-life of products placed on the consumer market. Refashion offers tools, services and information to facilitate and accelerate the transformation towards a circular economy.

##### [Repair bonus for clothes and shoes](#)

A repair bonus on textiles and footwear was introduced by the Government on November 7, 2023. When you visit an approved repairer, a discount is applied directly to your bill for repairing the heel of your shoes or patching a hole in your clothes, for example.

##### [Flyer-EcoDesign-BECOME-N-A.pdf](#)

"Become" : a regional public eco-design program in Nouvelle Aquitaine

Awareness-raising, guidance and support for companies in the Nouvelle-Aquitaine region to develop an eco-design project.

##### [Paris Good Fashion](#)

Paris Good Fashion aims to make Paris the capital of a more responsible fashion by 2024, the year of the Olympic Games. It is an association under the French law of 1901 which gathers more than a hundred professional actors (companies, designers, NGOs, institutional ...) committed to accelerating change and transforming the practices of fashion companies whose activity is strongly linked to Paris.

## 2. Countries involved in the mapping



### | Stakeholders

#### Paris Good Fashion

► Our **mission** focuses on **concrete actions, sharing good practices** and **collective intelligence** for a more conscious and **sustainable fashion**. Only together will we succeed in this **systemic change**. How can we do this? By developing **tools** (a self-diagnosis, a glossary, guides...) and working groups to move forward on major themes of **sustainable development**.

► Our **purpose** is to bring all **actors together**, whatever their field of expertise (fashion, accessory, luxury, ready-to-wear, brand, distributor...) to co-construct and **share best practices**.

**Le CRITT Horticole, expertise en ingénierie horticole en Nouvelle-Aquitaine: expertise in plant dyes.**

There are many avenues for development and innovation, and the CRITT Horticole has chosen to explore the following, either in-house or at the request of companies: diversification of plant sources / using by-products from agriculture or the food industry / reducing the use of mordants for plant dyeing / improving the fixation and stability of plant dyes/ the development of a new generation of pigment / the use of new, innovative extraction processes / vegetable dyeing of bio-sourced or recycled materials

## 2. Countries involved in the mapping



### 2.3 Germany

#### | SMEs

**VAUDE** is a manufacturer of outdoor clothing and equipment. The SME is fully committed to the principles of **sustainable clothing**. They have created their own **seal for eco-friendly products** that is stricter than regular public labels.

Their product designers have to take into consideration:

- **Material efficiency**
- That the product can be **washed at 30 degrees**, doesn't need to be **dry cleaned**
- That it has a **long lifetime**, can be **easily repaired** and **recycled**
- The chosen materials have to fulfil their own standard regarding **eco-friendliness** that comprises other standards like **GOTS**, **bluesign** or the **Global Recycling Standard**
- Very often they use **recycled materials**

In the production process many **environmental and social standards** have to be respected (EMAS, ISO 14001, "Fair wear" etc.).

**VAUDE** has a big **repair workshop** and spare parts, they have **repair videos** on their website and on the repair platform "**FIX-IT**".



## 2. Countries involved in the mapping



### 2.3 Germany

#### | SMEs

They are investing in new business models like **leasing instead of buying**, they are about to build up a **take-back system** to prepare old products again for the market.

Regarding the **end of life** of a product they are investing in technologies that facilitate to manufacture products only from **one material**.

**VAUDE** is a member of standardization committees (i.e. “**Accelerating Circularity**”) in order to find a **common denominator** within the complex system of the textile circular economy (collectors, sorters, pre-processors, chemical and mechanical recyclers, yarn spinners etc.). This way they get to know what components are allowed in order to make a product **recyclable**.

<https://www.vaude.com/de/de/>

#### **Gebr. Otto**

**Cotton yarn spinning mill** implementing a model system to know their **supply chain**.

<https://www.otto-garne.com/en>

## 2. Countries involved in the mapping



### | SMEs

The National Statistics Office for 2022

NACE 13	Companies	Employees
0 - 10	3.377	6.078
10 - 50	681	15.782
50 - 250	293	32.500
More than 250	38	17.235

NACE 14	Companies	Employees
0 - 10	3.274	2.210
10 - 50	254	5.487
50 - 250	83	8.664
More than 250	19	14.250

NACE 15	Companies	Employees
0 - 10	1.128	1.735
10 - 50	135	2.745
50 - 250	41	4.648
More than 250	13	6.684

[Click here to read the full data.](#)

## 2. Countries involved in the mapping



### | Government

No regulation on EPR for textiles is in force so far. In the fourth quarter 2023 the BMUV (Bundesministerium für Umwelt und Verbraucherschutz) is supposed to publish an EPR model for textiles. The model will take into account the EU-COM's requirements published in the proposal for amending the waste directive on 5.7.2023.

#### **German Law on Due Diligence in Supply Chain (Lieferkettensorgfaltspflichtengesetz – LkSG)**

The Due Diligence Act is applicable to companies that have at least 3,000 employees and their main administration, main branch or registered office in Germany. From 2024, the applicability threshold will drop to 1,000 employees, with a re-evaluation to take place thereafter.

The law sets out legally binding duties of care and action with regard to internationally recognized human rights. In their own interest, companies are encouraged to identify and remedy impending violations of human rights.

The Green Button is a government-run certification label for sustainable textiles. What makes it special: it is the first certification label that systematically evaluates whether companies take responsibility for respecting human rights and environmental standards in their supply chains.

<https://www.gruener-knopf.de/en>

## 2. Countries involved in the mapping



### | Stakeholders

#### **Sustainability laboratory at Reutlingen University / textile faculty.**

The “**Sustainability Laboratory**” is a port of call for all sustainability issues of the textile faculty. It is the interface between teaching, research and practice as well as between education and training <https://www.tex.reutlingen-university.de/de/forschung/nachhaltigkeitslabor/>

#### **Helpdesk on Business and Human Rights**

The helpdesk advises companies on the implementation of the human rights due diligence process. <https://wirtschaft-entwicklung.de/en/helpdesk-on-business-human-rights/>

#### **Partnership for Sustainable Textiles**

The multi stakeholder initiative provides comprehensive information and support for companies that are (indirectly) concerned by the Due diligence Act <https://www.textilbuendnis.com/>

#### **The UN Global Compact Network Germany**

Offers a lot of webinars, mentoring programmes etc. regarding business & human rights, environment & climate and corruption prevention. [https://www.globalcompact.de/en/Textiles and Clothing Industry in Germany](https://www.globalcompact.de/en/Textiles%20and%20Clothing%20Industry%20in%20Germany).

## 2. Countries involved in the mapping



### 2.4 Italy

#### | SMEs

**Po.in.tex** is an association of companies, research organizations, foundations and associations, with a focus on textile, founded in 2009 by Piemonte Region and managed by Città Studi Biella. Since its foundation, its aim is to promote competitiveness and cooperative innovation, favoring the constant exchange between innovation demand and offers

Website: <https://www.pointex.eu/en/>

**Magno Lab** is a network of companies localized in Biella that was established to develop collaborative projects related to the textile sector, characterized by a high rate of innovation and sustainability

Website: <https://www.magnolab.com/>

#### **Eco-design / circularity**

**GAIA SEGATTINI** Noteware – The yarns used are high quality production leftovers, both for sustainability reasons and to limit supply waste. The garments combine machine-made techniques and handmade details to ensure the highest levels of production, craftsmanship and respect for the environment

Website <https://gaiasegattiniknotwear.it/en/>

**ZEROBARRACENTO** Zero waste outerwear in Italy. The patterns are developed according to a zero - waste pattern making, an innovative design technique that allows to use the fabric in its entirety, with no waste at the design stage of a garment, which is usually around 15%.

Website: <https://zerobarracento.com/>

## 2. Countries involved in the mapping



### 2.4 Italy

#### | SMEs

**MUST HAD** the software produced enables client companies to reuse, repurpose and recycle textile products at the end of their lives to minimize new production and prevent disposal. The result is in the reintroduction into the marketplace of products that would otherwise likely end up in landfills or incinerated, thus reducing the need for "virgin" production and the environmental impact it generates.

Website: <https://musthad.com/>

**ITALCONCIA** has developed a new 97% Bio Based leather, which is distinguished by the absence of materials from the petroleum industry and substances that are harmful or damaging to the environment.

Website: <https://biobasedleather.it/>

#### **Restrict the export of textile waste**

**Aroundrs srl** aims for a circular and digital food packaging system to eliminate waste in a smart and affordable way for all.

Website: <https://www.aroundsr.it/>

#### **Incentivise circular business models, including reuse and repair**

**ASTRI** Italian Textile and Recycling Association was born in order to increase the value of what Prato has been doing for decades, that is to produce regenerated textiles.

Website: <https://astrirecycling.it/>

**Atelier Riforma** has developed an innovative digital marketplace that matches B2B supply and demand for used garments, both an Artificial Intelligence technology to extract from the garment's image all useful data for its circular recovery, allocating it to the most efficient solution.

Website: <https://atelier-riforma.it/?lang=en>

## 2. Countries involved in the mapping



### 2. 4 Italy

#### | SMEs

**RIFo' recover** used clothing, regenerates its yarn through the wisdom of local artisans, and uses it to make new garments 100% recycled.

Website: <https://rifo-lab.com/en>

**ReLearn** using a plug-and-play IoT device to monitor and measure the waste produced, we help people and companies immediately reduce their environmental footprint.

Website: <https://www.re-learn.eu/>

**VEGEA company** develops an innovative material characterized by the high content of vegetal, renewable and recycled raw materials: grape leftovers from winemaking, vegetal oils and natural fibers from agriculture. It is used in fashion, interior and packaging.

Website: <https://www.vegeacompany.com/>

**ORANGE FIBER** is the first brand in the world to produce sustainable textiles from citrus juice by-products. The innovative process has been patented since 2014.

Website: <https://orangefiber.it/process/>

**FILIPARI company** specializing in the production of textiles made from marble dust and minerals creates a synergy between the textile and stone sectors, creating a circular economy by reusing waste materials.

Website: <https://filipari.com/en/>

**GIDA SPA** provides used water recovery and distribution services and carries out in-house disposal of most of the products' sewage residues. It experiments with new forms of reuse of purified water in the industrial

. nursery and landscape sectors

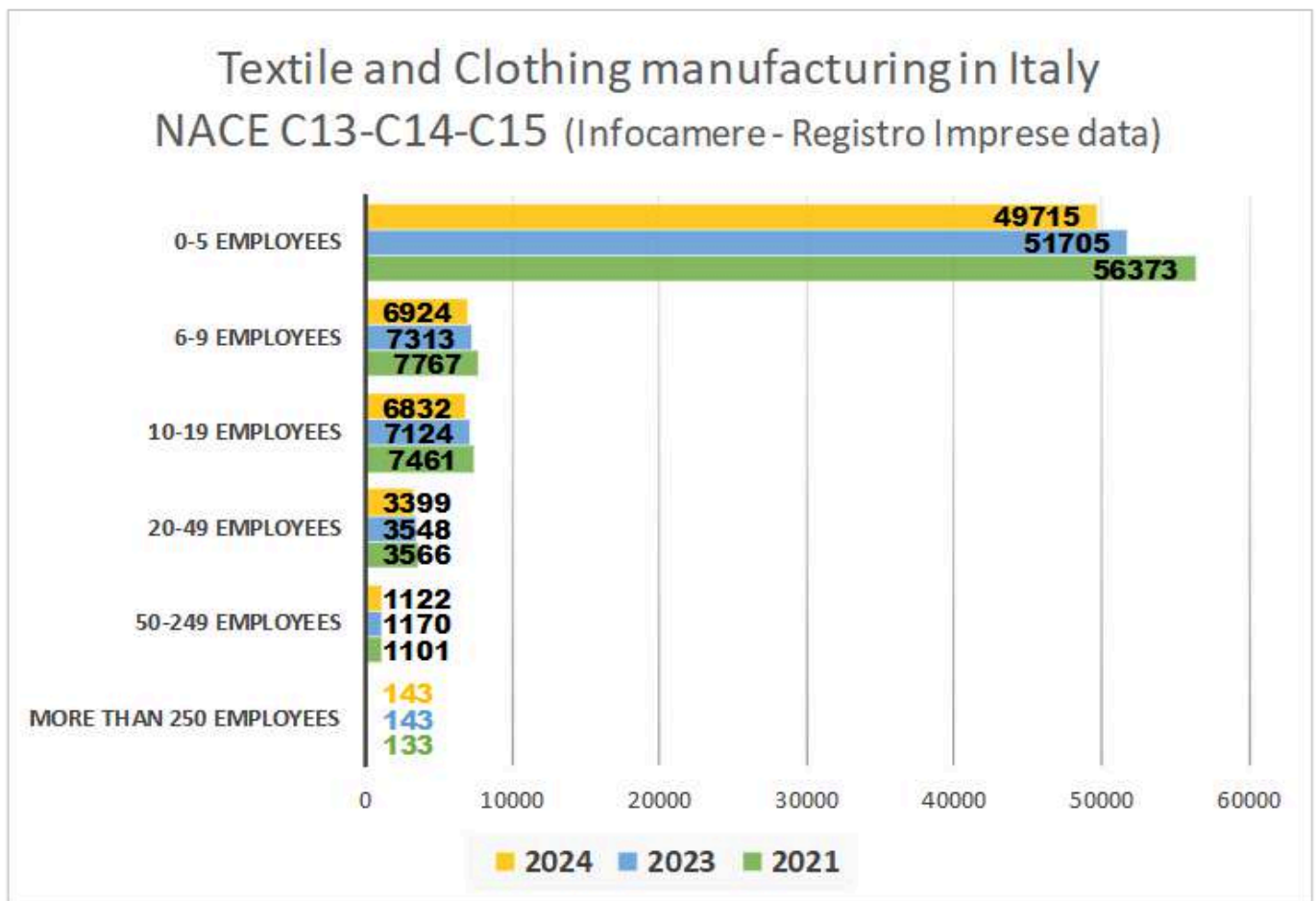
Website: <https://www.gida-spa.it/>

## 2. Countries involved in the mapping



### 2.4 Italy

#### Textile and Clothing Industry in Italy



Total in **2024**: 68.135 Total in **2023**: 71.003 Total in **2021**: 76.401

	2021	2023	2024
TOTAL	76.401	71.003	68.135

Data from Infocamere – Registro Imprese



## 2. Countries involved in the mapping



### | Government

#### **Eco-design / circularity**

The National Recovery and Resilience Plan (NRRP) launched by the government and in particular the investment action "Circular Economy Flagship Projects" allocates 600 million euros for measures aimed at strengthening the network of separate collection and treatment/recycling facilities by contributing to the achievement of the following targets equal 100% recovery in the textile sector through "Textile Hubs."

#### **EPR and economic incentives** to make products more sustainable

The Italian government has implemented Directive 851/2028, with the implementing legislative decree 116/2020, which amended the provisions of Legislative Decree No. 152/2006 (Environmental Code) and introduced the minimum requirements in the presence of which EPR hypotheses are configured.

On February 2023, the Ministry of Environment and Energy Security (MASE), in consultation with the Ministry of Enterprise and "Made in Italy" (MIMIT), presented an outline of a decree on extended producer responsibility in the textile sector and launched a public consultation procedure, with the aim of involving key stakeholders in the adoption of legislation consistent with the current fashion industry



## 2. Countries involved in the mapping



### | Stakeholders

**The National Technology Cluster "Made in Italy" (MinIT)** is an association that aims to encourage and **promote** an **ecosystem** based on **technology transfer** and innovation, able to bring about **sustainable**, integrated and inclusive economic growth for companies operating in the Made in **Italy sector**. The **Cluster** includes entities operating in the fields of research, technology transfer and business and market development, such as universities, research organizations, business associations, companies and institutions. Website: <https://www.clusterminit.it/?lang=en>

**AFIL** Associazione Fabbrica Intelligente Lombardia is the region's **technology cluster** working to create a stable **collaboration** between companies, universities, research institutions and associations in order to develop Research & Innovation projects that can benefit Lombardy's manufacturing companies. Website: <https://afil.it/en/>

**CLUSTER CREATE** is the **cultural** and creative cluster of the Emilia-Romagna region, an association of public and private entities: companies, research centers and **training institutions** that share skills, ideas and **resources** to **support** the competitiveness of the creative sector with a specific focus on the **textile** and fashion sector. Website: <https://create.clust-er.it/en>

**Monitor for Circular Fashion** is a project involving leading fashion companies and supply chain players with **scientific input** from the SDA Bocconi Sustainability Lab and Enel X with the goal of promoting the transition to **circular business models** in the **fashion industry**.

Website: <https://www.sdabocconi.it/en/faculty-research/research/new-value-knowledge-platform/sustainability-lab/monitors/monitor-for-circular-fashion>

## 2. Countries involved in the mapping



### | Stakeholders

#### **Eco-design / circularity**

**Prato district** is considered one of the **largest industrial districts** in Italy, the largest **textile center** in Europe and one of the most important centers in the world for the production of woolen yarns and fabrics. Its fortune is based on **sustainability** and **circular economy**. Out of the **5 billion** in turnover of the entire district, as much as 1.5 comes from the textile recycling sector. Mechanical recycling of textiles is in use.

**CLEANTEK** project aims to develop customised training materials for companies and university students in the textile sector about circular economy and eco-design to boost their innovation potential to thrive **sustainable solutions**. The partnership brings together 8 institutions from 6 European countries with complementary **profiles** and **competencies**. The partnership includes universities, training centres, technological centres and **non-profit institutions**. Website: <https://cleantekproject.eu/>

**INMATEK** - INteraction MAterial EXperience Lab, is a research laboratory of Bari Polytechnic University that deals with **materials** as tools to reactivate the **perceptual-sensory characteristics** of surfaces. It has mapped **local supply chains** (Mezzogiorno) with a focus on natural fibers of plant and **animal origin** and has worked for the remanufacturing of historical and artisanal processes.

Website: <https://research.poliba.it/laboratories/inmatex>

#### **Release of microplastics** from textiles

**Innovhub** - Stazioni Sperimentali per l'Industria Srl is a national research, innovation and **technology** transfer centre, providing **technical-scientific** advice, testing and analyses of materials. It is involved in an international project to develop methods for the **analysis** of **microplastics** in different matrices and to study production processes in the textile industry and in a project to study the Silk Life Circle **Assessment**.

Website: <https://en.innovhub-ssi.it/>

# 2. Countries involved in the mapping



## 2.5 Netherlands

### | SMEs

Nace Chapter 13 Textiel Manufacturing	3045 companies
Nace Chapter 14 Clothes Manufacturing	2595 companies
Nace Chapter 15 Leather & Shoe Manufacturing	760 companies
	-----
Total	6400 companies

Source: CBS

Textile and Clothing Industry in Netherlands



## 2. Countries involved in the mapping



### 2.6 Portugal

#### | SMEs

Acatel | <https://acatel.pt/about-us/>

Adalberto Textile Solutions | <https://www.adalberto.pt/>

Burel Factory | <https://burelfactory.com/en>

JF Almeida | <https://www.jfa.pt/en/>

Polopiqué | <https://polopique.pt/>

RDD Textiles | <https://rddtextiles.pt/>

Riopele Têxteis, S.A. | <https://www.riopele.pt/>

Tearfil | <https://www.tearfil.pt/>

Tintex Textiles, S.A. | <https://tintextextiles.com/>

Wonder Raw | <https://store.wonder-raw.com/>

Economic activities (Subclasse - CAE Rev. 3) (1)	Enterprises (No.) by Economic Activity (Subclass - CAE Rev. 3) and Employment bracket; Annual (2)					
	Geographical location (Portugal)					
	Portugal					
	PT					
	Data reference period					
	2023					
	Rank of staff employed					
	Total	Less than 10 people	10 - 19 people	20 - 49 people	50 - 249 people	250 people and more
	N.º	N.º	N.º	N.º	N.º	N.º
	<b>Total</b>	1510274	1454022	30585	16898	7552
<b>Manufacture of textiles</b>	3620	2887	303	240	167	23
<b>Clothing industry</b>	8511	6921	666	581	329	14
<b>Leather and leather products industry</b>	2684	1874	293	304	200	13

Enterprises (No.) by Economic Activity (Subclass - CAE Rev. 3) and Employment bracket; Annual - INE, Integrated Business Accounts System

## 2. Countries involved in the mapping



### | Government

**Decree-Law no. 102-D/2020 of 10th December** approving the **general waste management regime**, the **legal regime for the landfill of waste** and amending the regime for the **management of specific waste streams**, transposing **Directives (EU) 2018/849, 2018/850, 2018/851 and 2018/852**.

#### **Guide to Environmental Claims in Marketing**

**Communication published by the Directorate-General for the Consumer (DGC) and the Portuguese Advertising Self-Regulation entity (ARP)** for SME that aim to associate their brands with the theme of **sustainability**, in particular with regard to the environmental aspect, using environmental claims.

(<https://www.consumidor.gov.pt/comunicacao/publicacoes.aspx>)

**BETTER PLASTICS** a Portuguese mobilising R&D project for the plastics sector to ensure a new, sustainable value chain and the **circularity of plastics**.

(<https://www.betterplastics.pt/en/>)

**SILiAmb Portuguese Integrated Environmental Licensing System** is a platform where citizens and companies can present licensing requests and communicate data to **The Portuguese Environment Agency (APA)**, thereby fulfilling their obligations in the **environmental area**.

(<https://siliamb.apambiente.pt/pages/public/login.xhtml>)

**Textile Waste Collection:** Portuguese law mandates **municipal waste management systems** to provide separate collection schemes for textile waste by 1st January 2025.

## 2. Countries involved in the mapping



### | Government

**Decree-Law No. 24/2024:** This amendment to Decree-Law No. 152-D/2017 introduces new waste management regulations, effective from 1st January 2025. It includes:

- Extended Producer Responsibility (EPR) for furniture, mattresses, and home health self-care products

- Mandatory annual reporting of reusable packaging
- New labeling requirements for reusable packaging
- Eco-modulation criteria, effective January 1, 2026

### | Stakeholders

**Hi-Tech-TEX** - New sustainable and cross-sectorial value chains towards excellence in Hi-Tech Textiles.

More info here: <https://www.clustertextil.pt/en/hi-tech-tex-project>

**GIATEX** - Aims to respond to challenges faced by textile refinement companies in terms of intensive water consumption.

More info here: [https://www.citeve.pt/inteligencia\\_tecnologica/projetos/giatex\\_2-dffadbca](https://www.citeve.pt/inteligencia_tecnologica/projetos/giatex_2-dffadbca)

## 2. Countries involved in the mapping



### | Stakeholders

**Be@t** - Seeks to contribute to generate and consolidate an innovative, sustainable and circular TCS through the development of traceable textile products and materials of biological origin, renewable and with better environmental credentials.

More info here: [https://www.citeve.pt/inteligencia\\_tecnologica/projetos/be\\_t\\_4-8c3cb7a3](https://www.citeve.pt/inteligencia_tecnologica/projetos/be_t_4-8c3cb7a3)

**TEXP@CT** - Seeks to be a response to the challenge of the digital transition and adaptation to Industry 4.0 in the TCS.

More info here: [https://www.citeve.pt/inteligencia\\_tecnologica/projetos/texp\\_ct\\_2-4d1d0227](https://www.citeve.pt/inteligencia_tecnologica/projetos/texp_ct_2-4d1d0227)

**RDC@ITV** - Aims to develop a roadmap for the decarbonisation of the TCS, where the main vectors and trajectories for the decarbonisation of the TCS will be defined.

More info here: [https://www.citeve.pt/inteligencia\\_tecnologica/projetos/rdc-itv-44A4E4D5](https://www.citeve.pt/inteligencia_tecnologica/projetos/rdc-itv-44A4E4D5)

The "**Lusitano**" project, a mobilising agenda for business innovation in the textile and clothing industry in Portugal, with an investment of 111.5 million euros to develop sustainable textile solutions, including yarns and fabrics based on natural and recycled fibers, create energy and resource management solutions for the TCI and implement products for agile and sustainable continuous improvement.

More info here: <https://tecnico.ulisboa.pt/en/news/tecnico-joins-consortium-to-boost-the-textile-industry/>

**Textile and Clothing Industry in Portugal** : [https://drive.google.com/drive/folders/1tT-NsQIROsH3INT1rSJx3vNB\\_HpIMoMs?usp=sharing](https://drive.google.com/drive/folders/1tT-NsQIROsH3INT1rSJx3vNB_HpIMoMs?usp=sharing)



## 2. Countries involved in the mapping



### 2.7 Spain

#### | SMEs

#### Textile companies in Spain (NACE 13-15)

	Number of companies	Percentage
Number of companies 0-5 employees	13.730	78.54%
Number of companies 6-9 employees	1.320	7.55%
Number of companies 10-19 employees	1.341	7.67%
Number of companies 20-49 employees	774	4.43%
Number of companies 50-249 employees	288	1.65%
Number of companies with more than 250 employees	28	0.16%
<b>TOTAL</b>	<b>17.481</b>	

.....  
Data: December 2023

Source: Instituto Nacional de Estadística <https://www.ine.es/jaxiT3/Tabla.htm?t=39372>

In **Spain** there are **17.481 textile and fashion companies** (under NACE code 13, 14 and 15). 78,54% of them have **less than 5 workers**. There are only **28 Textile and Fashion companies having more than 250 employees** in the country.

Spain has traditionally had a **strong textile industry**, especially in Galicia (Inditex), Valencia (shoe industry) and Catalonia (knitwear, technical fabrics, textile machinery, SME brands). The most important **Technology Center** specifically dedicated to Textile (AITECH) is located in **Alcoi** (Valencia region).

## 2. Countries involved in the mapping



### 2.7 Spain

#### | SMEs

##### **ANANAS ANAM:**

A pioneer company in the creation of Piñatex®, a sustainable and leather-alternative textile material made from pineapple leaf fibers. Its goal is to offer innovative and sustainable solutions that minimize environmental impact.

Website: <https://www.ananas-anam.com/>

##### **ANTEX:**

Specializes in the production of synthetic fibers and technical yarns for various industries, including textiles, automotive, and fashion. It stands out for its focus on innovation and sustainable development through the use of recycled materials.

Website: <https://antex.net/>

##### **BCOME:**

A digital platform that provides sustainability solutions to fashion companies by measuring the environmental, social, and ethical impact of their products, helping improve traceability and transparency throughout the value chain.

Website: <https://bcome.biz/>

##### **COLEO RECYCLING:**

A company dedicated to textile recycling, specializing in creating new products from post-consumer textile waste. It collaborates with fashion companies to offer sustainable solutions.

Website: <https://coleo.es>

##### **ECOALF:**

A Spanish brand internationally recognized for its commitment to sustainable fashion, using recycled materials to manufacture its products. Its slogan "Because there is no planet B" reflects its environmental philosophy.

Website: <https://ecoalf.com/>

## 2. Countries involved in the mapping



### 2. 7 Spain

#### | SMEs

##### **ERUM:**

A company with over 80 years of history, specializing in providing sustainable solutions for the textile and packaging sectors. It offers recycled and recyclable products with a focus on the circular economy.

Website: <https://erumgroup.com/rts/>

##### **HILATURAS ARNAU:**

A manufacturer of sustainable yarns with a strong commitment to textile recycling and the circular economy. It develops innovative products from recycled fibers, reducing natural resource consumption.

Website: <https://www.hilaturasarnau.com/>

##### **INFINIT DENIM:**

A company dedicated to producing garments and accessories from recycled denim. Its mission is to reduce the environmental impact of the denim industry by reusing materials.

Website: <https://infiniteatdenim.com/>

##### **INFINITE ATHLETIC:**

A sportswear brand that uses recycled materials to create high-quality sports clothing. It focuses on sustainability and textile innovation, promoting more responsible consumption.

Website: <https://infiniteathletic.com/>

##### **JENEALOGIA:**

A technology company leading innovation in the textile sector by developing sustainable technologies for denim finishing, significantly reducing water, energy, and chemical consumption.

Website: <https://www.jeanologia.com/es/>

## 2. Countries involved in the mapping



### 2. 7 Spain

#### | SMEs

##### **MARGASA:**

A specialist in machinery for textile recycling, known for its innovations in processing textile waste for reuse in new production processes.

Website: <https://www.margasa.com>

##### **MARINA TEXTIL:**

A manufacturer of technical fabrics specialized in protection and safety. Its products are designed for industrial, military, and firefighter sectors, with a strong focus on quality and sustainability.

Website: <https://marinatextil.com/es>

##### **ORGANIC COTTON COLOURS:**

A company promoting the use of organic cotton without dyes or chemicals, sustainably and responsibly grown. It offers high-quality textiles while respecting the environment and local communities.

Website: <https://www.organiccottoncolours.eco/ca/>

##### **PICVISA:**

A technology company developing AI and machine vision solutions for recycling. Its technology is applied in the classification of textile waste, contributing to a circular economy.

Website: <https://picvisa.com/en/>

##### **RECIPUR ECO, S.L.:**

Specialized in recycling mattresses and polyurethane foams, offering sustainable solutions for repurposing these materials into new products.

Website: <https://recypur.es/>

## 2. Countries involved in the mapping



### 2. 7 Spain

#### | SMEs

##### **TEJIDOS ROYO:**

A sustainability leader, this company manufactures innovative fabrics using processes that minimize environmental impact, such as using recycled fibers and water-saving dyeing technologies.

Website: <https://www.tejidosroyo.com/sostenibilidad.ph>

##### **ZER ERA:**

A circular fashion brand that focuses on sustainability by designing and producing clothing from recycled and organic materials. Its goal is to reduce the textile sector's environmental impact.

Website: <https://zereraofficial.com/>

##### **ZYOSH:**

An innovative company developing sports and leisure clothing that stands out for sustainable design and the use of recycled materials. Its philosophy is based on combining fashion and sustainability.

Website: <https://zyosh.com/>



## 2. Countries involved in the mapping



### | Government

National Law 7/2022 on **waste and contaminated soils for a circular economy** is currently regulating more aspects related to **eco-design, green claims, implementation of economic instruments**, destruction of unsold textiles and encourage repair and reuse practices. The Extended Producer **Responsibility** is still a pending issue that must be developed during 2025.

Some of the Textile companies with more international impact are Spanish (Inditex, Mango, Desigual). The Spanish textile industry and associations are actively working together to develop **RDi projects** to face environmental challenges related to their activity such as textile post-consumer recycling and **water/energy consumption**. Some of the most innovative business models included in this report are **Ecoalf, Antex, Jenealogia, Zer Era, Erum grup, Hilaturas Arnau, etc.**

**Valencian Government** has launched several innovation projects in collaboration with the Technological Institute of Textile, AITEX, concerning **eco-design** (eco-design techniques to the manufacture of highly sustainable textile products) and circular business models (alternative textile waste recovery routes to mechanical shredding processes).

**Government of Catalonia** is promoting the **Catalan Circular Fashion Agreement**, that gathers SMEs and big fashion and textile Catalan companies (such as Mango or Antex) and other major stakeholders (government, clusters, technology centres) to enhance circularity and develop joint projects to increase the sector competitiveness under 3 pillars: collection & sorting, development of local industry for recycling and consumer awareness (<https://mediambient.gencat.cat/ca/detalls/Noticies/20220106-pacte-moda-circular>)

## 2. Countries involved in the mapping



### | Stakeholders

**The Association for Textile Waste Management** promotes the responsible management of textile waste, encouraging reuse and recycling to reduce the sector's environmental impact.

It collaborates with businesses and governments to **develop sustainable initiatives**, such as educational campaigns, collection systems, and support for eco-friendly production research. Additionally, it advocates for policies that promote sustainable practices in the textile industry, contributing to resource conservation and environmental protection.



# III. Conclusions

## Main Topics

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*SMEs are key players in the textile and clothing supply chain, spanning from raw material suppliers to manufacturers, designers, and retailers. Their flexibility enables them to experiment with new materials, technologies, and design concepts, driving the development of innovative products and processes.*

*As a result, SMEs play a crucial role in fostering innovation, diversity, and sustainability within Europe's textile and clothing sector.*

*As highlighted by the data presented in this report, micro and small enterprises make up the majority of the textile and clothing industry. However, due to their size, the transition to a circular and sustainable model presents a significant challenge—not only for these businesses but for the entire sector.*

*The European Commission, through initiatives such as the Enterprise Europe Network, is actively promoting services to strengthen SME resilience and prepare them for future challenges. Nevertheless, a large proportion of SMEs remain unaware of the upcoming changes outlined in the EU Strategy for 2030. Providing them with case studies and real-world examples could serve as a catalyst for their transformation.*

*Accelerating SMEs towards a circular and sustainable business model requires more than just adaptation; it demands a fundamental shift in mindset—one that prioritises resilience and embraces a wider spectrum of possible futures, rather than focusing solely on the most likely outcomes.*





# 3.2 Contacts

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