

# MANIFESTO



Moving decisively together towards a thriving circular textile industry

## **CASE STUDIES: KEY TAKEAWAYS**

In the next pages are the key insights derived from the case studies conducted to inform the extended version of the Circular Textile Days Manifesto.

These interviews were carried out by fashion students with diverse specializations, ranging from psychology to technical design, representing various schools and universities.

The interviewees, who are partners involved in or connected to Circular Textile Days activities, provided their perspectives. The students, referred to as contributors, analysed their circular solutions, identified bottlenecks and challenges, and assessed what is needed to scale viable business models and help shift the textile industry from a linear to a circular system.

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## TEX.TRACER



- While regulations promote transparency and sustainability, they can also create a significant compliance burden.
- There's an opportunity to influence consumer behaviour by educating them on the benefits of sustainable fashion and providing verified data to help them make informed choices.
- A key challenge for circular service providers, specifically in software, is the initial process of collecting accurate supply chain data.
- Leveraging technology to enhance supply chain transparency is essential, with advanced technologies like AI and machine learning playing a crucial role in improving data accuracy, efficiency, and predictive capabilities.
- Collaboration across the supply chain is crucial for addressing circularity challenges, but building partnerships can be difficult when goals or technological systems aren't aligned.

## SPINNING JENNY



- The difficulty in sorting materials complicates the recycling process, and the current regulatory environment doesn't fully support the industry in addressing these challenges. A lack of clear standards for mixed fibres, for instance, makes it hard for companies to recycle certain textiles effectively.
- Consumer acceptance of imperfect products, such as textiles with slight colour variations, could significantly drive the adoption of recycled materials.
- Companies should take a market approach that involves close collaboration with stakeholders across the supply chain, from recyclers to end-product manufacturers, and act as facilitators, helping clients unfamiliar with sustainable practices navigate the complexities of integrating recycled materials.
- The demand for recycled materials is currently lower than the available supply, which limits the market for circular products. However, as awareness and demand increase, more companies are expected to follow suit.

## STUDIO VIVERDIE



- It's challenging for small designers to source sustainable textiles in small quantities.
- Many companies are stuck in their traditional ways. To embrace sustainability, businesses need to be open to new production methods.
- It's important not only for companies but also for customers to be willing to reflect on and change their behaviour.
- Consumers tend to follow trends and will buy what's easily accessible, often without understanding the environmental impact.

# FEDUSTRIA



- New regulatory initiatives for textiles have created a complex maze of requirements.
- Differences between regional, national, and European regulations lead to operational inefficiencies. We need a harmonized regulatory framework that aligns regional, national, and EU-level rules to enable more efficient international collaborations and simplify compliance for businesses across multiple regions.
- Legislative restrictions, such as bans on exporting textile waste, create obstacles for circularity, even though cross-border cooperation could enhance it.
- Partnerships between governments and industry, like those seen in the Nordic countries, have successfully advanced circular economy initiatives.
- There is still much to be done in terms of funding and innovation to support circular systems.
- Public and private funding are needed to support the development of new materials, processes, and business models aligned with circularity principles.
- Investment in advanced recycling technologies capable of handling complex textile blends will increase the feasibility of circular textile practices.
- Eco-friendly alternatives are often more expensive, and consumers choose cheaper, less sustainable products without incentives or motivations to make a change.
- Programs like awareness campaigns, grants, or tax reductions could incentivize consumers to choose sustainable commodities.
- We need stronger ecodesign principles and industry-wide, standardized policies.
- There's a growing demand for workforce training and development in the circular economy.

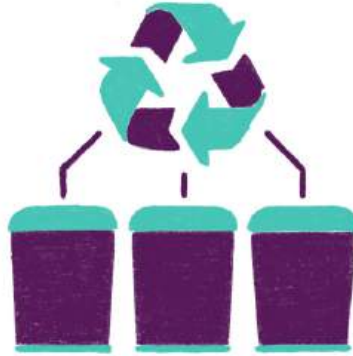
## YKK



- Fashion companies are interested in sustainability and circularity, but as soon as it's clear that it will be 5 or 10% more expensive, they quickly lose interest.
- Producing more sustainably, especially in the fashion industry, is still largely a marketing term. Clothing brands continue to prioritize the lowest possible production costs to offer their products to a large consumer base. They fear their products will become too expensive compared to other brands. Consumers have been given a luxury position, and we've all contributed to creating that.



## VALVAN



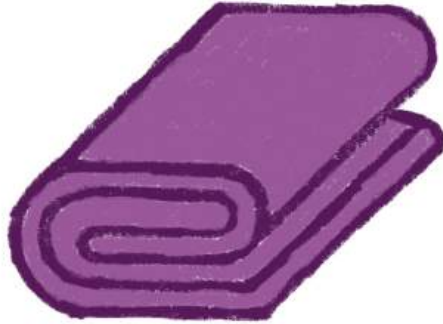
- Circular textile systems face significant barriers, with the biggest being the lack of a competitive market for feedstock, leaving collectors, sorters and recyclers without the financial incentive to sell, as their operating costs aren't covered.
- While the EPR presents an opportunity for the textile industry, the law against exporting textile waste threatens the current business model, as profit from exporting second-quality textiles to Asia, Eastern Europe, and Africa constitutes a crucial part of revenue.
- An EU-level law like EPR looks very different in practice across countries. For example, the Netherlands and Germany have established curbside textile collections, while France didn't have this infrastructure before.
- The key question is how to effectively harmonize European and global infrastructure while still addressing the unique needs and challenges of individual countries.

## SWATCHLOOP



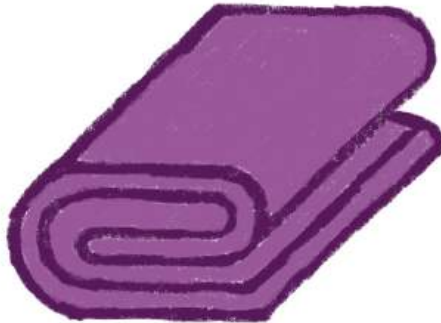
- One significant obstacle is the fast fashion norm, which results in high volumes of low-quality textiles that are difficult to recycle.
- We live in a consumption-driven culture, where a lack of awareness leads to lower participation in buying sustainable clothing.
- Many companies market themselves as sustainable to enhance their reputation, often appearing more environmentally friendly than they actually are. This can discourage consumers from purchasing recycled products due to unreliable claims.
- There is an urgent need for traceable processes and transparency in the fashion industry's waste cycle to build consumer trust and promote sustainable purchasing habits.

# EURAMATERIALS



- The current fashion business model is built on mass production and low costs, making it extremely difficult to produce recycled textiles that are fast, cheap, and scalable.
- It's challenging to stay competitive when products made with recycled content are more expensive than those made with raw materials.
- Although many solutions are being developed and tested, they aren't yet market ready. The future, circular industry requires large volumes of new machines that still face significant restrictions due to being relatively new.
- Since the industry is globalized, scaling recycling efforts also means considering how to transport post-consumer waste to recycling facilities and then to production centres.
- We need to think globally while supporting local industries, balancing the local and global economies as globalization remains central to fashion.
- Strong networks are needed to connect brands with innovators and create more opportunities to scale these recycling processes.
- First, governments must clearly define what constitutes sustainable and circular designs and business models. Only then can they enforce clear laws to address unsustainable production.

## SAXCELL



- Despite ongoing discussions about sustainability, the willingness to pay more for sustainable products remains limited, discouraging producers from fully committing to circularity.
- A major obstacle is the high cost of complying with sustainability requirements, especially when consumers are not yet fully willing to pay more for sustainable products.
- Extended Producer Responsibility (EPR) regulations encourage the use of recycled materials, but the broader regulatory environment makes it difficult to secure investments and scale production due to financial challenges.
- While EU regulations like the EPR program help promote recycling, the overall regulatory landscape still poses challenges for securing investments and scaling production.
- Clearer and more supportive regulations are needed to ensure the economic viability of using recycled materials and to foster long-term collaboration across the supply chain.
- Integrating sustainable practices, like using recycled fibres, requires balancing regulatory compliance with operational efficiency. EPR regulations assist with this but maintaining cost efficiency remains a challenge.
- One of the biggest challenges is finding investors willing to support innovative and sustainable production methods.
- Social sustainability, such as ensuring living wages, is also critical and should be more widely enforced.
- We communicate our circularity goals and compliance efforts through marketing campaigns that highlight the benefits of recycled materials and sustainable production.

## BAWEAR SCORE



- Educating stakeholders on durability, reusability, renewable resources, and waste reduction is essential for sustainable textile practices.
- Companies struggle with acquiring reliable secondary data for environmental impact calculations. Enhancing industry collaboration is crucial to bridge data gaps and improve transparency, especially for new materials (like Roica elastane).
- Knowledge gaps in textile production and lack of incentives hinder accurate environmental impact assessments.
- Unpredictability in consumer behaviour, such as how long they wear an item until they throw it, complicates the calculation of environmental impacts.
- A trade-off between affordability and durability persists, with many consumers prioritizing cost over environmental impact, despite new EU regulations pushing for better transparency and standardization.
- Partnerships with brands and suppliers are vital for collecting real-time data, driving innovation, and increasing transparency, all crucial for advancing sustainability goals.

## QUIFACTUM



- Sustainable products are often more expensive, creating a barrier for many consumers. If consumers were better informed about the true costs and impacts of their purchases—both sustainable and non-sustainable—they could make more educated decisions. This transparency could help sustainable brands compete in the market.
- As Oscar Wilde remarked, “A cynic knows the price of everything but the value of nothing.” There is a need for greater consumer education about the true costs of sustainable and non-sustainable products, as well as support for companies to innovate and reduce the costs associated with circular business models, making sustainable products more competitive.
- It is essential to establish stronger incentives for data sharing, including regulatory mandates and financial rewards for companies that disclose their supply chain information.
- Developing interoperable data standards would facilitate easier collaboration and data exchange across the industry.

## **SIGN THE MANIFESTO!**

We need to take a stand as an industry by endorsing this manifesto together.  
Let's commit to collective action and shared responsibility.

Note: This is not legally binding but will help us amplify the message and guide our efforts.

**"I pledge my support for this manifesto and promise to actively contribute to the transformation of the textile and fashion industry toward a circular system."**

(Upon agreement, please add the following details to the list below)

\_\_\_\_\_ (Name)

\_\_\_\_\_ (Signature)

\_\_\_\_\_ (Date)

## CONTRIBUTORS

The Circular Textile Days team would like to extend its sincere gratitude to the following individuals for their invaluable contributions to this manifesto:

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