How to take the Lead in the Sustainable Textile Transition?

Insights on needs and key development areas for the European textile industry

Lutz Walter, RISE Textile Summit 2024
What is the Textile ETP?

The largest Community of Textile Research & Innovation Professionals in Europe

Objective: ensuring long-term competitiveness of the EU Textile & Clothing Industry through collaborative and market-oriented research & innovation.

- Brussels-based
- Launched as an industry-led initiative in 2004
- Non-profit organisation since 2013
- 4 founder organisations:

  - EURATEX
  - Têtxnet
  - INTEXTRA
  - Neftas

200 associated member organisations from 29 European countries

150+ Masterclass & community subscribers

1500+ connected experts
Our Services

**Networking**
- In-person conferences and workshops
- Webinars and online events
- Members community platform
- E-newsletters
- Social media

**Learning**
- Thematic Innovation Hubs & Communities for Learning and Expert Collaboration
- Think Tank work on research roadmaps, strategies, position papers
- EU project results sharing

**EU Funding Access**
- Advocacy for more EU funding of textile research & innovation
- TEPPIES: Brokerage system to set up EU projects & finding partners Europe-wide
- Lead of new EU partnership Sustainable Textiles of the Future
ETP Services Structure

ETP Membership
Full – associate – networking members
For general networking, strategy & EU funding access

SmartX Innovation Hub
Smart & Technical Textiles
On-going

Circular & Biobased Textiles Innovation Hub
Circular & Biobased Textiles
On-going

Textile Digitalisation
Starting in late 2024

For thematic networking & learning
Innovation Hub for Circular & Biobased Textiles

Where European sustainable textile experts meet
Circular & Biobased Textiles Innovation Hub

A one-stop-shop for sustainable textile innovation

A network of likeminded experts

A hub to explore new collaborations and projects

Learn • Network • Collaborate • Share

Where European sustainable textile experts meet
Textile Sustainability in Action
Understanding and Doing what it takes
Some Sustainability Key Figures

- 115-120 mln tons of textile fibre production, growing 2-3% p.a., 2/3 fossil-based, 1/3 biobased, 50+% used for apparel, growth is ex-EU
- Fashion represents 2-3% of global GHG emissions, growing 1.5 – 2% p.a. (12% from fibres, 63% from production, 25% from use)
- Total EU post-consumer textile waste 11 mln tons (52% technical & home textiles, 48% apparel), 8-9 mln tons incinerated or landfilled
- EU post-consumer apparel waste 5.2 mln tons (11.5 kg per capita), 2+ mln tons separately collected
- 50-60% of separately collected waste is re-used (mostly outside EU), the rest downcycled & incinerated, textile-to-textile recycling is <1%
- Amount of recycled fibre use is very low, only exception is polyester, rPET = 14% of all polyester fibre (all from PET bottle recycling)
The 3 Textile Sustainability Challenges

Defossilise & Biobase Materials & Chemicals
- No fossil primary materials

Renewably Electrify Production Processes
- No fossil energy in production

Digitise & Automate Manufacturing & Supply Chain
- Produce locally, on demand
Drivers of Sustainability Transformation

**Market Drivers**
- Consumer Behaviour
- Resource Costs
- Technology/Innovation

**Policy Drivers**
- Geopolitics
- Regulation
- NGOs & Media
How to master the transition?
Fields of action

- Awareness of change
- Leadership, strategy & finance
- Technology & Innovation
- Customer & Marketing
- Supply Chain
- People & Skills
- Impact
Realise business-as-usual is not an option.

Understand & define what sustainability means for your company.

Embed sustainability at the core of the value system & company culture.

Describe each goal clearly & prioritise.

Communicate priorities clearly.

Monitor legislation.

Collect & analyse relevant data.

Understand & monitor risks.
Sustainability must be *established* from the top, but *implemented* bottom-up

- Long-term committed leadership
- Patient owner capital
- Profitable business model (in-sync with transition)
- Market diversification + focus
- Agile operations, rapid decision making

The Sustainability Manager is not the main responsible for sustainability, the company leadership is.
Technology & Innovation

- Monitor technology & innovation trends
- Develop deep knowledge of materials, processes, products
- Complement it with an external network of knowledge providers
- Fight inefficiency & waste
- Embrace new technology incl. AI
- Make many small experiments – rapidly scale what works

A large technology toolbox is key to solve diverse sustainability problems
- Engage with customers frequently & openly
- Anticipate their needs (know which job do you solve for them?)
- Understand the needs & desires of the end user
- Sustainable innovation doesn’t sell itself – market smartly, educate customers
- Back up every claim you make – don’t greenwash, don’t fool your customers

Happy customers are the foundation of every sustainable business
Supply Chain

- Build trust & win-win partnerships
- Make long-term commitments
- Understand where your materials come from and how they are made
- Build seamless data flows (with minimum human intervention) & do it fast because the DPP is coming soon
- Managed transparency should be the goal

If you play zero-sum games with your suppliers and customers, everybody loses.
○ The most important asset of every company are their people

○ Treat your and your business partners’ people well (golden rule)

○ Sustainability provides purpose = attracts (young) people

○ Train & up-skill continuously (green & digital skills are key)

○ Incentivise people to innovate

The number 1 priority of business leaders is to take good care of their people, so they take good care of their customers.
Impact

- Measure what you can
- Honestly assess progress regularly
- Don’t mistake measures for goals
- Make it as concrete, specific and local as possible
- Celebrate success
- Balance people, planet & profit
Sustainability isn’t Regulatory Compliance
Sustainability is all about QUALITY

8 Dimensions of Quality

- Leadership
- People
- Business Model
- Process
- Product
- Supply Chain
- Local Community
- Customer Service
We tend to overestimate the effect of a technology in the short run and underestimate the effect in the long run.

- Roy Amara

By 2030 the textile industry will not look much different from today

But by 2050 the global textile & fashion industry will:
- process mostly biobased or otherwise renewable and safe materials & chemicals and produces with 100% low-CO$_2$ energy,
- manufacture its products in highly automated digitised factories located close to the point of final consumption.

To get there we need 25 years of relentless innovation & smart investment.
Thank you for your attention