# Post-consumer textile circularity in the Baltic countries

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### **PROJECT BACKGROUND (Estonia)**

Growing amounts of imports and increasing local donations

Decreasing quality of clothes

Lack of sorting, reuse and recycling capacity in the region





### DESTINATIONS OF NORDIC USED TEXTILES IN 2014 (Watson, et al. 2016)

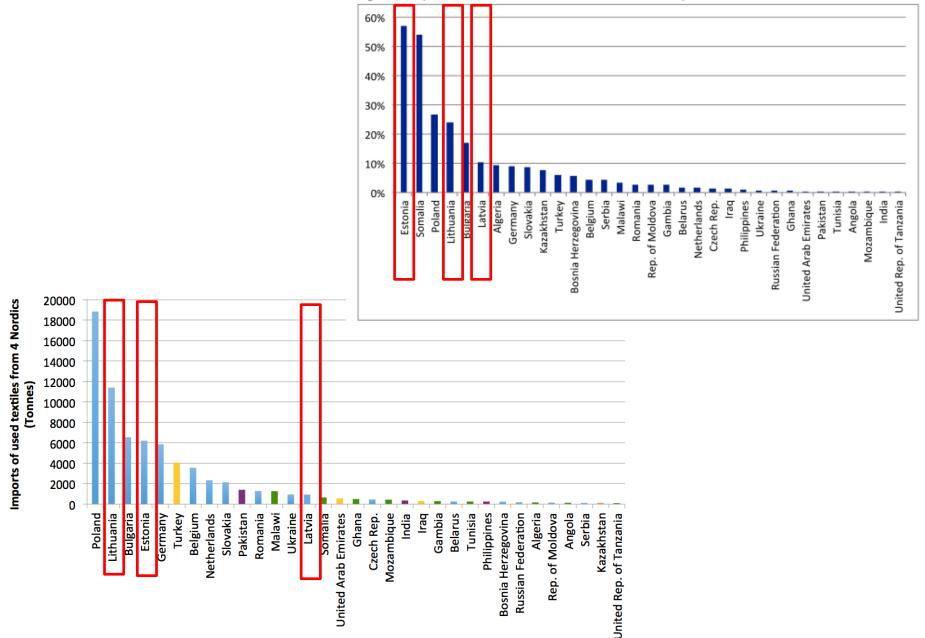


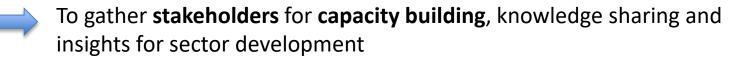
Figure 6: Imports from Nordic countries as share in total imports of worn textiles

### **PROJECT GOAL**



To map **new** and **used textile flows** in the Baltic states

To identify **challenges** and **opportunities** in textile collection, sorting, reuse and recycling



To develop **policy** and **sector development recommendations** for advancement of textile circularity in the Baltic region (incl. preparation of the EU 2025 separate textile collection requirement)



To facilitate and strengthen **knowledge exchange** and **collaboration between actors in Baltic and Nordic** countries in the value chain of used textiles

### **NORDIC KNOW-HOW**



The Nordic textile commitment

A proposal of a common quality requirement system for textile collection, sorting, reuse and recycling

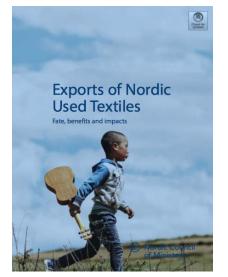


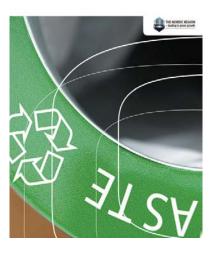


THE NORDIC REGION

🕗 norden

Towards a Nordic textile strategy Collection, sorting, reuse and recycling of textiles





#### 🕑 norden

EPR-systems and new business models Part II: Policy packages to increase reuse and recycling of textiles in the Nordic region



#### O norden

EPR systems and new business models Reuse and recycling of textiles in the Nordic region



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Prevention of Textile Waste Material flows of textiles in three Nordic countries and suggestions on policy instruments





## Mapping of textile flows

### Wished for result

Annual consumption of new textiles plus trade in used textiles



Separate collection and treatment of textiles from households and challenges

Treatment of imported used textiles

Annual consumption of used textiles



Method

Eurostat import/export and production data and conversion tables

Survey of charities, commercial collectors, municipal waste companies and interpolation

Surveys of wholesalers/sorting companies and interpolation

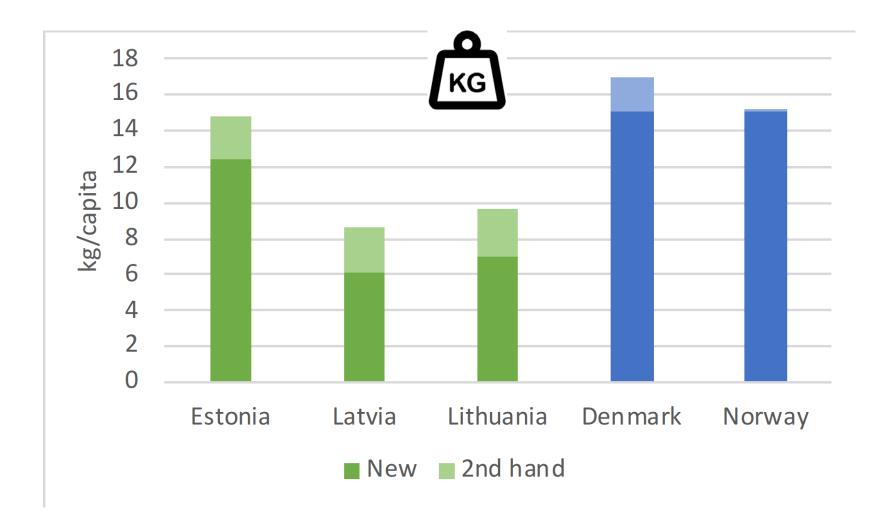
Output from 2 and 3 above



### **Consumption of clothing and household textiles (2018)**



### **Consumption compared to Nordics**



#### **Consumption patterns have potential for sustainability:**

- **Consumption of new clothing is low** in Latvia and Lithuania (but is growing rapidly!)
- Clothing is used more intensely before being discarded not such throwaway societies as Nordics (but fast fashion taking hold)
- **Consumption of second-hand is high:** 1/3 of total consumption in Latvia and Lithuania, 1/6 in Estonia

TEKSTILE

"DÉVÉTA TEKSTILÉ" (IK supakusti j potetleninus malaus motoriliki, vyriliki vakiški ritaki, porne avaryne, potulyne, antilodes, uhuclastan, žavdari)

Šis konteineris skirtas tik tekstilei! Draudžiama mesti šiukšles!

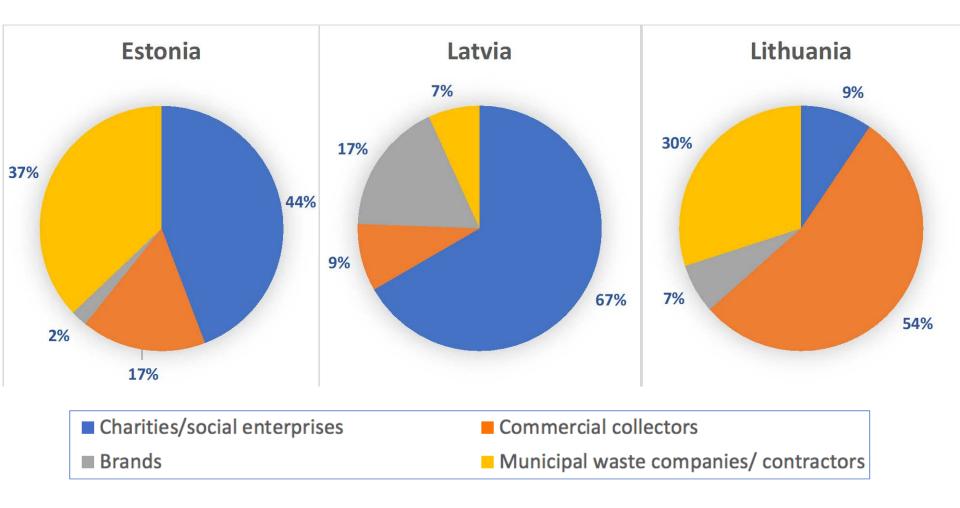
### **Collection of used textiles**

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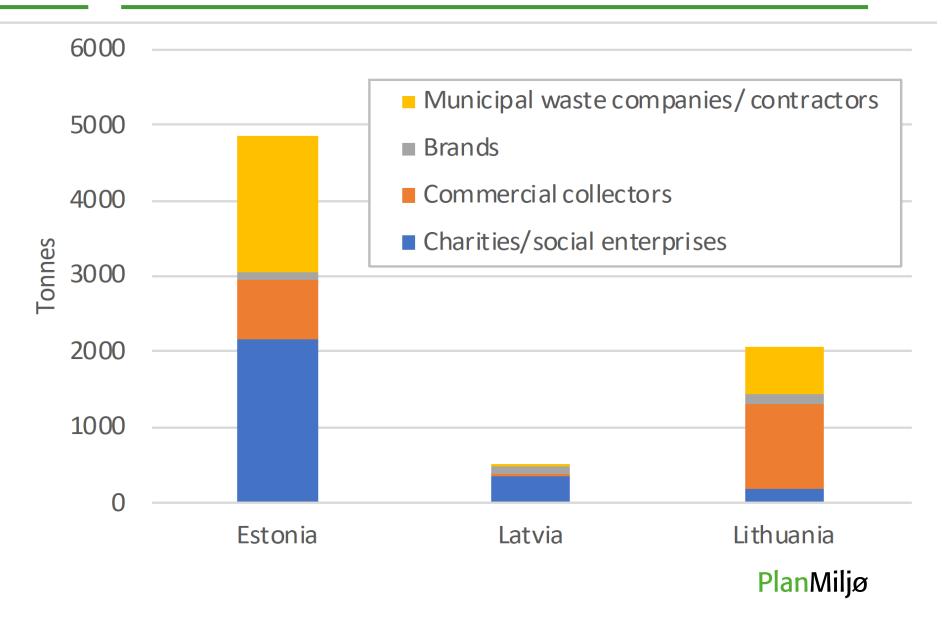


GARMENT

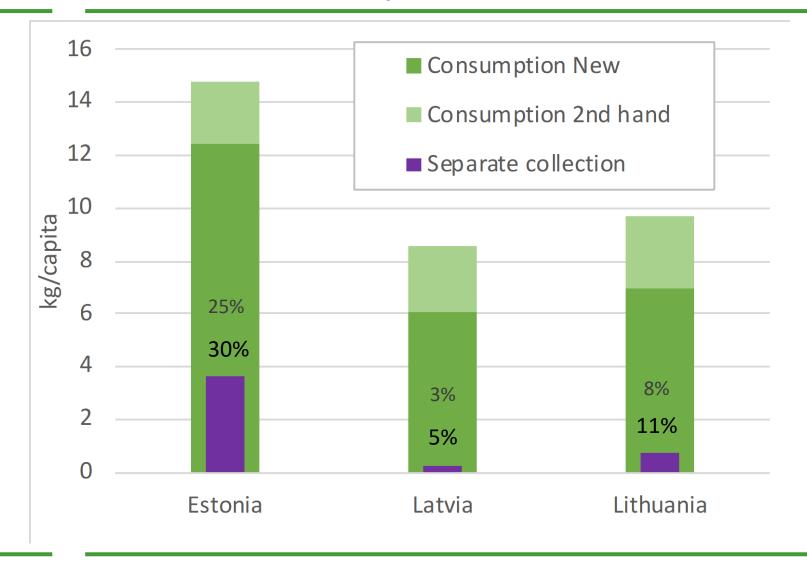
### Who's collecting?



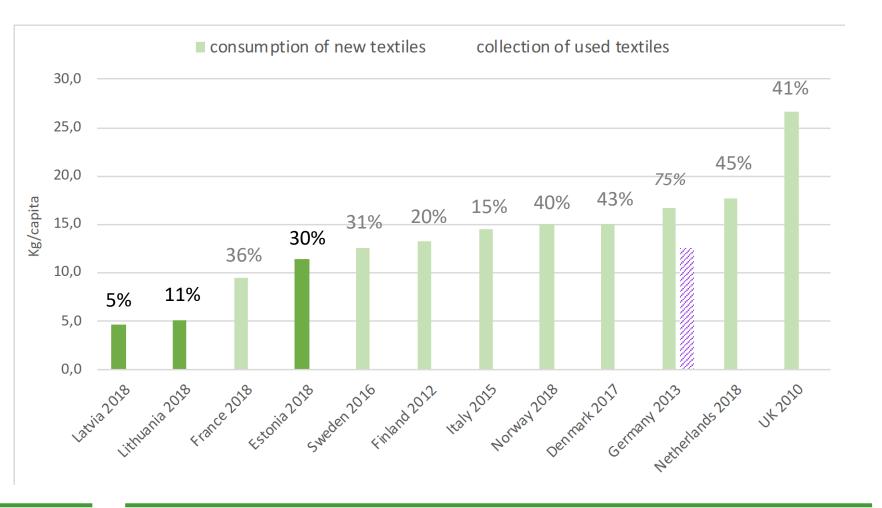
### How much do they collect?



### What share is this of textiles placed on market?

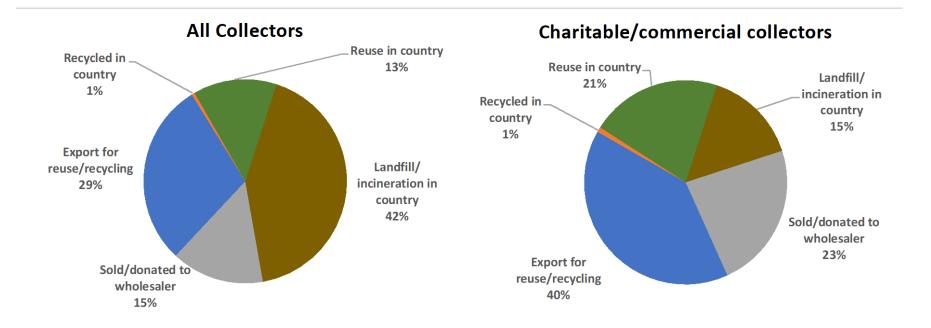


### How does this compare to other countries?

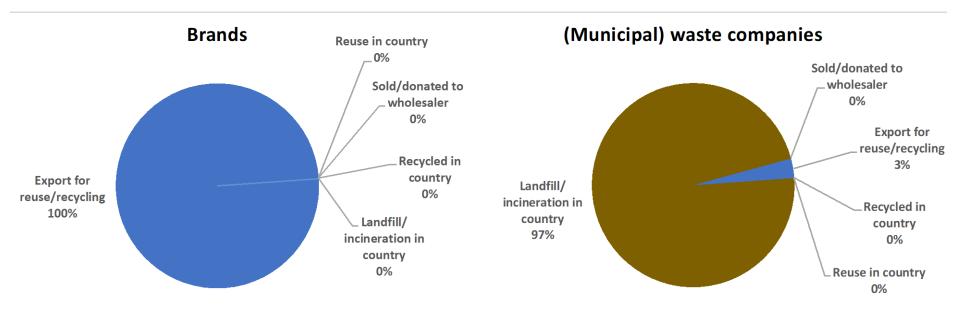


### Treatment of separately collected textiles

### **Treatment of separately collected textiles**



### **Treatment of separately collected textiles**



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### **Domestic collection and treatment of used textiles struggling:**

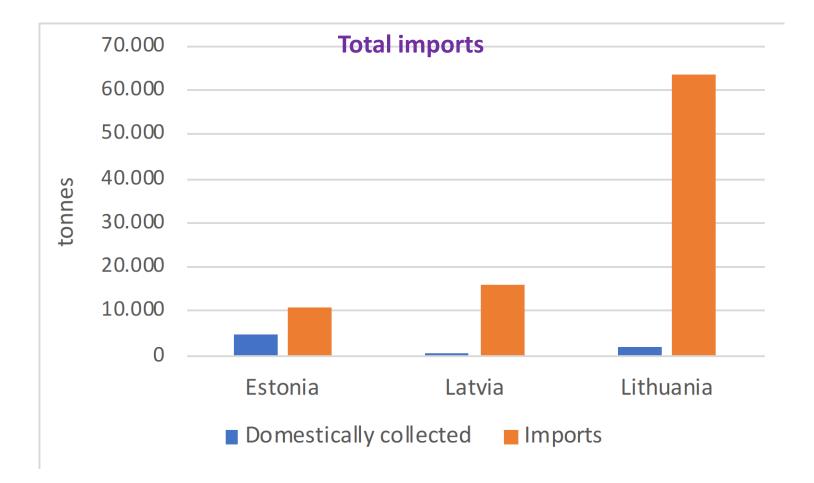
- **Collection rates are low** (but increasing) in Latvia and Lithuania: majority of textiles end in mixed waste mostly in landfill
- Quality and value of collected textiles low and falling fast fashion?
- **Relatively low reuse rates** of collected textiles around 40-45%
- Can't compete with quality of imported used textiles
- Very few local recycling options especially in Latvia and Estonia
- **High share (42%)** disposed to landfill/incineration including almost all textiles collected by waste companies
- No cooperation between charities/commercial collectors and waste companies in Latvia or Lithuania
- Economic viability of collectors challenged especially in rural areas
  - even more so by 2025!

### The wholesale sector

XEL ...

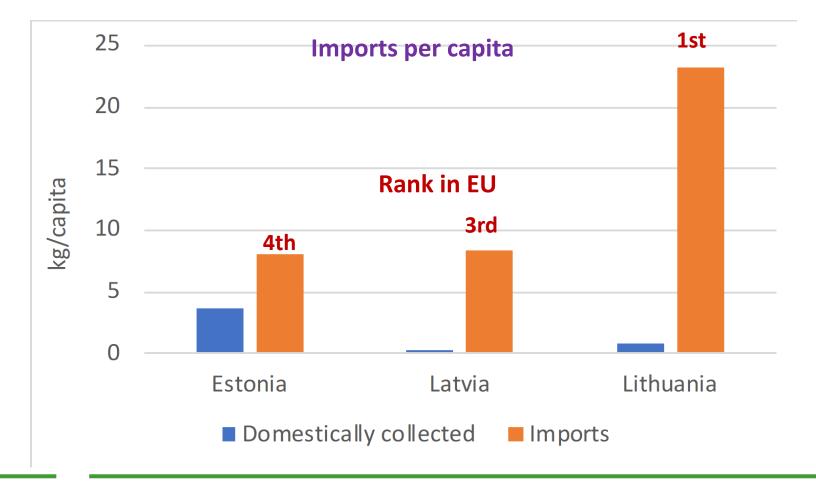
### What quantities of used textiles do the Baltics import

(and how does it compare to separate collection)?

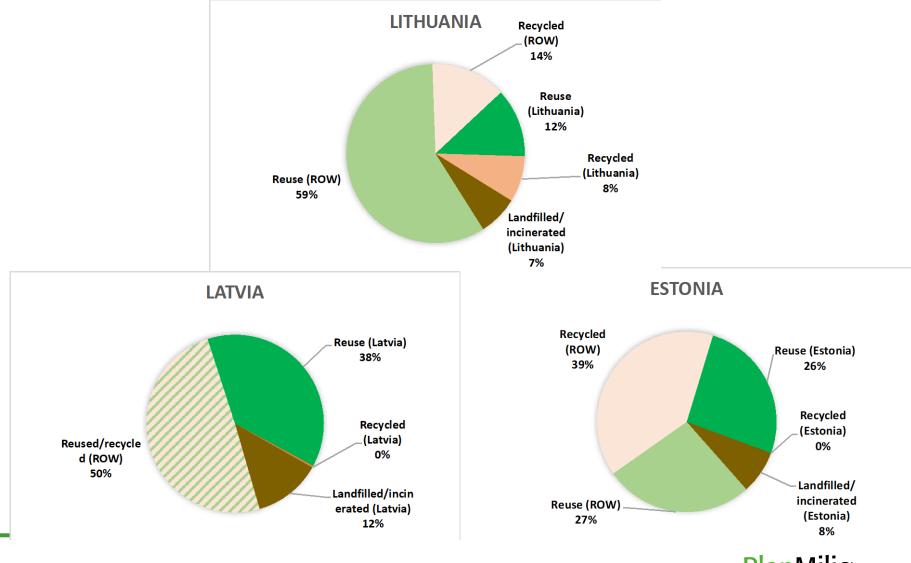


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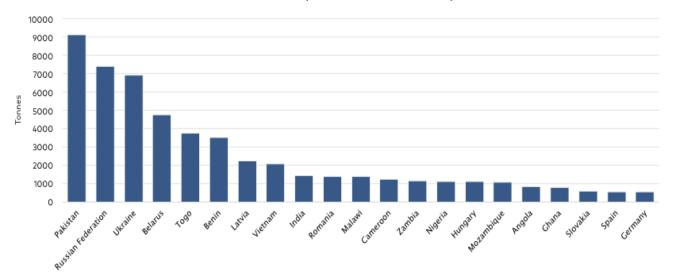


### What happens to imported used textiles?



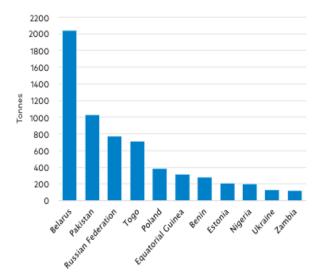
#### Where do the exported textiles end up?

Lithuania (receivers over 500 tonnes)

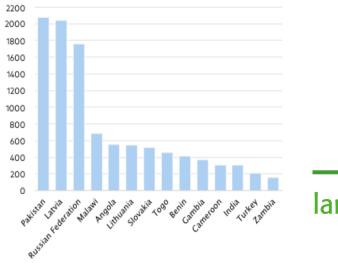


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Latvia (receivers over 100 tonnes)



Estonia (receivers over 100 tonnes)



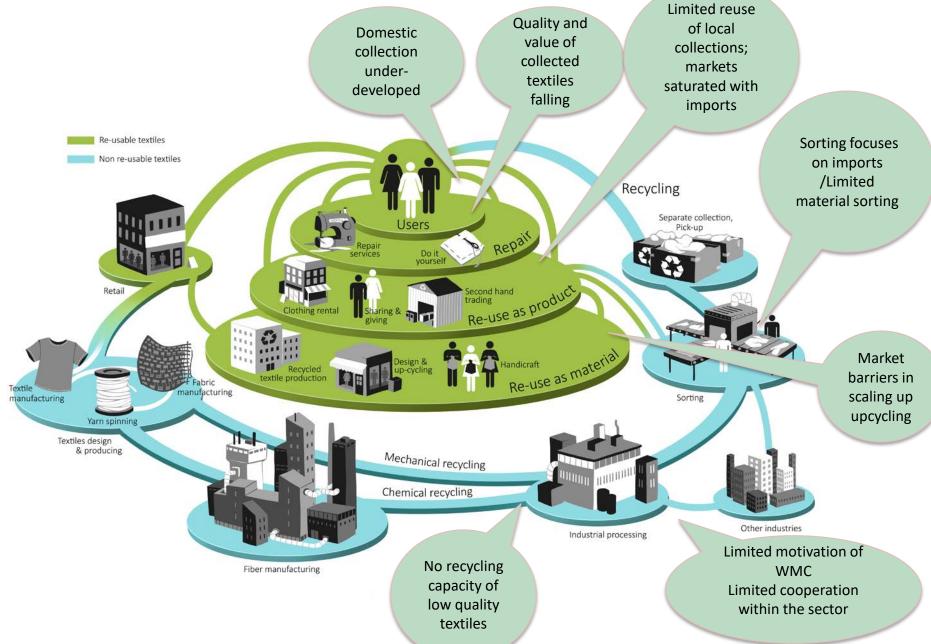


# Wholesale sector offer challenges and opportunities:

- **3 out of 4 largest importers** *per capita* of used textiles in EU
- Baltics provide **circular economy services** to Nordics
- Sector generates **2000 4000 jobs** in the region
- **18% of imports sold 2<sup>nd</sup> hand** within Baltics
- Generates 17 000 tonnes of textile waste for recycling but 12 000 tonnes exported for recycling elsewhere
- Further 7 000 tonnes of textiles waste are landfilled or incinerated

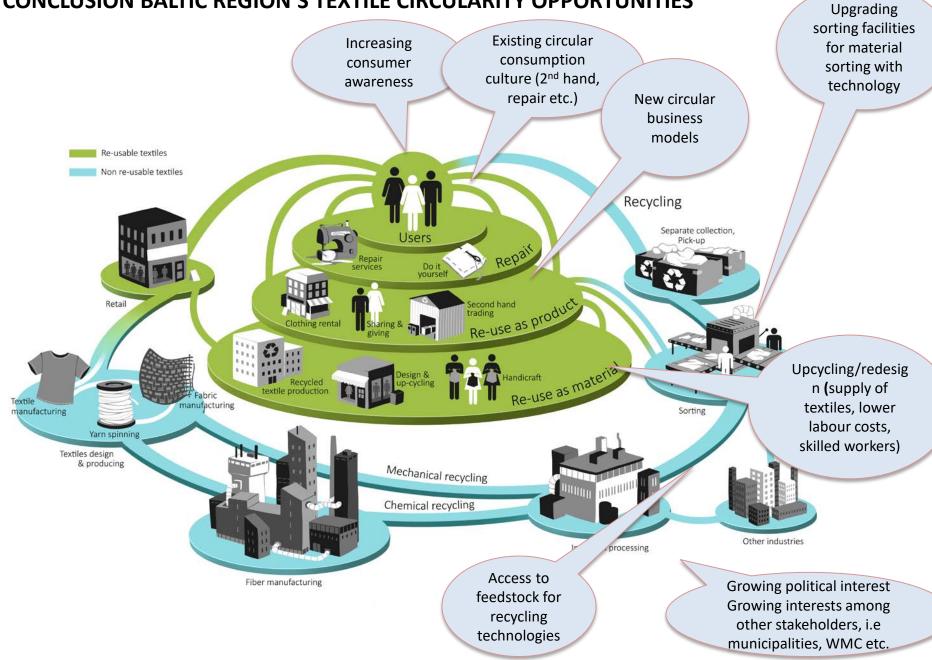
## Reflections

#### **CONCLUSION: BALTIC REGION'S TEXTILE CIRCULARITY CHALLENGES**



Source: Model for Circular business eco-system for clothes by Fontell & Heikkilä, 2017

#### **CONCLUSION BALTIC REGION'S TEXTILE CIRCULARITY OPPORTUNITIES**



Source: Model for Circular business eco-system for clothes by Fontell & Heikkilä, 2017

### **NEXT STEPS**

Clear policy goals with supporting measures & preparation for 2025

R&D/further studies (e.g. feasibility of automated sorting & recycling; EPR models; consumer insights; circular reuse business models)

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Nordic-Baltic stakeholder engagement, knowledge transfer and collaboration building

**PROJECT WEBSITE**<u>https://www.sei.org/projects-and-tools/projects/towards-a-nordic-baltic-circular-textile-system/</u>

REPORT AVAILABLE AT: https://pub.norden.org/temanord2020-526/#

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### **THANK YOU!**

Q&A