white cycle

STRATEGIC INTELLIGENCE BULLETIN N°12

Impact of the latest regulations on the textile value chain

December 2025

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News & EU regulations

EU Parliament approves new rules on textile waste, emphasizing sustainability, producer responsibility and the circular economy under revised EU Waste Framework Directive

From late 2025, the EU adopts amendments to the Waste Framework Directive that introduce a dedicated extended producer responsibility (EPR) scheme for textiles, making producers financially responsible for the costs of separate collection, sorting, preparation for reuse and recycling. The new rules foresee producer responsibility organizations, eco-modulated fees that reward more sustainable and recyclable products, and staged deadlines for Member States to transpose and fully implement the scheme through the second half of the 2020s. These obligations are designed to support a rapid scale-up of fiber-to-fiber recycling capacity and to move a large share of textile waste away from landfill and incineration.

More information here

EU Strategy for Sustainable and Circular Textiles and separate collection

The EU Strategy for Sustainable and Circular Textiles sets the broader policy frame, aiming to make textile products more durable, repairable, reusable and recyclable, with lower environmental and social impacts across their life cycle. Under this strategy and existing waste legislation, Member States must ensure separate collection of textile waste, with EPR fees expected to help finance the required infrastructure and to support higher-quality sorting for reuse and recycling. The strategy also anticipates future product-level rules on recyclability, minimum recycled content and reduced microplastic release, which will directly affect design choices for textiles sold on the EU market.

More information here

France's 49 million euro support package for textile recycling

France announces a support package of about 49 million euros in 2025 to stabilize and expand textile waste collection and recycling, responding to warnings from operators that low compensation rates and weak second-hand markets threaten the existing system. The measure increases payments per tonne of managed textile waste, helping maintain collection networks and sorting centers while new investments in recycling capacity are planned. This aid complements France's existing textile EPR scheme and emerging policies against ultra-fast fashion, positioning the country as one of the front-runners in building a circular textile economy under the new EU framework.

More information here

Techtextil India 2025 and industry focus on recycling technologies

In August 2025, announcements around Techtextil India highlight a strong focus on textile recycling and circular technologies, including the creation of a "ReCycle Zone" at the November 2025 fair. This dedicated area is set to showcase solutions for collecting and recycling waste from garments,

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agro-textiles and medical textiles, along with machinery, traceability tools and innovations for fiber recovery and regeneration. The fair's programming reflects growing demand in India and globally for industrial-scale technologies that can convert textile waste into new fibers and materials suitable for high-value applications.

More information here

Loop Industries' "Twist" circular polyester from textile waste

Loop Industries announces the launch of "Twist", a circular polyester resin produced entirely from textile waste using chemical depolymerization technology that breaks down polyester into its monomers and repolymerizes it to virgin-like quality. The resin is designed to be compatible with existing spinning and textile manufacturing infrastructure, offering brands a route to high-purity recycled polyester that can reduce reliance on fossil-based feedstocks. By targeting emissions reductions and recycled-content goals, this product aims to meet both regulatory expectations and voluntary sustainability commitments in the apparel sector.

More information here

Circular Fashion Partnership: Türkiye

In December 2025, Global Fashion Agenda launches the "Circular Fashion Partnership: Türkiye", a multi-stakeholder initiative to build structured textile-waste systems in one of the world's key garment manufacturing hubs. The program focuses on in-factory waste management, digital traceability of materials and matchmaking between manufacturers, recyclers and brands so that cutting scraps and other textile waste streams can be diverted into recycling rather than disposal. Backed by philanthropic support and international partners, the initiative is planned to start operational activities in early 2026 and is intended as a model for scaling circular systems in other production countries.

More information here

European project converting 24 tonnes of textile waste into garments

A European demonstration project reported in 2025 shows that 24 tonnes of textile waste can be transformed into nearly 50,000 garments through a fully regional value chain, from collection and sorting to recycling, yarn production and garment manufacturing. The project involves multiple partners across Europe and proves that textile-to-textile recycling can deliver commercially viable products, provided that logistics, quality control and design for recyclability are coordinated. Its results are used to argue for further investment in sorting and recycling infrastructure and to illustrate how EPR-funded systems could support such circular value chains at much larger scale.

More information here

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Focus of the startegic bulletin n°12 : Impact of the latest regulations on the textile value chain

The new Corporate Sustainability Reporting Directive (CSRD) mandates that textile companies disclose their environmental, social, and governance (ESG) performance, significantly impacting how they report on recycling practices and sustainability efforts. Complementing this, the AGEC Law promotes recycling and waste reduction in the textile sector, establishing essential guidelines for compliance. Furthermore, the Extended Producer Responsibility (EPR) scheme holds manufacturers accountable for the lifecycle of their products, incentivizing the design of sustainable textiles and effective recycling systems. Similarly, Individual Producer Responsibility (ISPR) encourages companies to take ownership of their products' waste, fostering a culture of accountability in recycling. Together, these frameworks support a transition towards a circular economy in the textile industry, aiming to minimize waste and enhance resource efficiency. This integrated approach not only aligns with regulatory requirements but also promotes sustainable practices within the industry.

The CSRD directive, AGEC Law, ISPR, and EPR scheme significantly influence technological development, processing, and business models in textile recycling by promoting sustainability and circularity. These regulations encourage the adoption of innovative recycling technologies and sustainable business practices, aiming to reduce environmental impact and enhance resource efficiency in the textile industry. The transition to circular business models is facilitated by these legislative frameworks, which emphasize waste minimization and sustainable practices. This shift is crucial for the textile industry to adapt to evolving regulatory landscapes and consumer expectations.

Technological Development

- The regulations drive advancements in recycling technologies, such as mechanical and chemical recycling, which are essential for processing complex textile compositions like polyester and cotton blends (Wang & Salmon, 2022).
- Innovations in sorting and separation technologies, including spectroscopic methods, enhance the efficiency of recycling processes by accurately categorizing textile waste based on chemical composition (Wang & Salmon, 2022).
- The development of sustainable composite fibers from textile waste is encouraged, utilizing used clothing as a raw material source, which reduces reliance on natural resources (Putra et al., 2024).

Processing Improvements

- The regulations promote the use of advanced materials like biopolymers and biocomposites, which are more environmentally friendly and support circular design strategies (Osei & Ademtsu, 2024).
- Processes such as decolorization and conversion of textile waste into valuable raw materials are emphasized, facilitating the recovery and reuse of textiles in a closed-loop system (Wang & Salmon, 2022).

Business Model Transformation

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- The shift towards circular business models is supported by the regulatory frameworks, which encourage stakeholder collaboration, capacity-building, and consumer awareness campaigns (Osei & Ademtsu, 2024).
- The EPR scheme and similar regulations incentivize producers to take responsibility for the entire lifecycle of their products, promoting sustainable practices and reducing waste (Batool & Nawab, 2023).

While these regulations foster technological and business model innovations, challenges remain, such as the need for political support, value chain transparency, and overcoming power structures within global value chains (Stadler et al., 2025). Addressing these barriers is essential for the successful implementation of sustainable practices in the textile industry.

Impact of the CSRD on the textile industry

The Corporate Sustainability Reporting Directive (CSRD) is poised to significantly influence technological development, processing, and business models in textile recycling. By mandating transparency and sustainability in corporate practices, the CSRD encourages innovation and collaboration across the textile value chain, fostering a shift towards circular economy principles.

Technological Development

- Innovative Recycling Technologies: Advances in mechanical and chemical recycling processes are being prioritized, with a focus on bio-based materials and thermochemical methods that enhance sustainability (Osei & Ademtsu, 2024).
- Blockchain for Traceability: The integration of blockchain technology is emerging as a solution for improving traceability in textile recycling, ensuring compliance with sustainability standards (Osei & Ademtsu, 2024).

Processing Improvements

- Enhanced Waste Management: The CSRD promotes better collection and sorting of textile waste, addressing fragmentation in current recycling processes (Saif et al., 2024).
- Automatic Sorting Facilities: Development of automated sorting plants is being proposed to streamline recycling operations and improve efficiency (Niebler, 2020).

Business Model Transformation

- Circular Business Models: New business models are being developed, such as platforms for collaboration among sorters, recyclers, and designers, which are essential for a circular economy (Niebler, 2020).
- Regulatory Compliance: Companies are adapting their business strategies to meet the requirements of various regulations, including the EU's Sustainable and Circular Textiles Strategy, which emphasizes waste minimization and sustainable practices (Batool & Nawab, 2023).

While the CSRD presents opportunities for innovation and sustainability, challenges remain, such as the need for significant investment in new technologies and the potential resistance from established

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practices within the industry. Addressing these barriers will be crucial for realizing the full potential of the directive in transforming textile recycling.

ISPR (Individual Producer Responsibility) and its impact on the textile value chain: a 2025 perspective

ISPR refers to Individual Producer Responsibility, a specific implementation of EPR (Extended Producer Responsibility) schemes that hold individual producers accountable for textile waste management. These policies, increasingly adopted in the EU from 2025 onward, mandate producers to cover costs for collection, sorting, and recycling, driving up separate collection rates to meet mandatory targets while addressing the 12.6 million tonnes of annual EU textile waste.[1]

The revised EU Waste Framework Directive, entering force in October 2025, enforces EPR for textiles alongside mandatory separate collection from January 2025, exempting social economy enterprises from fees to boost reuse. This alignment aims to retroactively reimburse municipalities and harmonize rules, with countries like the Netherlands and Latvia advancing full implementation by late 2025.[2], **Erreur ! Source du renvoi introuvable.**

EPR boosts recycling by funding sorting and high-quality recovery, potentially lifting reuse/recovery from Europe's 8% average to targets like France's 60%, while curbing fast fashion overproduction. Textile industries must adopt ecodesign, digital tracking, and recycled content, facing fees modulated by product sustainability.[3], [4]

These schemes spur R&D in AI sorting, fiber-to-fiber recycling, and closed-loop systems, with 2025 reports highlighting investments in disassembly and microfiber reduction. Businesses pivot to take-back models, multi-brand platforms, and revenue from circular services, fostering global transparency via producer declarations.[5]

Impact of France's AGEC Law on Textile Recycling and Industrial Practices

France's AGEC Law, enacted in 2020, mandates separate sorting and recycling of professional textile waste starting January 1, 2025, covering industries, artisans, and logistics sectors with materials including cotton, wool, polyester synthetics, and floor coverings. It strengthens Extended Producer Responsibility (EPR) through the eco-organism Refashion, which manages producer fees and enforces strict recycling quotas: 70% recovery for non-reusable textiles in 2024 (increasing to 80% by 2027), 50% for synthetic-heavy items in 2025 (rising to 90% by 2027), and bans on unsold stock destruction since 2022. [6,7,8]

1https://www.ecomondo.com/en/news-detail/epr-in-europe-extended-producer-responsibility-for-textiles-from-2025?newsId=2651780
2 https://ccre-cemr.org/impactgoal-climate/sustainable-textile-waste-management
[3] https://www.oecd.org/content/dam/oecd/en/publications/reports/2024/12/extended-producer-responsibility-in-the-garments-sector_3a2dec33/8ee5adb2-en.pdf
[4] https://zerowasteeurope.eu/wp-content/uploads/2025/12/zwe_Dec25_transposing-textiles-EPR_report.pdf
[5] https://environment.ec.europa.eu/news/revised-waste-framework-directive-enters-force-2025-10-16_en
6 https://www.artstockasso.fr/2025/02/10/loi-agec-2025-le-tri-des-dechets-textiles-professionnels-devient-une-obligation/
7 https://cobic.fr/blog/loi-agec-n17
8 https://www.usetappr.com/regulation/loi-agec

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The law significantly enhances textile circularity by requiring source separation to improve sorting quality, diverting waste from landfills and incineration toward high-value reuse, upcycling, and fiber-to-fiber recycling processes. It introduces mandatory eco-scores and environmental labeling for large companies (turnover over €10M or producing more than 10,000 units annually) from 2025, incentivizing designs with recycled content and durability to lower EPR fees via eco-modulation. This aligns with EU directives, potentially boosting France's reuse/recycling rates from current levels toward 60%+ targets, while addressing microfiber pollution through dedicated filtration mandates. [9, 10,11]

Firms report challenges in compliance, like source sorting and tracking, but opportunities in eco-design and value creation via upcycling. Brands leverage Refashion for REP, noting costs offset by innovation in durable, recyclable products and microfiber reduction mandates. Overall, feedback highlights accelerated transition to circular models amid 2025's intensified obligations.[12,13,14,15,16]

9 https://crystalchain.io/blog/loi-agec-maj-2025
10 https://pandofashion.com/loi-agec-ou-en-sommes-nous-en-2025/
11 https://globalclimateinitiatives.com/en/loi-agec-2025-obligations-et-impacts-pour-leconomie-circulaire/
12 https://www.losanje.com/blog/loi-agec-upcycling-textile
13 https://www.ecologie.gouv.fr/politiques-publiques/produits-textiles-tlc
14 https://www.hellocarbo.com/blog/reduire/loi-agec/
15 https://pro.refashion.fr/metteur-en-marche/tout-comprendre-sur-la-loi-agec-dans-la-filiere-textiles-et-chaussures
16 https://pro.refashion.fr/en/news/reglementation/what-does-it-mean-to-register-with-refashion

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Scientific publications

Enhancing the Circular Economy in Textile Fiber Waste Recycling - Volume 7, article number 33, (2025) – Springer Nature

Keywords: Circular Economy, Textile, Fiber, recycled fibers

Abstract:
An increasing understanding of the important steps associated with the textile fiber life cycle is useful for improved collaborative work. In the world of more than 8 billion people, the fiber market component using recycled fiber is 1%, showing the need to improve fiber waste recycling by every sector of the materials and textile processing chain. It showed that the textile industry and the commercial and public sectors are still far off in controlling waste elimination through recycling. Presently, the studies available address one of the several aspects of textile waste generation and a possible solution. An overall understanding of each section in textile processing, its waste type, and recycling is useful for better recycling work. Therefore, it is important to provide a comprehensive understanding to the industry, the commercial sector, and the researchers on textile waste generation and all the possible solutions to enhance the collaborative interest in eliminating textile wastes. This study provides the important segment associated with fiber waste production and fiber recycling, with the real areas that can enhance the recycling. Material flow and uncertainties, waste sorting, fiber separation, and recycling using an appropriate method, followed by an economic assessment are all significant steps demanding expert participation to produce practicable fiber waste recycling. Possibly, a single comprehensive presentation of all the main facets associated with fiber recycling may improve understanding among stakeholders to identify the working areas for collaboration. Studies that emphasized collaborative participation in the circular economy across the textile processing stages are introduced. The metrics are determined to assist the shift from linear to circular economy using the increased process chain understanding and the participation of stakeholders. Strengths and weaknesses of recycling methods and the important functional reasons that cause fashion wastes and missing links from material to product are discussed. This study therefore enhances the understanding of stakeholders in fiber waste recycling to encourage the greater content of recycled fibers in the textile product market.

More information here.

Sustainable and Circular Practices in the UK Fashion and Textile Industry - Connor-Crabb, A. , Bulman, S., Bunyan, C. et al. (2025) - University of the Arts London and University of Leeds

Keywords: UK, SME and large scale business, interviews

Abstract:

This report builds on previous research (Hemingray et al, 2023) to further explore how UK fashion and textile companies are developing sustainable and circular practices, including their response to regulatory change associated with green growth and the transition to net zero.

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Qualitative evidence was obtained via in-depth interviews with senior UK SME and large scale business representatives, including PLCs within the UK fashion and textile sector, with questions informed by insights gained in the previous report. Where appropriate, information gathered from previous interviews has been included, and reference is made to company reports and additional data sources.

More information here.

Gendered threads: Policy barriers to sustainable textiles lifecycles. Proceedings of the 6th Product Lifetimes and the Environment Conference (PLATE2025), Ferrero-Regis, T., & Pushpamali, C. N. N. (2025). (6) 10280

Keywords: Fashion, Textiles, Australia and Queensland, Gender, Policy

Abstract:

This research into global and Australian policy in textile circularity focusses on Queensland as a case study. Queensland is still lacking a comprehensive roadmap to textile circularity and does not have a strategy for used clothing collection. These activities are left to charities, which benefit from tax breaks, and industry, which is heavily subsidized with public money, ignoring the reality of an industry that is made of micro and small businesses and is predominantly female. Policies that are not scrutinized through a gender lens could continue to create gender disparities, inequalities and systemic barriers, leaving behind women who want to enter the formal repair economy.

More information here.

The Current State-of-the-Art of the Processes Involved in the Chemical Recycling of Textile Waste, Molecules 2025, 30(2), 299, Featured Reviews in Organic Chemistry 2024

Keywords: chemical recycling*;* depolymerisation*;* PET*;* nylon*;* elastane*;* textiles

Abstract:

The textile industry's rapid growth and reliance on synthetic fibres have generated significant environmental pollution, highlighting the urgent need for sustainable waste management practices. Chemical recycling offers a promising pathway to reduce textile waste by converting used fibres into valuable raw materials, yet technical challenges remain due to the complex compositions of textile waste, such as dyes, additives, and blended fabrics.

More information here.

A systematic review on circular economy practices in the textile industries- Sharma, R., Yadav, V., Gaur, T.S. et al. Discov Appl Sci 7, 1153 (2025).

Keywords : Circular economy*,* Systematic literature review*,* Policies and regulations*,* Recycling*,* Waste management*,* Textile waste

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Abstract:
The textile industry is the largest sector globally. However, it is also the most polluted sector due to the large amount of textile waste and wastewater. The Circular Economy (CE) can play a crucial role in reducing waste. Developed and developing economies are implementing and developing CE practices for waste management. The current study aims to explore CE practices that could be implemented globally. To achieve the study's aim, a Systematic Literature Review (SLR) was employed. Through SLR and based on 54 selected articles, 35 CE practices were identified and categorised into seven major groups. The study's findings show that using recycled materials in the production of textile products is the most popular strategy, as it was primarily cited. It also highlights the need for integrated collaboration among supply chain stakeholders, including the government, manufacturers, consumers, and recyclers. The government could implement policies that encourage manufacturers to adopt sustainable practices, such as eco-designing products. Manufacturers can utilise sustainable materials in their production processes. Recyclers could adopt efficient sorting, segregation, and recycling technologies to enhance their operations. The current study offers valuable insights for practitioners and policymakers, providing a range of strategies and policy recommendations.

More information here.

Polyethylene Terephthalate (PET) Recycling: Gamma irradiation impact on crystallinity, chemical structure and thermal stability, Zaharuddin, I.M., Zaid, M.H.M., Harun, M.H. et al. Appl. Phys. A 131, 171 (2025).

Keywords : polyethylene terephthalate (PET), recycling, Gamma irradiation, breakdown of ester linkages

Abstract:

This study explores the effects of Cobalt-60 gamma irradiation at underexplored low-doses of 0, 20, and 80 kGy on the crystallinity, chemical structure, and thermal stability of waste polyethylene terephthalate (PET). Characterization techniques, including XRD, Raman spectroscopy, DSC, and TGA, revealed that gamma irradiation modify crystallinity and thermal stability, but overall chemical characteristic is unchanging. At 20 kGy, the crystallite size increased from 59 Å to 63 Å, the melting temperature ™ rose from 246.2 °C to 248.4 °C, and thermal degradation and decomposition occurred 25 °C slower. XPS data showed significant chemical restructuring, with an increase in the C/O ratio from 2.89 to 4.53, indicating the breakdown of ester linkages. These findings demonstrate that optimized gamma irradiation can potentially serve as a viable pre-treatment method to improve PET recyclability, enhance crystallinity, thermal stability, and reduce energy consumption and byproduct formation in chemical recycling processes, highlighting its potential for sustainable PET waste management.

More information here.

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Events

PETCORE EUROPE Conference - 5/6 February 2026, Rome Italy

This in-person conference will showcase the PET value chain successes and challenges as it shifts from a linear to a circular model & will provide a unique networking opportunity! The industry will present ongoing actions and join discussions with policy makers to share knowledge and encourage the EU Institutions to swi ftly develop useful & clear regulations. The two-day conference will feature high-level interventions from EU representatives and the business community, touching on a wide range of aspects focusing circularity: the PET value chain: market trends & evolutions, Impact of regulatory & legislative developments, industry Views, PETCORE advocacy & communication activities. Shaping the future: standardisation & certification, technical updates from PETCORE EUROPE's WGs, Innovation updates, Evolution of recycling technologies & many other exciting updates!

More information here

Sustainable plastics - 15/16 April 2026, Frankfurt Germany

Welcome to Sustainable Plastics Europe 2026, the leading trade show for showcasing the latest advances in bio-based and recyclable plastics. Throughout the event, industry leaders will present innovations in materials, packaging and manufacturing technologies to combat global plastic pollution. In response to growing environmental demands, the plastics industry faces challenges such as reducing single-use plastics and improving recyclability. Sustainable materials and new production techniques will be shared as solutions that support regulations and promote a circular economy. Join us to explore strategies, meet leading innovators, and contribute to the future of sustainable plastics.

More information here

Waste Management Europe - 19/21 May, Bologne Italie

Rapidly scaling up as the premier international platform for the entire waste management, recycling, and circular economy value chain. Coming up for three days for the 5th edition, Waste Management Europe will once again gather policymakers, industry leaders, startups, investors, and institutions, creating an ecosystem of collaboration and innovation to tackle some of the world's greatest environmental challenges.

From cutting-edge recycling technologies to large-scale waste management and waste-to-energy projects, WME 2026 accelerates positive change, fosters strategic partnerships, and showcases groundbreaking solutions shaping the future of sustainable resource management.

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More information here

9th Multidisciplinary symposium on circular economy and urban mining - 20/22 May, Naples Italy

After the outstanding success of the 2025 edition, we are pleased to announce SUM 2026 – 9th Multidisciplinary Symposium on Ci rcular Economy and Urban Mining, which will take place from 20 to 22 May 2026 in the stunning island of Procida, Italy – a gem in the Bay of Naples and Italy's Capital of Culture in 2022. Organized once again in this unique and inspiring setting, SUM 2026 will bring together leading international experts, researchers, practitioners, and policymakers — representing diverse disciplinary backgrounds — to explore the latest advancements and key challenges in circular economy, sustainable resource management, and urban mining. The previous edition, held in Procida in 2025, was a great success, attracting participants from 26 countries and a wide variety of disciplines. Building on this momentum, SUM has established itself as a truly multidisciplinary annual event, recognizing the increasing complexity of circular economy issues and the urgent need for integrated, cross-sectoral solutions.

More information here

Textiles recycling Expo - 24/25 June 2026, Belguim

This groundbreaking exhibition focuses specifically on solving the pressing issue of textile waste, including the recycling of fabrics, clothing, footwear, fibres and non-wovens.

Join us in Brussels, Belgium on 24-25 June 2026 for the free-to-attend exhibition and conference which is designed to drive collaboration and spark innovation.

Be part of a large international audience from across the complete supply chain including leading recyclers, waste managers, textile manufacturers, clothing suppliers, retailers, and other stakeholders.

More information here

Global Fiber Congress - 16/17 September 2026 – Dornbirn Austria

The Dornbirn GFC sees itself as an innovation platform for the global fiber, textile, nonwovens, finishing, and mechanical engineering industries and aims to function as a generator of ideas and networks. This is evident not only in the increasing number of participants but also, and perhaps more importantly, in their international origin.

More information here

14th ICSD, 09/10 September 2026, Rome ITALY

The International Conference on Sustainable Development is organized by the European Center of Sustainable Development in collaboration with CIT University.

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The 14th ICSD 2026 draws inspiration from the pressing challenges of environmental, economic, and socio-cultural sustainability, addressing the needs of present and future generations within a global-scale context.

More information here

Circular Economy Hotspot Budapest - 5-6 October 2026, Budapest Hongrie

The European Circular Economy Hotspot is an annual event, which has grown from a gathering first held in the Netherlands in 2016. It is held in a different location every year, with each host region chosen for demonstrating international best practice and innovation in the development of a circular economy. Previous European hosts have included: Dublin, Bottrop, Catalonia, Belgium, Scotland, Luxembourg and Wales. Collaboration lies at the core of these Hotspot events, offering a unique opportunity to build and strengthen partnerships both within Hungary and internationally—with other nations and regions.

In 2026, the Business Council for Sustainable Development in Hungary (BCSDH) and the Hungarian Circular Economy Platform was pleased to host the 2026 European Circular Economy Hotspot.

More information here

Advanced Recycling Conference - 17-18 November 2026 Cologne Germany

The unique concept of presenting all advanced recycling solutions and related topics at one event will guarantee a comprehensive and exciting conference experience, including technologies such as extrusion, dissolution, solvolysis, enzymolysis, pyrolysis, thermal depolymerisation, gasification, and incineration with Carbon Capture and Utilisation (CCU).

More information here

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