



CIRCULAR BUSINESS

FOCUS ON TEXTILES IN CATALONIA

Catalysing a circular textiles network in Catalonia

Analysing industry landscape⁽¹⁾ as a tool to influence policy making

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The textile and clothing sector in Catalonia is one of the most lasting and dynamic industries in the region. In recent years, it has focused on product specialisation and process optimisation to remain a competitive agent in the market.

Opportunities to further develop a circular economy in the textile industry are impacting business, researchers and policy makers alike. Mobilising effectively these stakeholders will be key for success in Catalonia and in other regions.

The textile and clothing industry in Catalonia has experienced a long history of expansion, crisis and reinvention during the last two centuries. After the most difficult years of the economic crisis, during which the overall sector in Europe contracted, the sector nowadays still represents an important part of the industrial production and value in Catalonia and of the overall textile sector in Spain.

The textile and clothing industry in Catalonia is composed by more than **4.100 companies** totalling more than a quarter of the companies operating in this sector in Spain (27,8 %) and a 2,25 % in the EU. In terms of value, this industry generates a total annual **turnover of 3.868 million €**, which is the **40 %** of the total turnover in Spain and a **2,32 %** of

the EU. The sector is also a **strong exporting market towards the EU** (60 % of exports have an EU destination) totalling a **30 %** of Spanish textile exports and a **2,7 %** of the EU.

The Catalan sector maintains the entire productive chain, from the yarn to the manufactured products, as well as **important industrial services**, such as design, logistics, with a strong growth today, or distribution, wholesale and retail, which occupies more than 50,000 people, in addition to having **specialized suppliers**, such as those of textile technology and those of specific chemical products to the sector.

⁽¹⁾ Based on Ellen Macarthur Foundation's RESOLVE methodology

The Catalan textile R&D system has led many EU LIFE Projects in the last decade such as Wooldryscouring, ECO-TEXNANO, MIDWOR-LIFE, LIFE MERMAIDS or LIFE-FLAREX.

The industry **stakeholders** operating in the textile and clothing sector in Catalonia are approaching the **circular economy path** as a further step in their day-to-day logic of **optimising their industrial processes**, making them more competitive in the use and management of resources and waste, while addressing an environmental and social imperative: the unsustainability of a **linear mode of production and consumption** that makes resources **scarce** and exponentially multiplies **waste**. In terms of their production process, companies are seeking to integrate new R&D developments in **water** and **energy efficiency**, to reduce production costs, and also new ways of reducing the generation of waste and wastewater pollution, driven by the **"polluter pays principle"**.

On textile and clothing industry in Catalonia.

Around **200.000** tons of post-consumer textile waste generated annually. This represents **4-5%** of municipal waste.

Industrial textile waste amounts **24.744** tons in 2016.

In relation to municipal textile waste, in 2016, **12.808** tons were treated in Catalan textile waste facilities for preparing for reuse purpose.



One of the biggest spaces of opportunity -and challenge, as well- seen by the industry stakeholders themselves, is the process of rethinking the ways they can effectively source their companies with alternative and abundant **secondary raw materials** in the region. Companies are willing to explore new ways of **closing the textile loop**: if the existent textile waste in Catalonia is efficiently recovered, sorted and treated it can be upcycled again within the sector itself, it can provide a **new competitive source of materials** for their production process and also prevent valuable materials to end up in landfills.



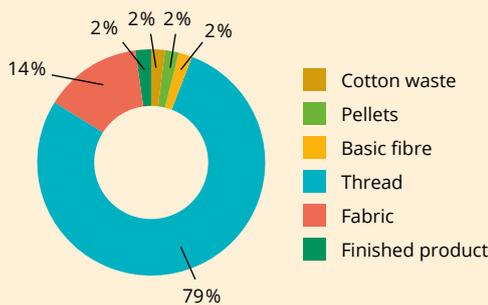


Post-consumer textiles are currently collected by foundations or cooperatives (such as the cases of HUMANA or ROBA AMIGA), which recover a significant amount of clothes both for reuse (in the region or in communities abroad) and **recycling**. However, the structure of textile collection can be further improved with further incentives (in line with the new waste directive recently approved by the European Parliament in April 2018), such as mandatory selective collection schemes for textiles. Also, waste treatment plants need to be further specialised to circularise those

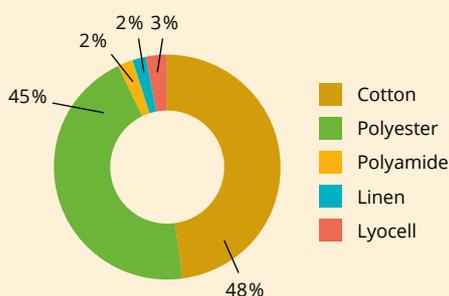
pre-consumer and post-consumer textile waste: nowadays Catalonia has **58** textile waste treatment companies, 7 of which are specialised in textile products (3 in pre-consumer and **4** in post-consumer textiles). Catalan textile manufacturers are progressively adopting **global certification schemes**, including recycled content in their threads and fabrics (such as the Global Recycled Standard, present in textile 58 products of 18 manufacturers in the region). Currently there is also a Catalan company awarded with the **EU Ecolabel** for a wool yarn.

To further articulate this system, companies, researchers and public bodies should find new spaces for **cooperation, sharing knowledge** and **build up new projects** that respond to sectorial and territorial needs.

Type of GRS certified products in Catalonia

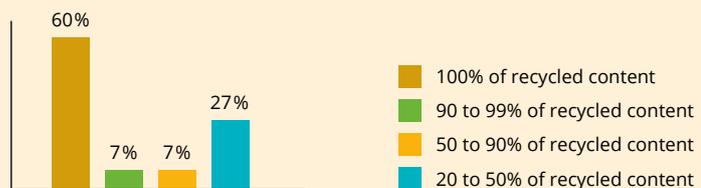


Type of material of each GRS certified product in Catalonia

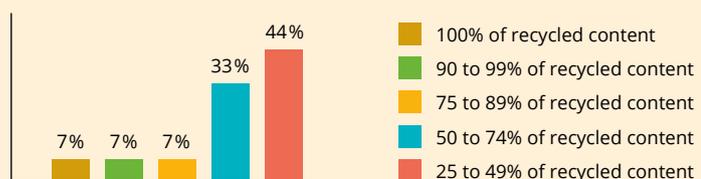


Based on data from GRS - Textile Exchange.org

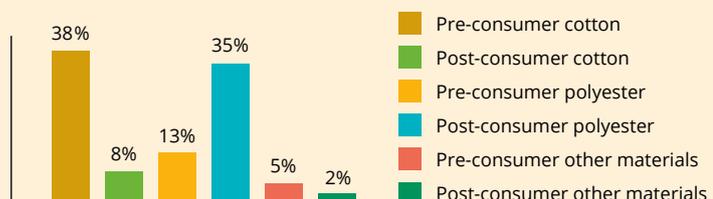
Amount of recycled polyester (%) in each GRS certified product in Catalonia



Amount of recycled cotton (%) in each GRS certified product in Catalonia



Stage of recovery of the recycled material of each GRS certified product in Catalonia





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The textile and garment sector in Catalonia is **highly clustered** in dynamic platforms such as Texfor, Fagepi, Asegema, AEI Textils (Technical Textiles); MODACC (fashion); AEGP (knitwear) or MSBCN which foster innovation among their members.

The maturity of the textile and clothing sector in Catalonia to implement innovations that strengthen a **sustainable and competitive** activity is proven by their approach to challenges that impact on the **overall value chain** (leading projects and activities through their clusters and research centres), such as those which address transformation of the linear model onto a **circular one**. Beyond the necessary **technical innovations** in textile manufacturing, one of the main needs arisen among stakeholders facing the prospects of implementing a circular textiles network –transforming the very nature of the current value chain- is an issue of **generating, auditing, accessing and sharing information** amongst players of different nature

involved in the textile and clothing sector: whether manufacturers, retailers, consumers, recyclers, research centres, public institutions. Digital systems and platforms that enhance **traceability and transparency** in the sector will be the key enabling technology to catalyse the **circular transition**: serving citizens, public administration and the industrial reality of manufacturers, wholesalers and retailers which are seeking to maintain efficiency and competitiveness while making a rational use of resources to pursue their activity.

The circular economy is about laying out systemic solutions. All stakeholders impacted should take part in the process.

FIND OUT MORE

Sources of information :

- Catalunya circular, the observatory of the circular economy in Catalonia : <http://mediambient.gencat.cat/catalunyacircular>
- Waste Agency of Catalonia <http://residus.gencat.cat/en/inici/>
- ACCIO <http://www.accio.gencat.cat/ca/inici>
- Ellen MacArthur Foundation <https://www.ellenmacarthurfoundation.org/>

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