



EUROPEAN

AFFAIRS



# EUROPEAN STRATEGY FOR SUSTAINABLE & CIRCULAR TEXTILES

March 2022, the European Commission launched its Strategy for Sustainable Textiles to realize a greener, competitive & resilient textile sector. It includes, amongst others legal acts for eco-design, waste prevention and circularity. By 2030, it will overhaul textile supply chains.

## EU TEXTILE STRATEGY IMPACT & TIMELINE

### TIMELINE

### IMPACT

2027



Only **low environmental footprint & durable apparel** circulating on EU27 market - compliant with ecodesign requirements

**Ban on unsold goods destruction** leads to more made-to-order production & leaner supply chains.

2028



**Extended Producer Responsibility** for textiles in EU27 pays for end-of-life treatment of textiles

2030



**Digital Product Passport** for textiles in EU27 provides traceability & transparency





# E C O D E S I G N

## WASTE FRAMEWORK AND WASTE SHIPMENT

*The strategy's key legislative projects to enable textiles circularity are the Eco-design for Sustainable Products Regulation, the Waste Framework Directive, and the Waste Shipment Regulation. Those pillars should realize circularity in Europe and are discussed in the following sections, together with their expected timeline of implementation.*

### ECO-DESIGN FOR SUSTAINABLE PRODUCTS LEGISLATION

This legislation will set eco-design principles for many product categories, among which textiles have top priority. It has been active since July 2024. The ESPR legislative text is quite general and product specific legislation will complement it in coming years. Textiles legislation will be ready by 2028.

#### LEGAL ACTS

- Sets eco-design performance requirements for products (durability, reusability, reparability, environmental footprint, recycled content ...)
- Establishes a digital product passport (DPP), to include eco-design information requirements such as substances of concern, Information for maintenance, Information for End-Of-Life treatment.
- Provides for the setting of mandatory green public procurement requirements.

#### EXPECTED IMPACT

- accelerate the development of separate collections, sorting, reuse, and recycling of textiles in the EU.
- producers of textiles & footwear finance the costs of collecting, sorting for re-use, preparing for re-use and recycling of collected used & waste textiles/footwear. Costs for research and development to improve the sorting and recycling processes, data gathering and reporting will be financed through the EPR system.
- funding will become available for developing recycling capacity (from EPR contributions).
- scale-up of textile reverse supply chain & adding recycling capacity.
- opportunities for new recycling processes & technologies.

#### TIMELINE

Currently, a preparatory study is running to prepare the implementation for apparel products (identifying best available technologies, base cases for lifecycle costing and proposals for design options). The intention is to use Product Environmental Footprint category rules on Apparel to

develop eco-design requirements. The eco-design forum (industrial & stakeholders, among which Euratex) will review the study.

- **Late 2025:** first acts on digital product passport registry (for service providers, data carriers).
- **Early 2026:** preparatory study on apparel will start to define eco-design requirements for apparel, together with impact assessment.
- **July 2026:** ban on destruction unsold textiles (for large companies), of SMEs in 2030.
- **2027 – 2028:** first eco-design requirements for apparel products. A scoring system for reparability will be developed. For footwear, a study will be commissioned that should be completed by end of 2027. Any product specific legislation will follow then probably 2029...
- **2029:** mattresses will fall into scope. Requirements on recycled content and recyclability will be adopted.
- **2030:** digital product passport: mandatory for textiles. The Commission has already started the required standardization process to set rules on data carriers, infrastructure and data interoperability, which are needed to enable the product passport system to develop. The information to be included in the digital product passport will be specified in product-specific legislation to be ready in 2028.



## WASTE FRAMEWORK DIRECTIVE (WFD)

This legislation's main tool is installing the Extended Producer Responsibility (EPR), as already active for electronic products whereby economic actors, setting textiles products on the EU27 market remain responsible for the end-of-life treatment of their products sold. This legislation is not active yet, though the final hurdle, European parliament approval, is scheduled for 2025. As this is a directive, it needs to be implemented in member states legislation.

### LEGAL ACTS

- Sets rules for management of used and waste textiles.
- Mandatory separate collection of textile waste,
- Min. requirements for textile waste re-use & recycling.
- Implements the "Polluter Pays" principle via the installation of Extended Producer Responsibility (EPR) whereby entities putting textiles on the EU27 market will have to pay for the end-of-life treatment of the textiles (like for plastics and electronic goods). Amounts depend on the product eco-score (PEF, possibility to recycle etc. as to described in product specific Eco-design regulations to be issued in 2027).

### EXPECTED IMPACT

- Accelerate the development of separate collections, sorting, reuse, and recycling of textiles in the EU.
- Producers of textiles & footwear finance the costs of collecting, sorting for re-use, preparing for re-use and recycling of collected used & waste textiles/footwear. Costs for research and development to improve the sorting and recycling processes, data gathering and reporting will be financed through the EPR system.
- Funding will become available for developing recycling capacity (from EPR contributions).
- Scale-up of textile reverse supply chain & adding recycling capacity.
- Opportunities for new recycling processes & technologies.

### TIMELINE

- **2025:** From this year on, members states are obliged to assure separate collection of textile waste. Currently, the Commission is developing End-

of-Waste criteria for textiles to define from where recycled textiles are no longer considered as waste.

- **Mid 2028:** Extended Producer Responsibility schemes to be active in most EU27 countries.

- Improve functioning internal market for waste shipments for to boost market for secondary materials & recycling.
- Limit waste shipment outside EU.

## WASTE SHIPMENT REGULATION

The main objective of the act is to kickstart an EU 27 internal market for (textile) waste and to prevent textile waste being shipped overseas. The regulation will apply from 21 May 2026.

### LEGAL ACTS

Set up EU wide control procedures for the shipments of waste to:

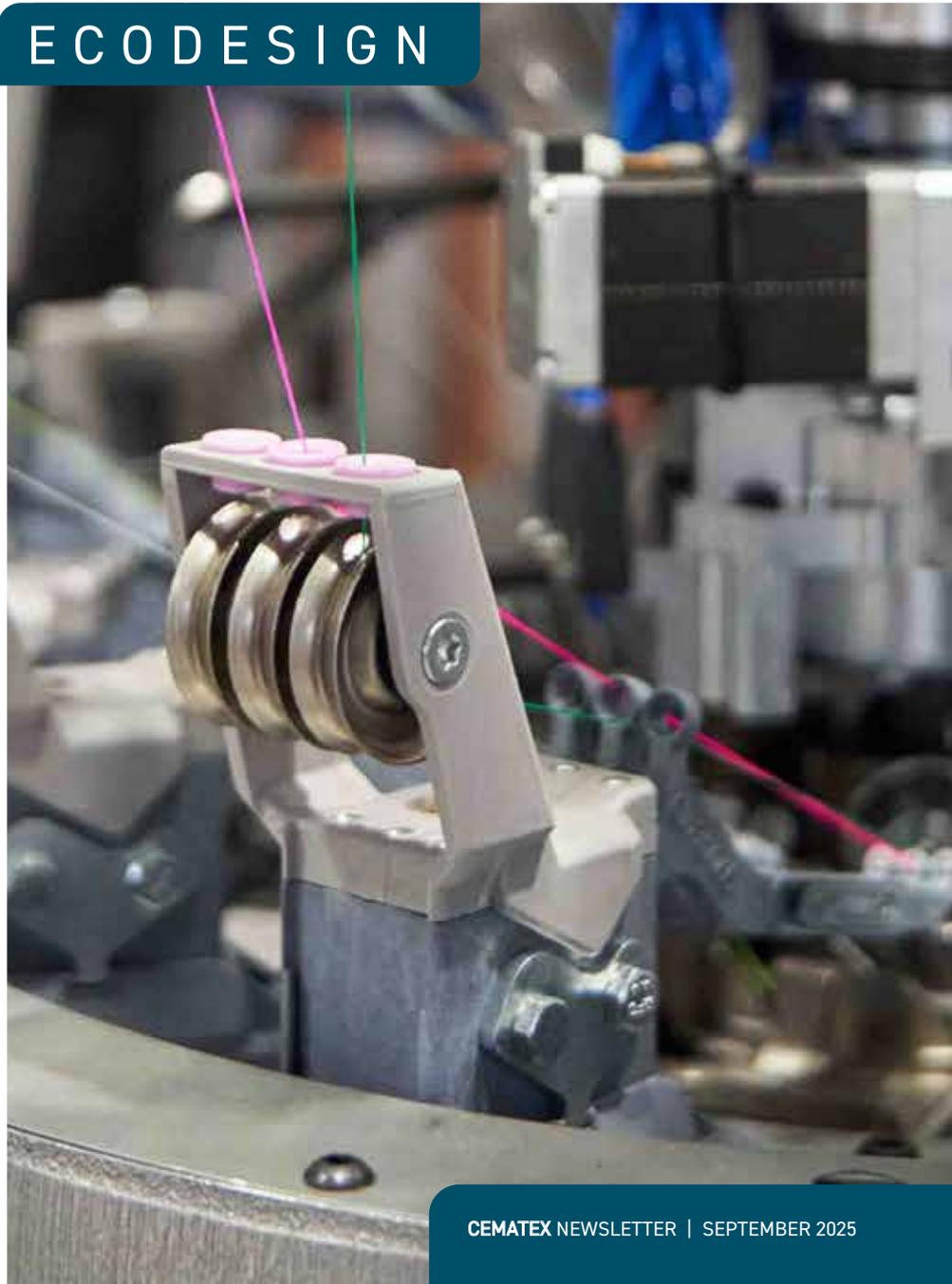
### EXPECTED IMPACT

Increase availability of secondary materials to bring prices of recycled fibres down

### TIMELINE

- **Nov 2026:** easier to ship waste around within EU, limits for waste shipment outside the EU

## E C O D E S I G N



# CEMATEX

## MEMBERSHIP'S EXPECTATIONS

*Given the armada of European legal acts unleashed on the textile industry, Cematex surveyed its members on their expectations on the strategy's impact.*

Cematex circulated a questionnaire among its members, asking about opportunities & challenges due to the implementation of the strategy. Here follows a summary of the 73 responses.

### OPPORTUNITIES

Over 68% expects increased opportunities for:

- End-of-life sorting machines.
- Machinery for pre-treatment of textile waste before recycling.
- New mechanical recycling technology.
- New measurement technology & sensors.
- New IT & software to generate digital product passport and environmental footprint data.

For machine retro fits & updates to process recycled materials, 60% expects an increase.

52% expect that fabric compositions will change whereby mixed materials will be replaced by pure ones. 31% believe there will be no change to yarn/fabric composition.

53% expect opportunities for processes that produce virgin sustainable fibres. Types of such virgin sustainable fibres mentioned (are mostly man-made cellulosic fibres e.g. wood pulp based like lyocell, viscose, flax, hemp and bamboo).

Other opportunities seen by Cematex members are near shoring of textile production, more make to order & customisation and investments in chemical recycling technologies.

### CHALLENGES

In addition to opportunities, respondents agree on many challenges ahead.

More than 80% of respondents fully or partially agree these are the main challenges:

- Insufficient market demand for products made with secondary materials.
- No functional market surveillance to verify the recycled/sustainable content of imported textiles.
- The growing number of regulations endanger the future of the EU textile industry further.
- Further loss of European customers will negatively impact our innovation and development processes.

70% of the respondents agree or partially agree to the statement that sustainable virgin fibers (e.g. sourced from cellulose and others) will make it hard for recycled fibers to become price competitive.

More than 70% of respondents believe they will be able to provide a competitive offer to customers for machines capable of working with sustainable/recycled fibers/yarns/fabrics.

Little over 60% of respondents expect that the market for mechanical recycling technologies will remain a niche market.

Nearly 60% of respondents expect there will be insufficient secondary raw materials available to comply with regulatory requirements. Only 55% of the respondents expect that the upscaling of chemical recycling technologies to produce recycled fibers of sufficient quality at competitive

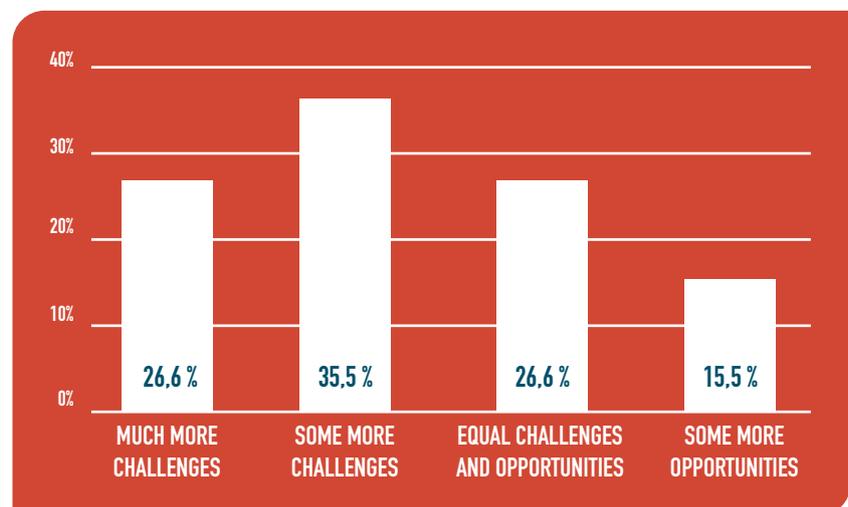
cost levels will happen. 75% of respondents do not expect a drop in any type of machine.

Overall, 62% of the respondents see more challenges than opportunities because of the EU Textiles Strategy. Only 15,5 % are fully optimistic.

### SOME CEMATEX MEMBERS PROVIDE US WITH KEY TAKEAWAYS

*Effective regulation enforcement is necessary to kickstart the market for textiles with recycled content. Otherwise, textiles with recycled content will not be sold & bought for cost/simplicity reasons.*

*The pace at which regulation in the rest of the world follows contributes to the development speed of the market for textiles with sustainable/ recycled content.*



# CEMATEX INVOLVEMENT IN THE EU TEXTILE STRATEGY

*To monitor the EU textile strategy's impact, Cematex works with EURATEX, the European Apparel and Textile Confederation. Cematex also liaises directly with the European Commission and participates in the EU Textiles Ecosystem Transition Pathway, an initiative of the European Commission to realize the EU strategy for sustainable and circular textiles. Cematex has pledged support for the broader sustainability movement with the undertaking of several actions to be taken in the context of ITMA & ITMAASIA shows. Cematex is also present on the EU Textiles Ecosystem Platform to connect with stakeholders and stay informed on what happens in the EU textiles Ecosystem.*



**CEMATEX**

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# Accelerating the Green Transition

# ITMA SUSTAINABILITY FORUM

30 October 2025  
Peridot Room 201-202  
Singapore Expo

Hear from the European Commission on the EU Textile Strategy and learn how policies and green finance are shaping textile mill investments and demands for your technologies. Connect with leaders turning sustainability into profitable action. Register today!

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