
TEXTILE FLOWS IN THE BALTIC STATES (AND WHAT THEY TELL US)

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PlanMiljø

TEXTALE

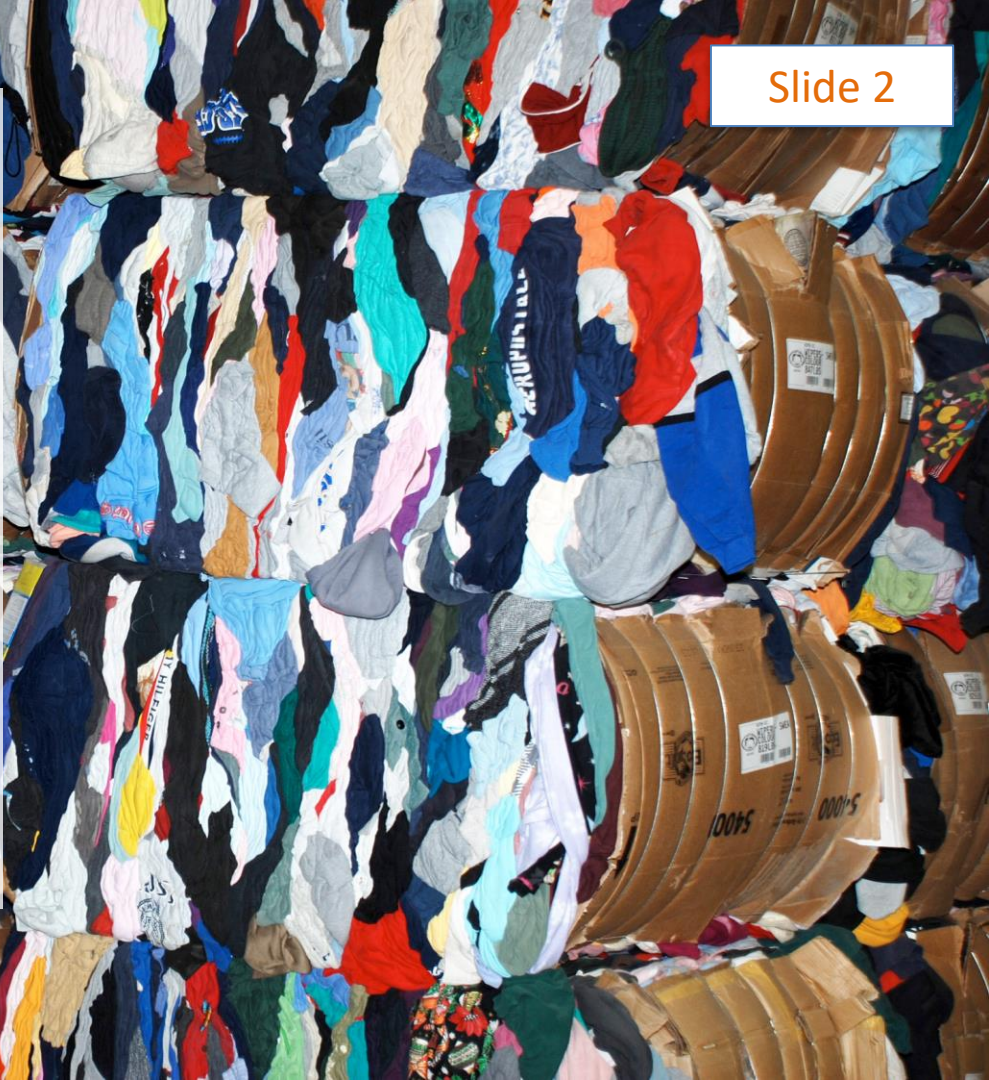


Zaļā brīvība

PlanMiljø

Background

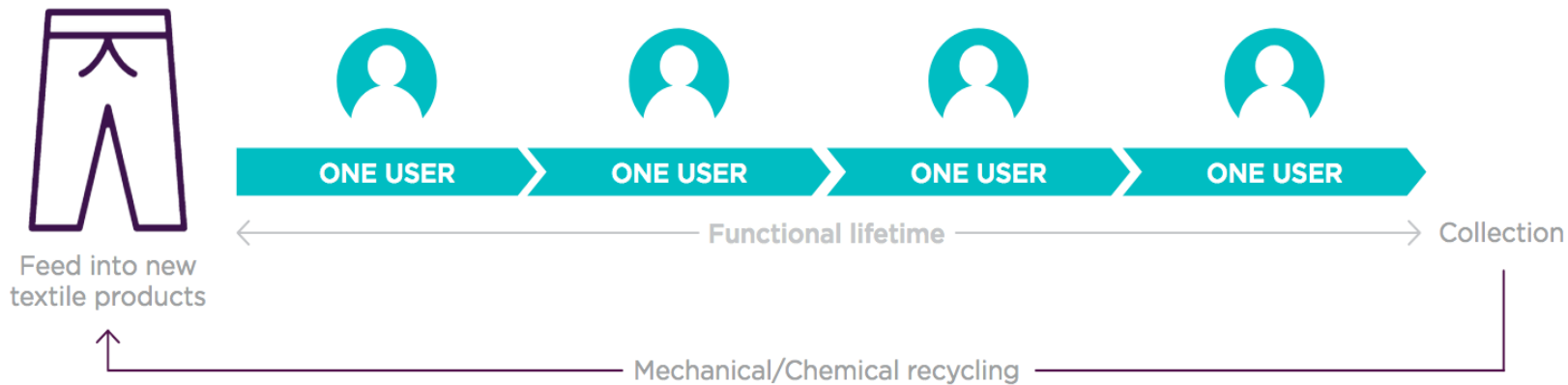
- Increasing focus on **sustainability** in textile value chain in Europe
- Key leverage point: **increasing circularity**



Where we are now

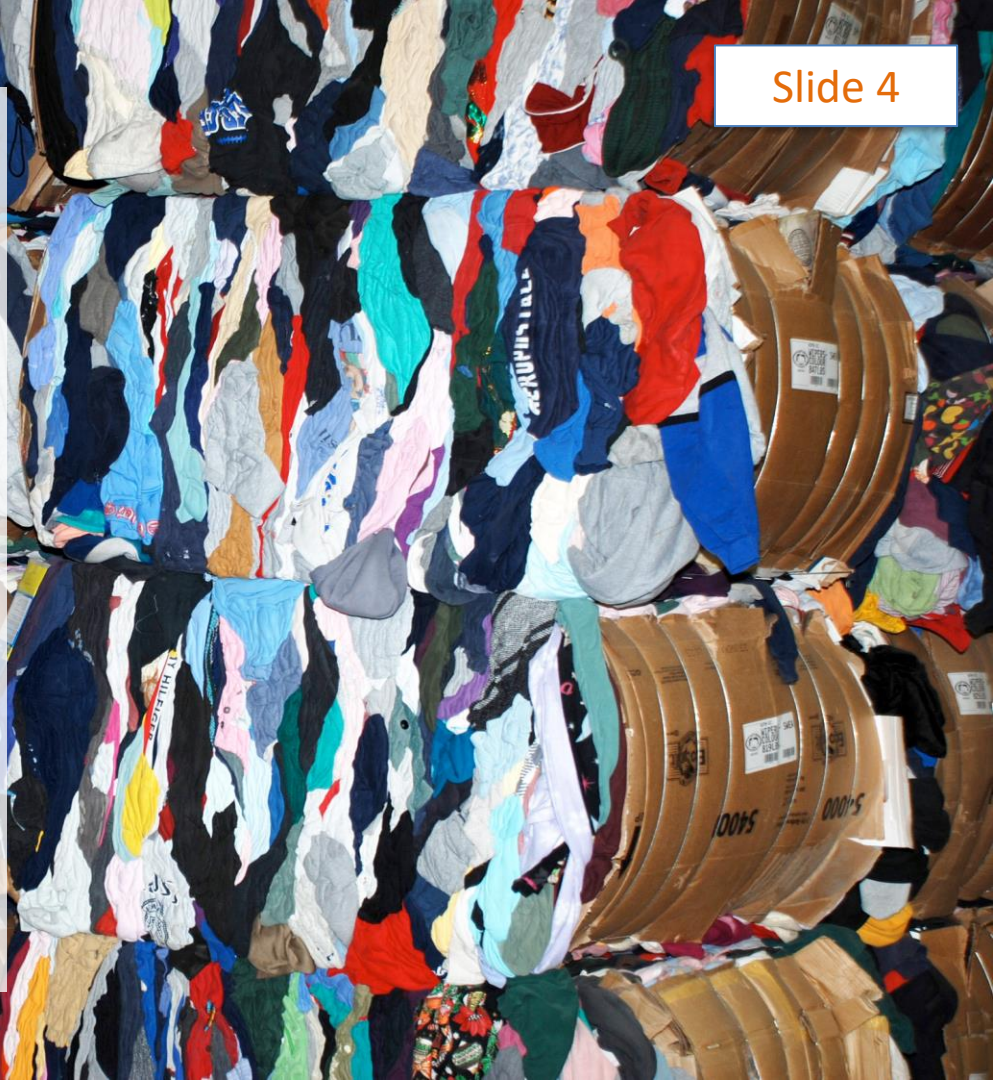


Where we need to get to



Background

- Increasing focus on **sustainability** in textile value chain in Europe
- Key leverage point: **increasing circularity**
- **EU Circular Economy package** – separate collection of used textiles 2025
- Baltic States play key role in **circularity of Nordic textiles**
- How about **Baltic's own post-consumer textiles?**



Background

- Increasing focus on **sustainability** in textile value chain in Europe
- Key leverage point: **increasing circularity**
- **EU Circular Economy package** – separate collection of used textiles 2025
- Baltic States play key role in **circularity of Nordic textiles**
- How about **Baltic's own post-consumer textiles?**

Goal of mapping

Provide **picture of flows of textiles** in Baltic States as basis for potential circularity actions

Identify **challenges and opportunities** for region

Wished for result

1. Annual consumption of new textiles



Use of import/export and production data

2. Annual consumption of used textiles



(output from elements 3. and 6. below)

3. Separate collection and treatment of textiles from households



Survey of charities/commercial collectors, municipal waste companies

4. Challenges in collection and treatment



ditto

5. Quantity of discarded textiles in mixed waste



Use of existing picking study data plus mass balance approach

6. Imports and treatment of used textiles

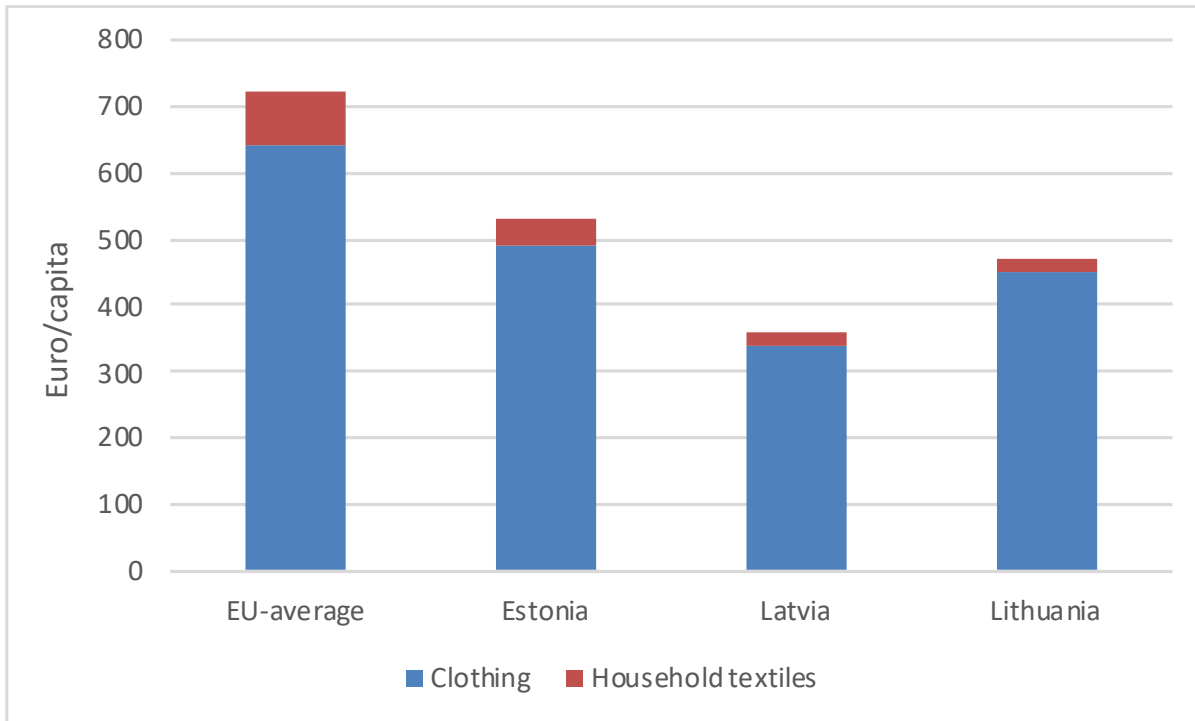


Import/export data and survey of wholesalers/sorting companies

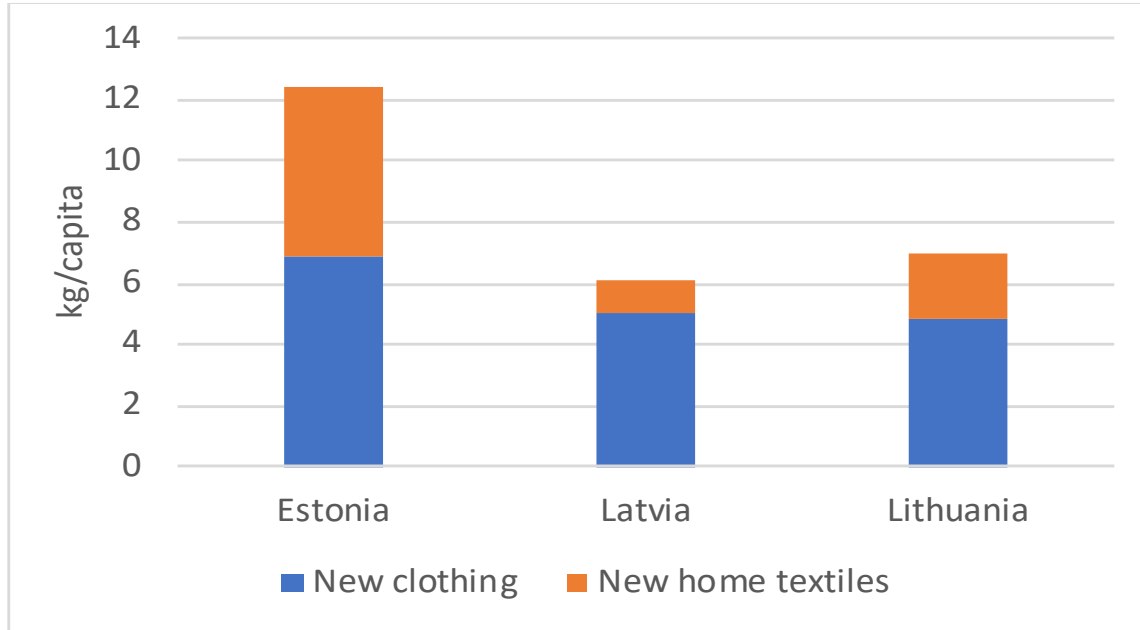
A photograph of a clothing store rack filled with various garments, including sweaters, blouses, and shirts in a wide range of colors and patterns. The items are hanging on white hangers from a metal bar. A semi-transparent white box is overlaid in the center of the image, containing the text 'Consumption of textiles'.

Consumption of textiles

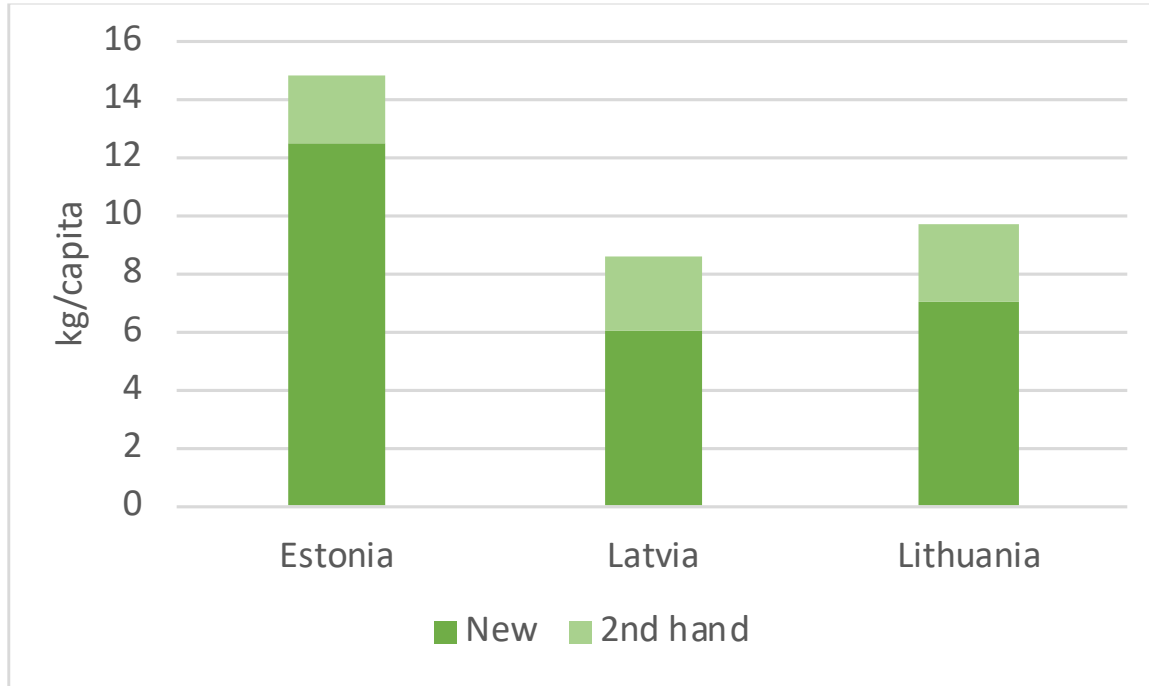
Household expenditure on textiles (2018)



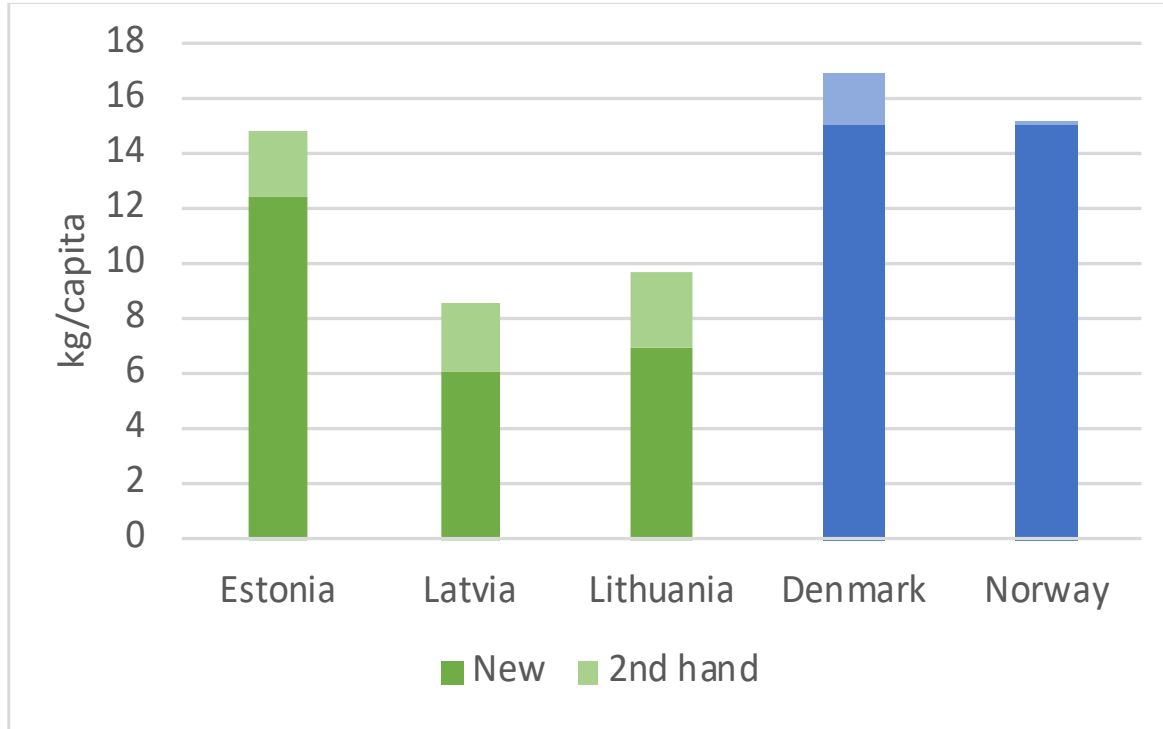
Consumption by volume of new textiles (2018)



Consumption by volume of new and used textiles (2018)



Comparison to Nordic consumption

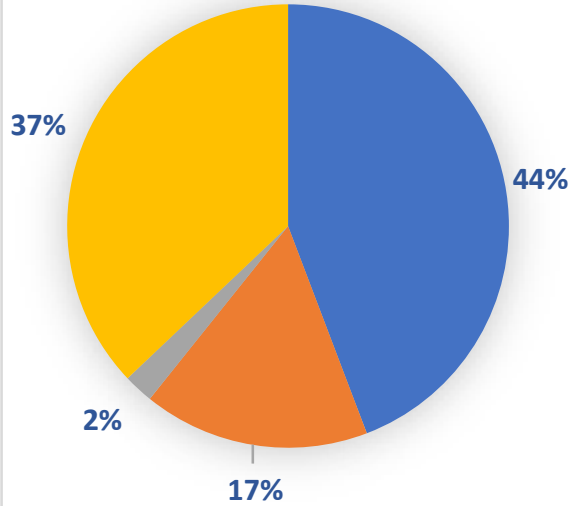


Collection of used textiles

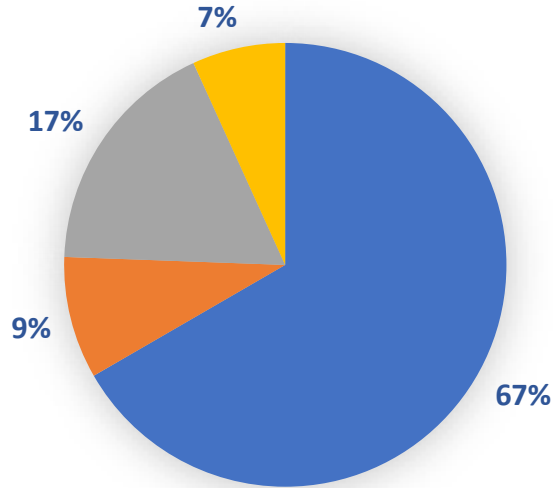


Separate collection from households

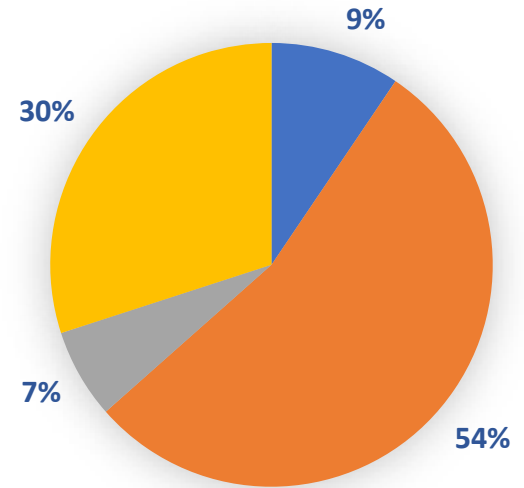
Estonia



Latvia



Lithuania



■ Charities/social enterprises

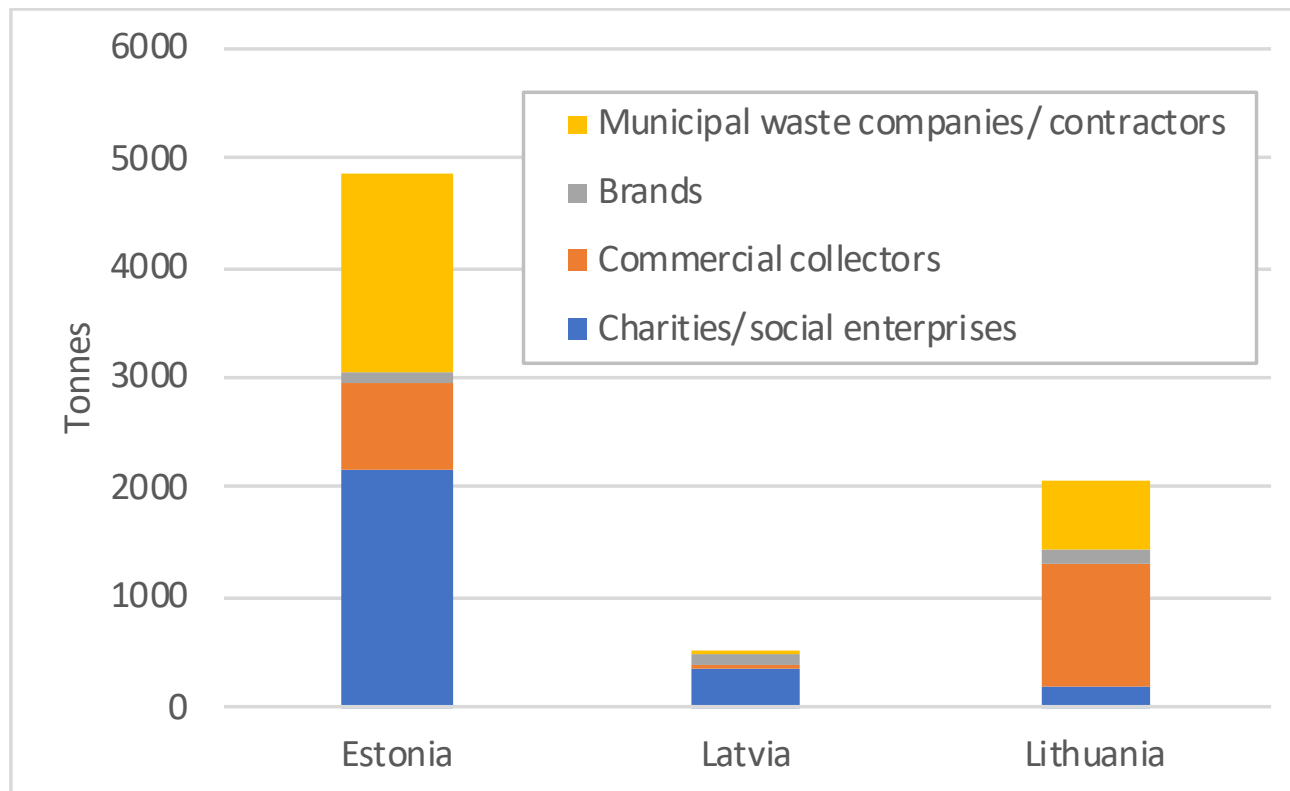
■ Brands

■ Commercial collectors

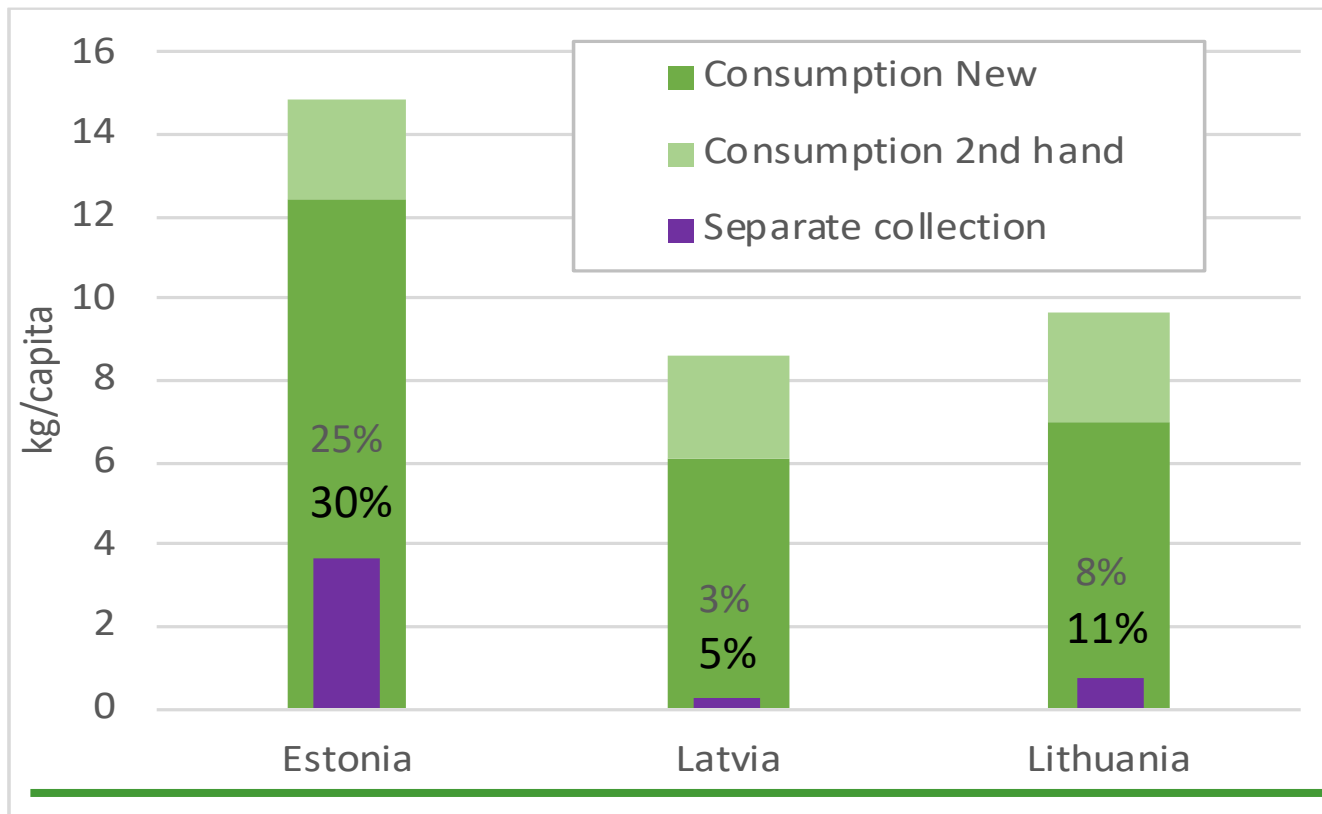
■ Municipal waste companies/contractors



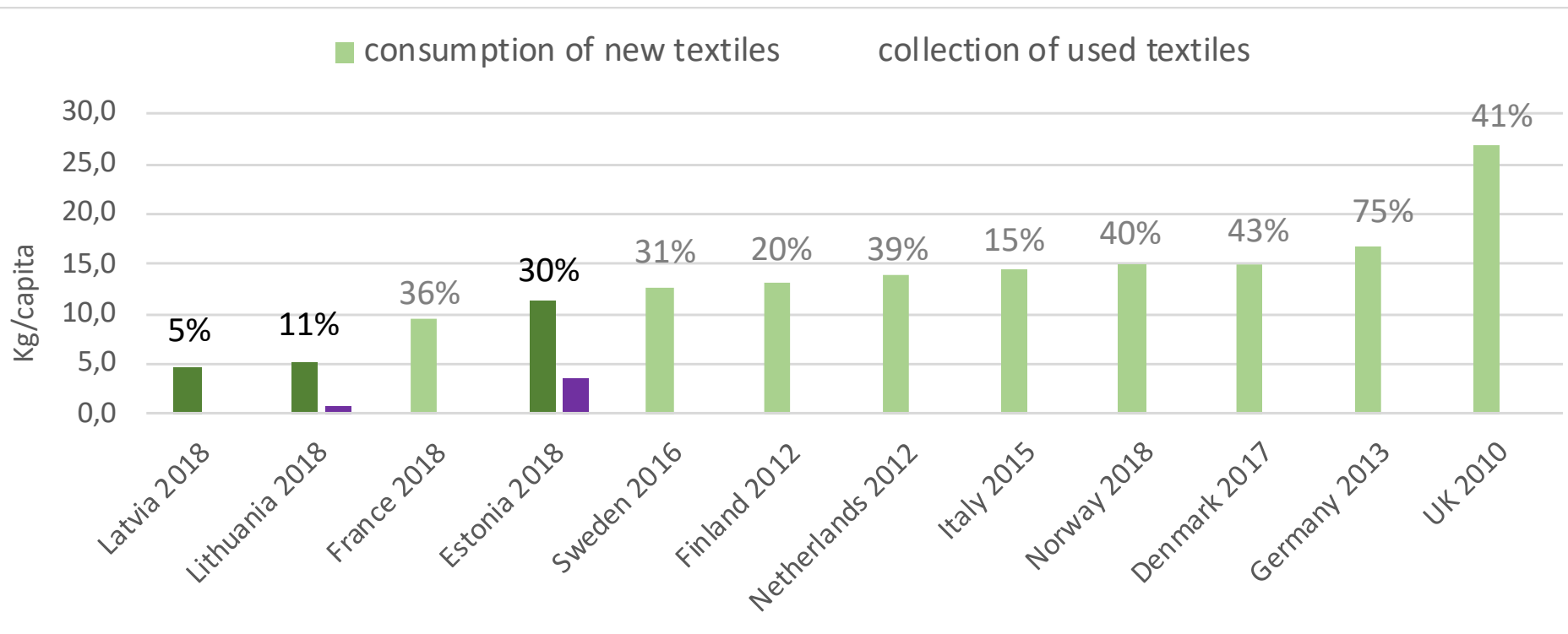
Separate collection from households



Separate collection from households (as share of consumption)



Comparison with other countries

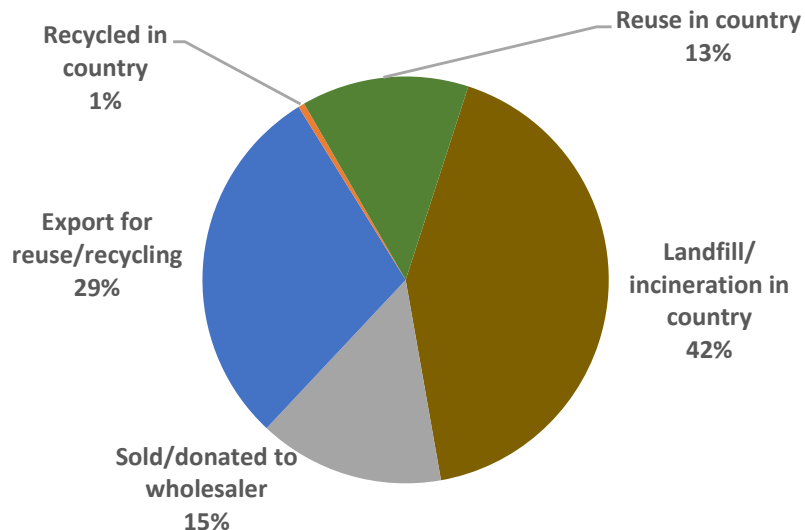


A large pile of various colored and patterned textiles, including shirts and jackets, with a central text overlay. The pile consists of many items, including a blue and white striped shirt, a white shirt with thin red and blue stripes, a black jacket, a blue and white plaid shirt, and a yellow shirt. The background is a plain, light-colored surface.

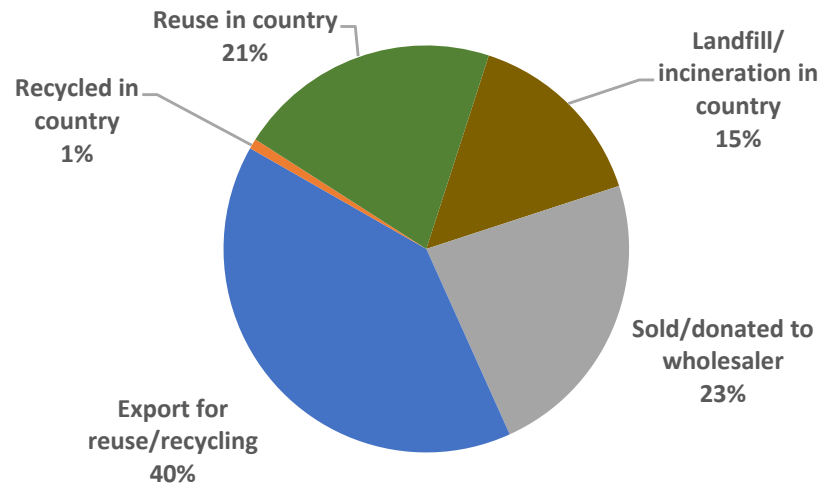
Treatment of
separately collected
textiles

Treatment of separately collected textiles (all Baltics)

All Collectors

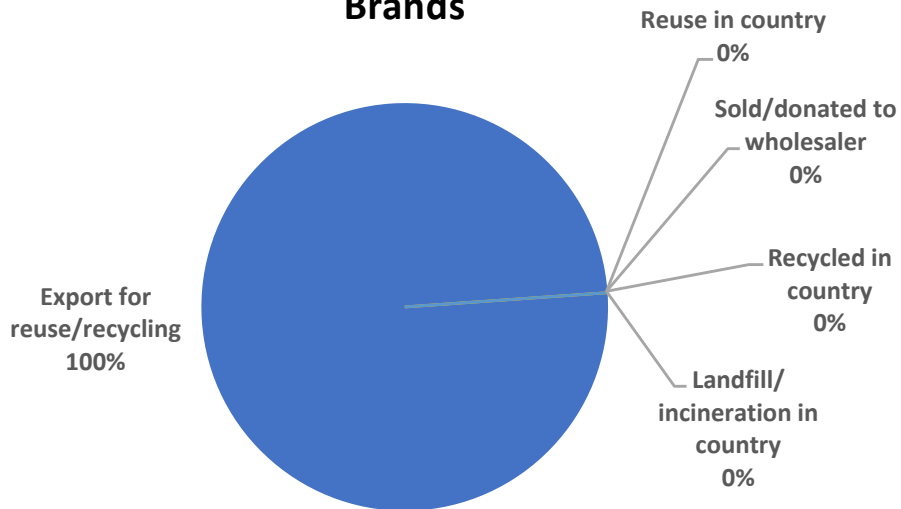


Charitable/commercial collectors

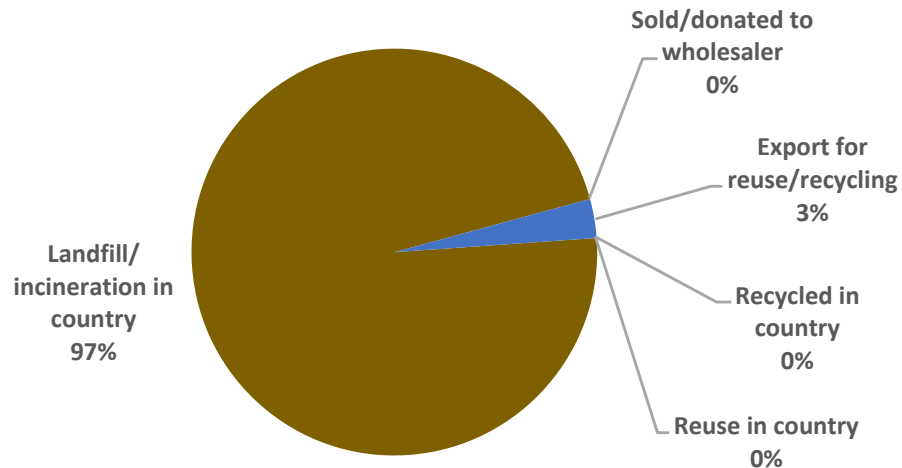


Treatment of separately collected textiles (all Baltics)

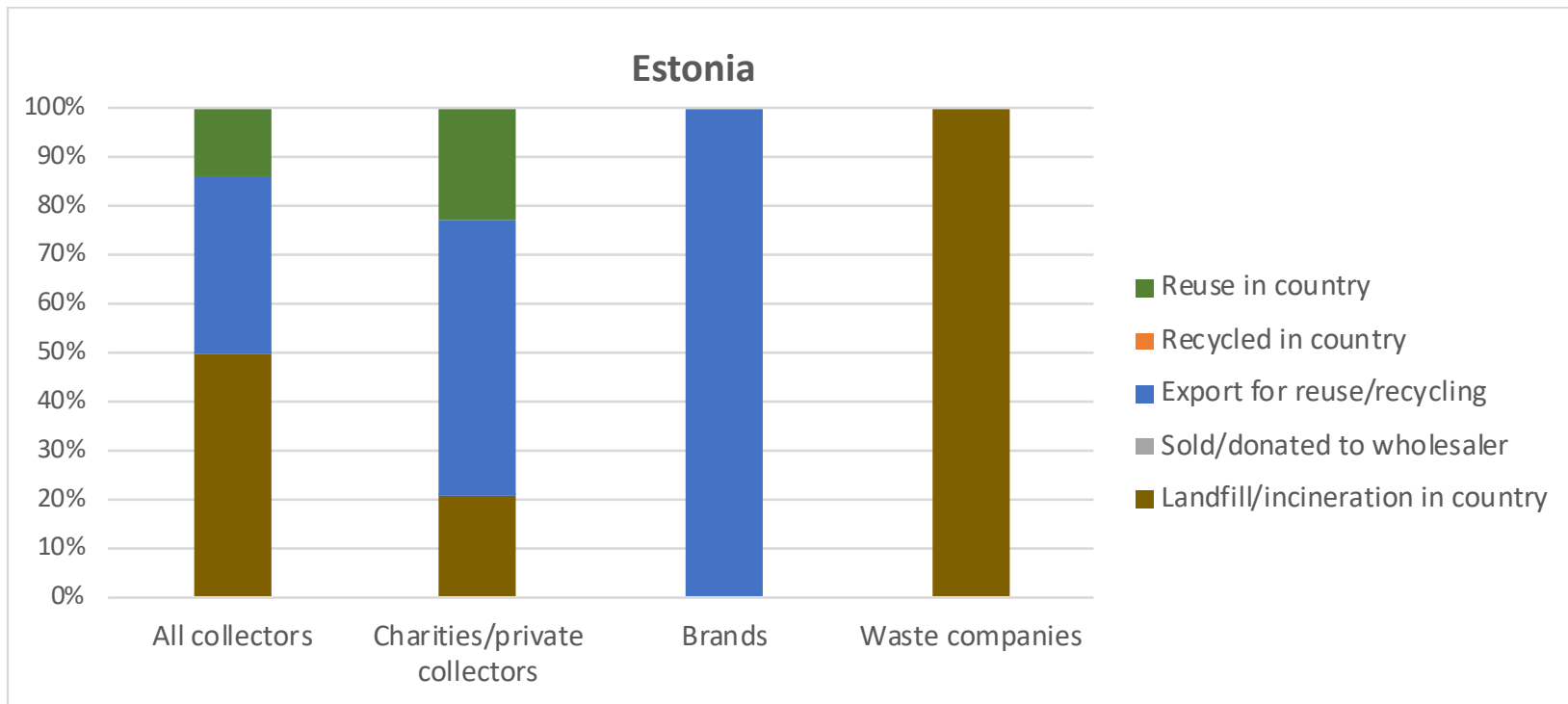
Brands



(Municipal) waste companies



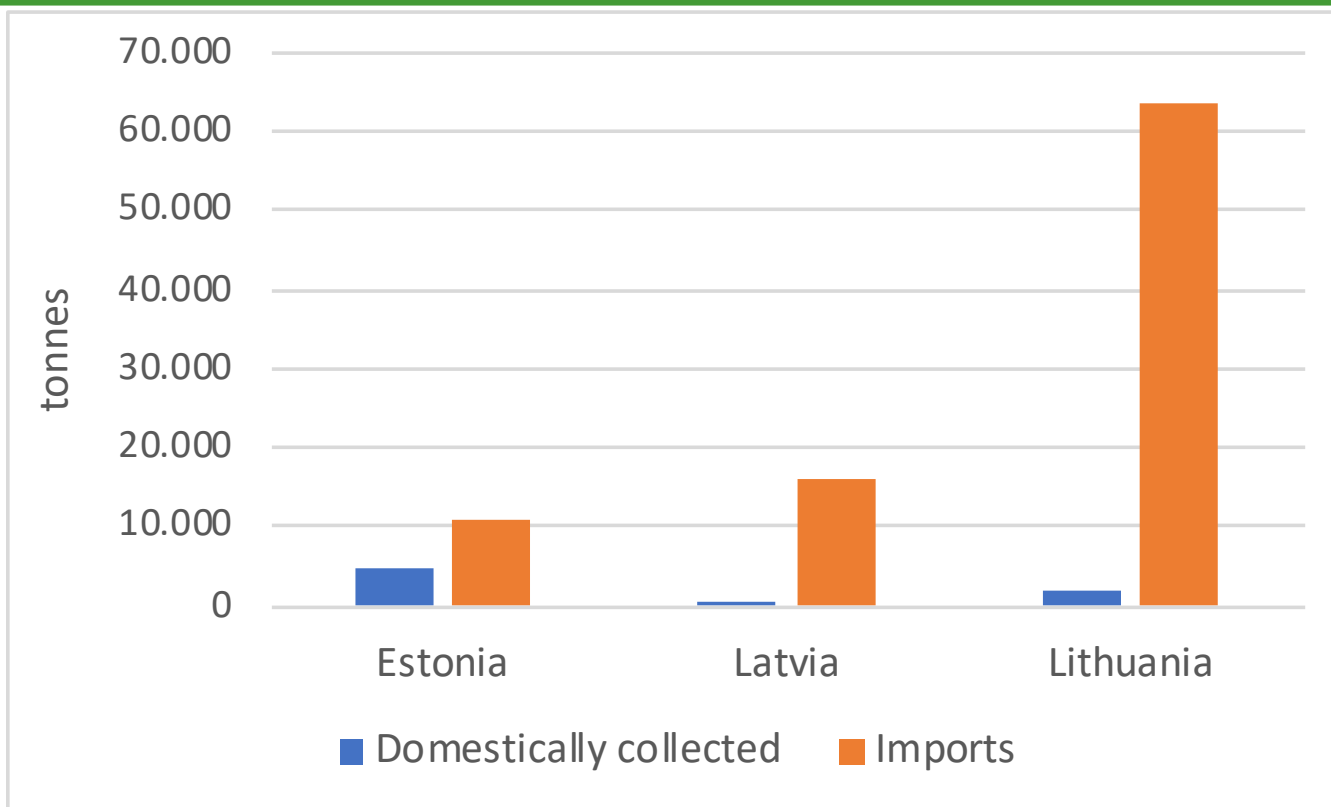
Treatment of separately collected textiles (Estonia)



The wholesale sector

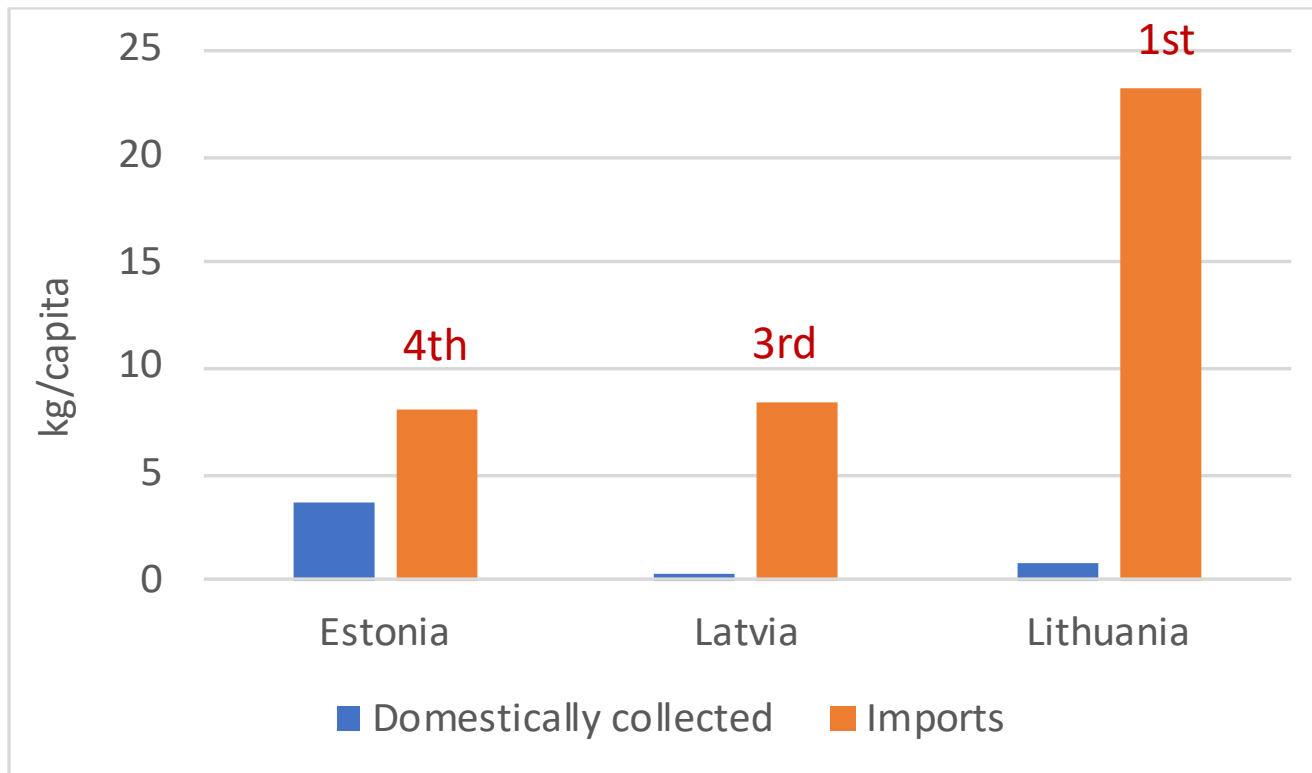


Imports of used textiles



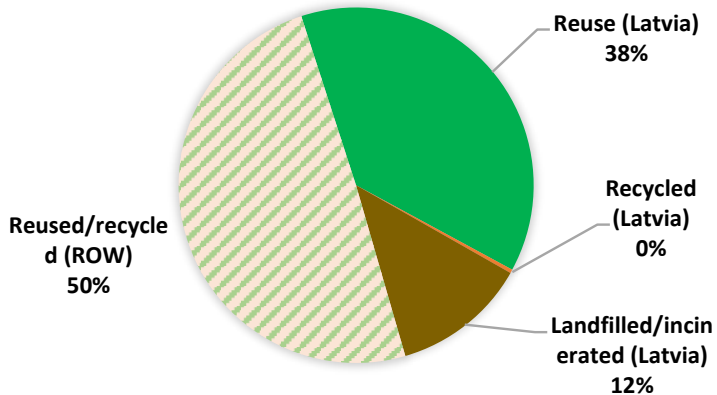
Imports of used textiles

Rank in EU

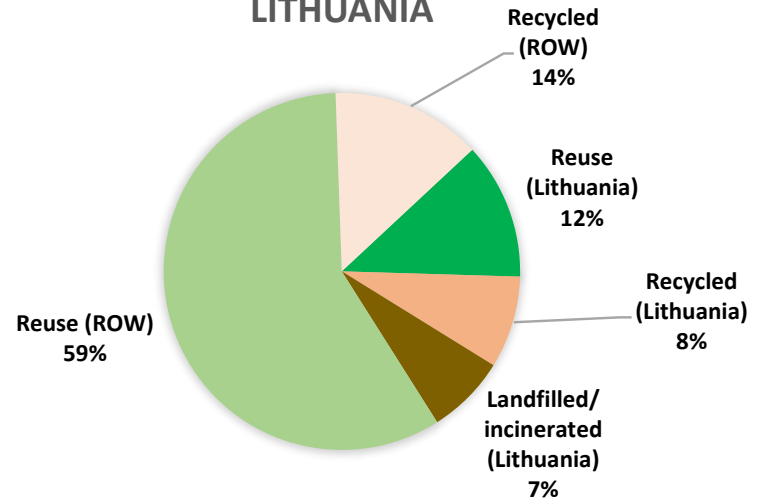


What happens to imported used textiles?

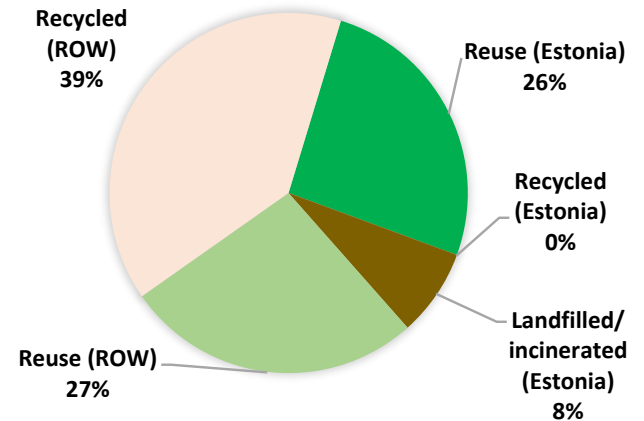
LATVIA



LITHUANIA



ESTONIA





Key messages

Consumption patterns are relatively sustainable:

- **Consumption of new clothing is relatively low** in Latvia and Lithuania
- **Clothing is used more intensely before being discarded** – not throwaway societies
- **Consumption of second-hand is high:** 1/3 of total consumption in Latvia and Lithuania, 1/6 in Estonia

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!

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 2nd 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

Key opportunities

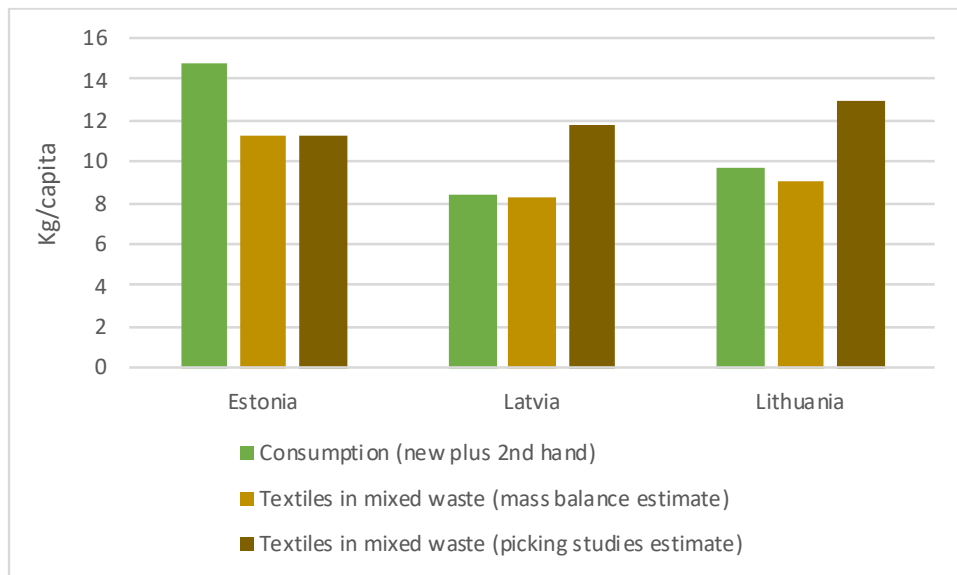
- Good conditions for **investments in closed loop/open loop recycling facilities** – large consistent supply of non-reusable textiles, sorting facilities ready for adaptation
- Good opportunities for **large scale upcycling/redesign** – consistent supply of used fabrics, lower labour costs, skilled workers. Sales back to Nordic markets?
- **Circular consumption culture** already exists

But **policy commitment needed** to achieve and nurture these opportunities!!

Thank you for listening!

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Quantity of textiles in mixed waste streams?



What happens to textiles in mixed waste streams?

	Landfill	Incineration
Estonia	34%	66%
Latvia	97%	3%
Lithuania	66%	34%