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

Vilnius 28th January 2020

David Watson, PlanMiljø
Background

• Increasing focus on **sustainability** in textile value chain in Europe

• Key leverage point: **increasing circularity**
Where we are now

<table>
<thead>
<tr>
<th>ONE USER</th>
<th>NOT IN USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional lifetime</td>
<td>Incineration/landfill/downcycling</td>
</tr>
</tbody>
</table>

Where we need to get to

<table>
<thead>
<tr>
<th>ONE USER</th>
<th>ONE USER</th>
<th>ONE USER</th>
<th>ONE USER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feed into new textile products</td>
<td>Functional lifetime</td>
<td>Collection</td>
<td>Mechanical/Chemical recycling</td>
</tr>
</tbody>
</table>
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
2. Annual consumption of used textiles
3. Separate collection and treatment of textiles from households
4. Challenges in collection and treatment
5. Quantity of discarded textiles in mixed waste
6. Imports and treatment of used textiles

Method

- Use of import/export and production data
- Use of existing picking study data plus mass balance approach
- Import/export data and survey of wholesalers(sorting companies)
- Survey of charities/commercial collectors, municipal waste companies
- (output from elements 3. and 6. below)
- ditto
Consumption of textiles
Consumption of new and 2nd hand

- Estonia
- Latvia
- Lithuania

kg/capita

New  2nd hand
Consumption of new and 2nd hand

<table>
<thead>
<tr>
<th>Country</th>
<th>2nd Hand</th>
<th>New Home Textiles</th>
<th>New Clothing</th>
<th>Total (kg/capita)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td></td>
<td></td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>Latvia</td>
<td></td>
<td></td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>Lithuania</td>
<td></td>
<td></td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

Notes: Questions marks (?) indicate missing data.
Collection of used textiles
Separate collection from households

- Estonia:
  - Charities/social enterprises: 37%
  - Commercial collectors: 44%
  - Municipal waste companies/contractors: 2%
  - Brands: 17%

- Latvia:
  - Charities/social enterprises: 67%
  - Commercial collectors: 17%
  - Municipal waste companies/contractors: 9%
  - Brands: 7%

- Lithuania:
  - Charities/social enterprises: 30%
  - Commercial collectors: 54%
  - Municipal waste companies/contractors: 9%
  - Brands: 7%
Separate collection from households
Separate collection from households (share of consumption)

- **Estonia**
  - Consumption New: 32%
  - Consumption 2nd hand: 27%
  - Separate collection: 10%

- **Latvia**
  - Consumption New: 6%
  - Consumption 2nd hand: 4%
  - Separate collection: 15%

- **Lithuania**
  - Consumption New: 15%
  - Consumption 2nd hand: 10%
  - Separate collection: 6%
Separate collection from households (share of new consumption)

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Consumption of new textiles</th>
<th>Collection of used textiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latvia</td>
<td>2018</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>2018</td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>France</td>
<td>2018</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Estonia</td>
<td>2018</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>Sweden</td>
<td>2016</td>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>Finland</td>
<td>2012</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2012</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>Italy</td>
<td>2015</td>
<td>75%</td>
<td>41%</td>
</tr>
<tr>
<td>Norway</td>
<td>2018</td>
<td>43%</td>
<td>75%</td>
</tr>
<tr>
<td>Denmark</td>
<td>2017</td>
<td>41%</td>
<td>75%</td>
</tr>
<tr>
<td>Germany</td>
<td>2013</td>
<td>75%</td>
<td>41%</td>
</tr>
<tr>
<td>UK</td>
<td>2010</td>
<td>41%</td>
<td>75%</td>
</tr>
</tbody>
</table>
Treatment of separately collected textiles
Treatment of separately collected textiles

**All Collectors**
- Recycled in country: 1%
- Export for reuse/recycling: 29%
- Sold/donated to wholesaler: 15%
- Reuse in country: 13%
- Landfill/incineration in country: 42%

**Charitable/commercial collectors**
- Recycled in country: 21%
- Export for reuse/recycling: 40%
- Sold/donated to wholesaler: 23%
- Reuse in country: 21%
- Landfill/incineration in country: 15%
Treatment of separately collected textiles

<table>
<thead>
<tr>
<th>Brands</th>
<th>(Municipal) waste companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export for reuse/recycling</td>
<td>Landfill/ incineration in</td>
</tr>
<tr>
<td>100%</td>
<td>country 97%</td>
</tr>
<tr>
<td></td>
<td>Sold/donated to wholesaler</td>
</tr>
<tr>
<td></td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>Recycled in country 0%</td>
</tr>
<tr>
<td></td>
<td>Recycled in country 0%</td>
</tr>
<tr>
<td></td>
<td>Reuse in country 0%</td>
</tr>
<tr>
<td></td>
<td>Reuse in country 0%</td>
</tr>
<tr>
<td></td>
<td>Sold/donated to wholesaler</td>
</tr>
<tr>
<td></td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>Export for reuse/recycling</td>
</tr>
<tr>
<td></td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td>Recycled in country 0%</td>
</tr>
<tr>
<td></td>
<td>Reuse in country 0%</td>
</tr>
</tbody>
</table>
The wholesale sector
Imports of used textiles

- **Estonia**
  - Domestically collected
  - Imports

- **Latvia**
  - Domestically collected
  - Imports

- **Lithuania**
  - Domestically collected
  - Imports

The bar chart shows the comparison between domestically collected and imported used textiles for Estonia, Latvia, and Lithuania.
Imports of used textiles

Rank in EU

kg/capita

Estonia
Latvia
Lithuania

Domestically collected Imports

1st
3rd
4th
What happens to imported used textiles?
Key messages
Consumption patterns are relatively sustainable:

- **Consumption of new clothing is low** particularly 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!

David Watson
dw@planmiljoe.dk
What happens to textiles in mixed waste streams?

<table>
<thead>
<tr>
<th>Location</th>
<th>Landfill</th>
<th>Incineration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>34%</td>
<td>66%</td>
</tr>
<tr>
<td>Latvia</td>
<td>97%</td>
<td>3%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>66%</td>
<td>34%</td>
</tr>
</tbody>
</table>

- **Consumption (new plus 2nd hand)**
- **Textiles in mixed waste (mass balance estimate)**
- **Textiles in mixed waste (picking studies estimate)**