



# Preparatory Study on Textile Products

First on-line stakeholder consultation

18 -19<sup>th</sup> March 2024

WEBEX SESSION

## ETIQUETTE FOR VIRTUAL MEETING PARTICIPANTS

- ❖ Please indicate your **NAME, SURNAME** and **ORGANISATION** on Webex
- ❖ **MUTE YOUR MIC AND SWITCH OFF** your **CAMERA** (unless you have the floor)
- ❖ **POST** your **QUESTIONS** in the **WEBEX CHAT** Box. You will be **INVITED** to take the floor to formulate your question **ORALLY**.
- ❖ Please clearly state your name and affiliation the first time you are given the floor.
- ❖ Please note that the (Webex) meeting will be **RECORDED** to help prepare the meeting minutes, but will not be livestreamed or made publicly available for replay. This implies that by participating to the meeting, you grant your permission for the JRC to record the meeting.



# Preparatory study on textile products

1<sup>st</sup> online consultation – Day 2

19 March 2024

# Aim of the meeting

- JRC is supporting the development of the first Delegated Act under the ESPR. Addressing textile apparel.
- Background to this on-line consultation: “Preparatory study on textiles for product policy instruments – 1st milestone”. Shared on 23rd February
- Purpose is to verify the work done to date and to collect additional information and views
- Comments to be provided in writing until April 22nd
- Further developments will be presented in subsequent workshops

Section	Time (duration)	Topic
Log-in and preparation	09:30-09:45 (15 min)	
Market (2of2)	09:50-10:30 (40 min)	Presentation (JRC) <ul style="list-style-type: none"> <li>- Market structure and business models</li> <li>- Characteristics of the value chain</li> <li>- Competitiveness and environmental compliance costs</li> <li>- Lifespan of apparel textiles</li> <li>- Market penetration of environmental labels</li> </ul>
		Questions and Answers
User Behaviour	10:30-11:15 (45 min)	Presentation (JRC) <ul style="list-style-type: none"> <li>- General points</li> <li>- Aspects at several stages</li> </ul>
		Questions and Answers
Break	11:15-11:35 (20 min)	
Current EU Ecolabel criteria	11:35-12:25 (30 min)	Presentation (JRC) <ul style="list-style-type: none"> <li>- Facts and figures</li> <li>- Suggestions for revision</li> <li>- Revision of criteria within the ESPR framework</li> <li>- Synergies with other Ecolabels</li> </ul>
		Questions and Answers
Public procurement and current voluntary EU GPP criteria	12:25-12:55 (30 min)	Presentation (JRC) <ul style="list-style-type: none"> <li>- Public procurement in EU</li> <li>- Current EU GPP criteria and uptake</li> </ul>
		Questions and Answers
Written comments to the working document	12:55-13:00 (5 min)	Presentation (JRC)
Closing remarks	13:00-13:05 (5 min)	(Chair)

# Meeting etiquette

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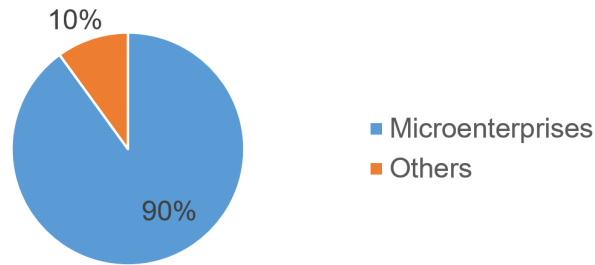
# Market (2 of 2)

- Market structure and business models
- Characteristics of the value chain
- Competitiveness and environmental compliance costs
- Lifespan of apparel textiles
- Market penetration of environmental labels

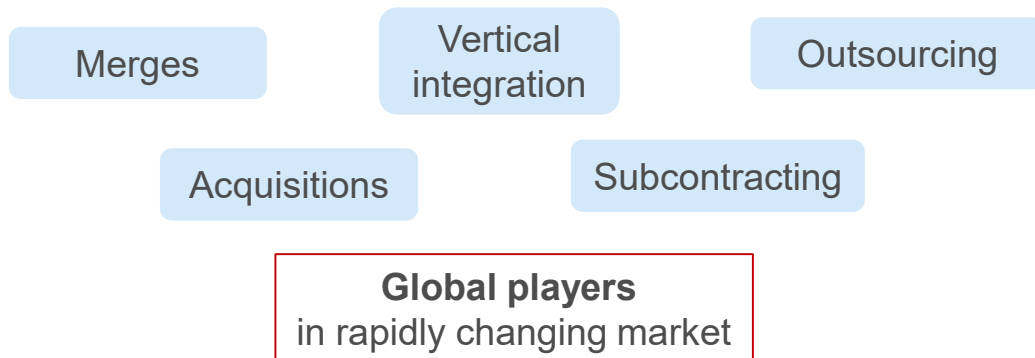
# Market (2of2)

## Market structure and business models

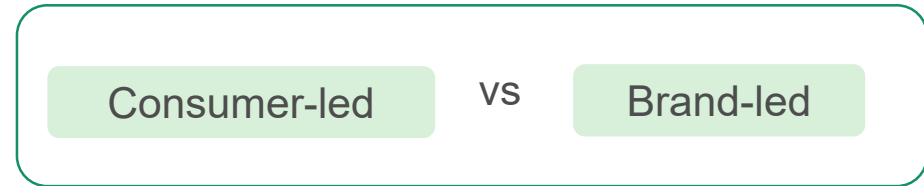
Textile production companies in the EU



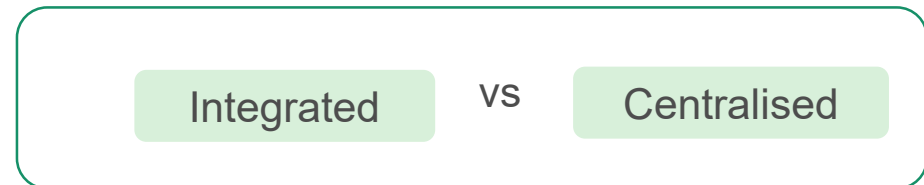
**Large companies** include several or single brands usually supplying several end markets



### Operation model

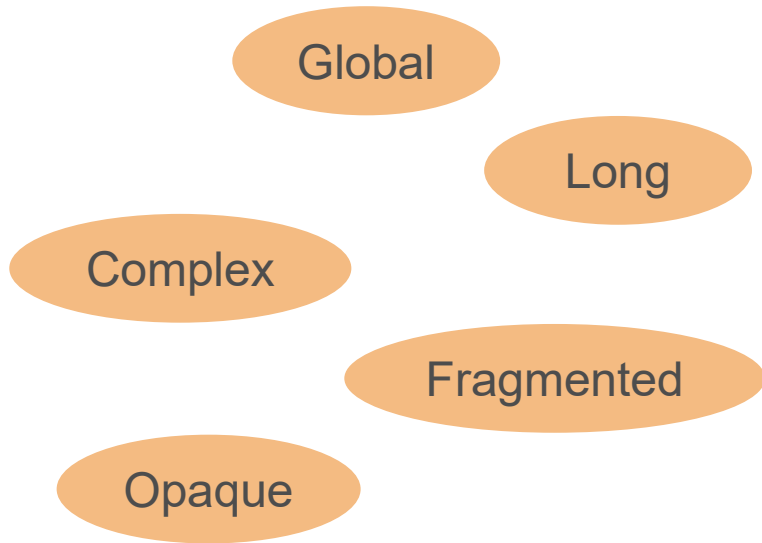


### Approach



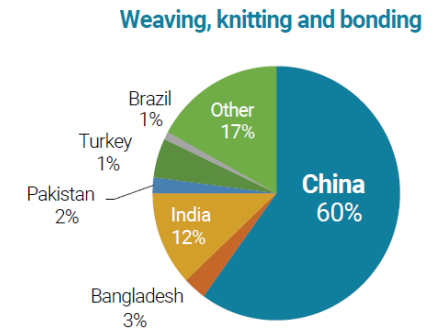
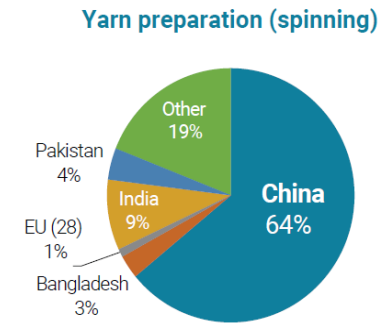
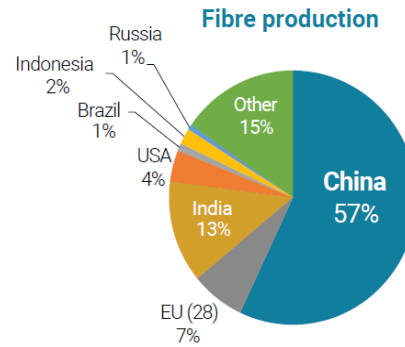
# Market (2of2)

## Characteristics of the value chain

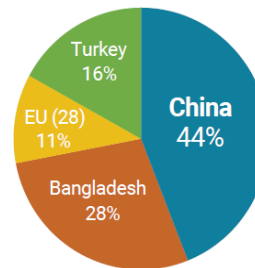


Number of seasons affecting the supply chain

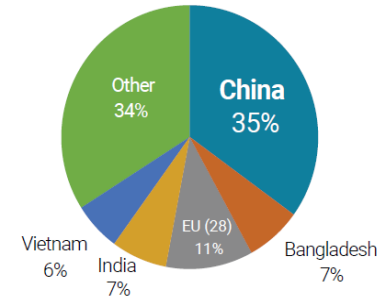
Geographical breakdown of global apparel production and consumption



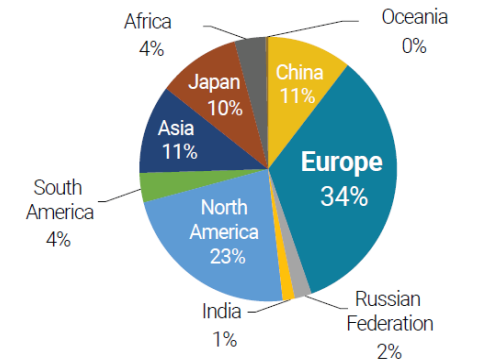
**Bleaching/dyeing and finishing**



**Assembly**



**Consumption**



Source: UNEP (2020)



# Market (2of2)

## Competitiveness and environmental compliance costs

**Table 26.** Environmental aspects covered by the Best Available Techniques (BAT) reference documents (BREFs) for preventing and controlling industrial pollution around the world

Country/organisation Environmental aspects	European Union (EU BREF)	China	India (MINAS)	South Korea	United States (US EPA)	World Bank (EHS Guideline)
Emissions to air	Yes	Yes	No	Yes	Yes <sup>(a)</sup>	No
Emissions to water	Yes	Yes	Yes	Yes	Yes	Yes
Consumption of energy	Yes	No	No	No	No	Yes
Water usage	Yes	No	No	Yes	No	No
Waste generation	Yes	Yes	No	No	No	Yes
Usage and management of chemicals	Yes	No	No	No	No	No
Energy efficiency	Yes	No	No	Yes	No	No
Noise emission	No	Yes	No	Yes	No	No

N.B. MINAS: Minimal National Standard; US EPA: United States Environmental protection Agency; EHS Guideline: World Bank Group Environmental, Health, and Safety Guidelines.

<sup>(a)</sup> Covered by the Clean Air Act, National Emission Standards for Hazardous Air Pollutants (NESHAP) (OECD, 2022).

Source: Ministry of Ecology and Environment, China (2021); OECD (2022).

# Market (2of2)

## Lifespan of apparel textiles

Only estimates available

**Table 27.** Types of lifespans

Type	Definition
Total lifespan	The period during which an apparel textile retains its original form, irrespective of its functional condition.
Service lifespan	The time an apparel textile remains functional and usable, considering its use by both the initial and subsequent owners. This timeframe initiates upon the product's acquisition by the first owner and concludes when the last owner disposes of it.
Possession span	The period of time in which an apparel textile is held by a specific owner. This timeframe does not discriminate whether the apparel textile is used subsequently by another person or it is disposed of.
Duration in use	The period of time a single owner utilises the apparel textile, considering only the use time (i.e. the time it is worn).
Physical lifespan	The period of time an apparel textile can be worn before it exhibits a level of wear beyond what is deemed acceptable.

Source: adapted from Murakami et al. (2010)

Perceived to have  
**decreased by 36%**  
in the last 20 years

# Market (2of2)

## Market penetration of environmental labels

Quantification method  
is missing



# Market (2of2)

## Q&A

1. Are there figures about the **market share** of companies applying specific **business models**?
2. Are there EU figures about **second hand, rental market** and **e-commerce**?
3. Are there **BREF** for *Bangladesh, Türkiye, Pakistan* and *Vietnam*? Can you provide the references of legislation affecting the textile industry in these countries? Are there any studies about them?
4. Can you share information about studies focussing on **lifespan**? Dated and recent studies are relevant.
5. Can you share information about figures on **market penetration of environmental labels**?

# User behaviour

- General points
- Aspects at several stages

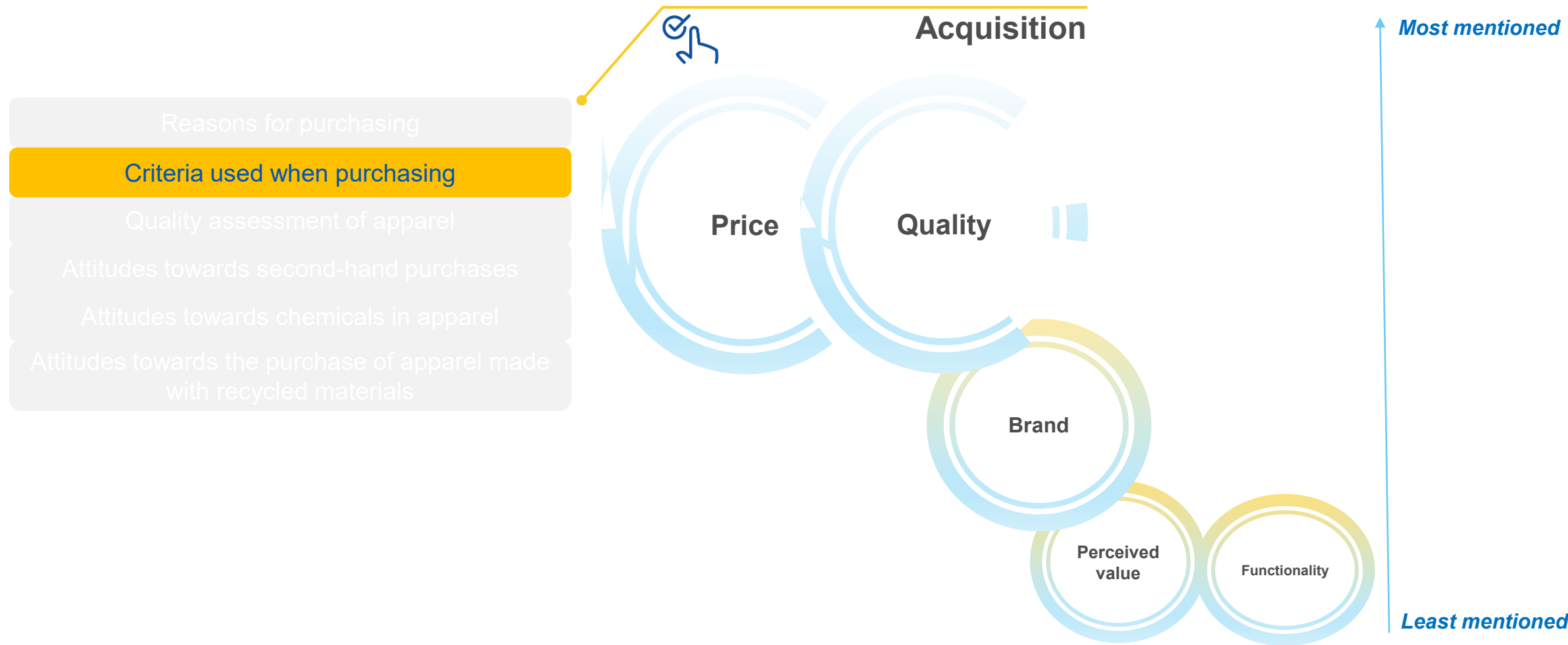
# User Behaviour aspects analysed



# User Behaviour aspects analysed

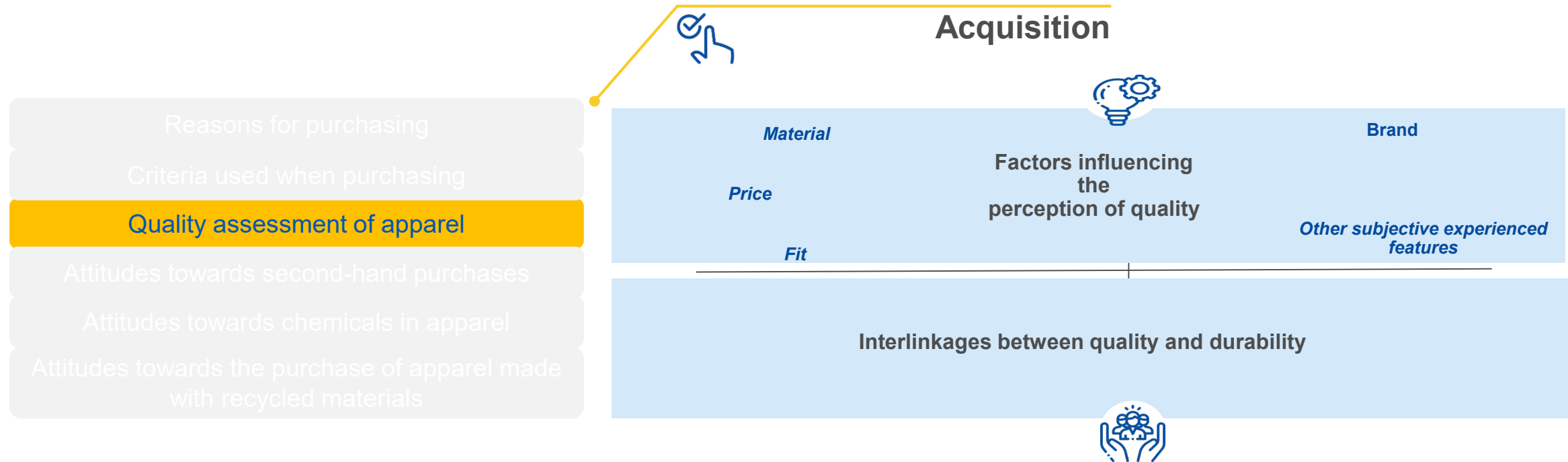


# User Behaviour aspects analysed





# User Behaviour aspects analysed



# User Behaviour aspects analysed

## Acquisition



Reasons for purchasing

Criteria used when purchasing

Quality assessment of apparel

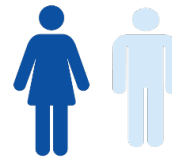
**Attitudes towards second-hand purchases**

Attitudes towards chemicals in apparel

Attitudes towards the purchase of apparel made with recycled materials

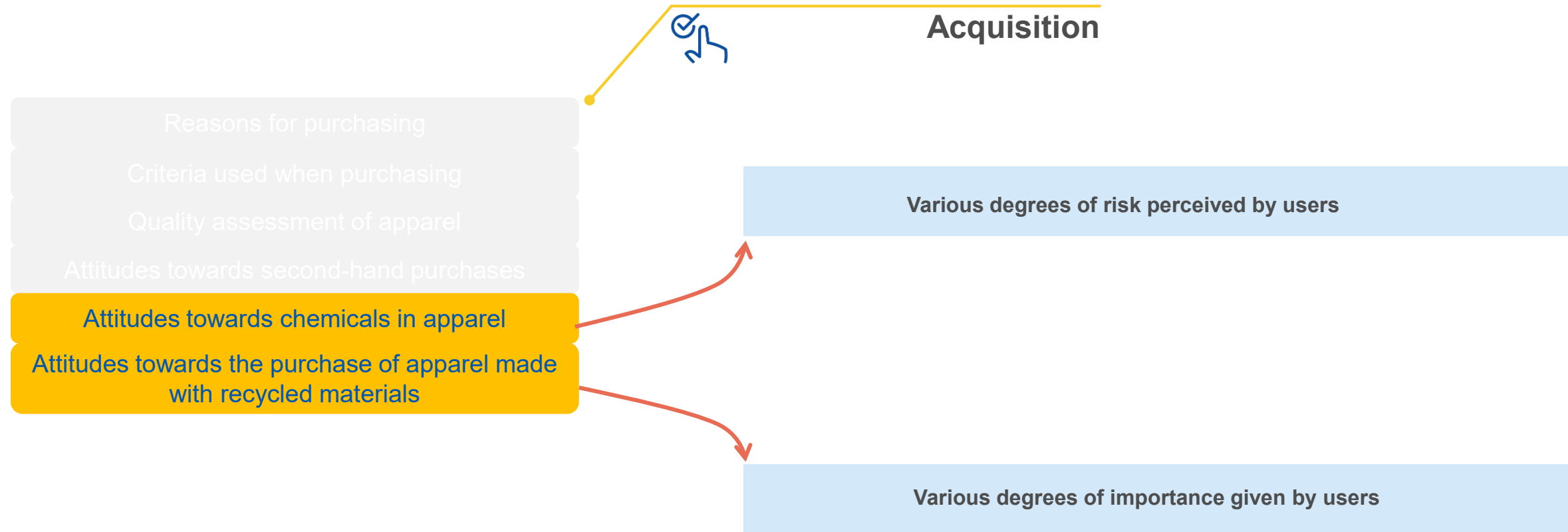


**Growing consumer interest**



**Women and younger population more inclined to purchase second-hand**

# User Behaviour aspects analysed



# User Behaviour aspects analysed



Maintenance

## Laundering practices

Care labels

Reparability

Long-term apparel storage

Sorting based on temperature

40 degrees average washing temperature

Dosing of detergents and softeners often arbitrarily

Natural drying generally used

Ironing practices in decline

Storage after washing and drying

# User Behaviour aspects analysed

Maintenance



## Laundering practices

Care labels

Reparability

Long-term apparel storage

Sorting based on temperature

40 degrees average washing temperature

Dosing of detergents and softeners often arbitrarily

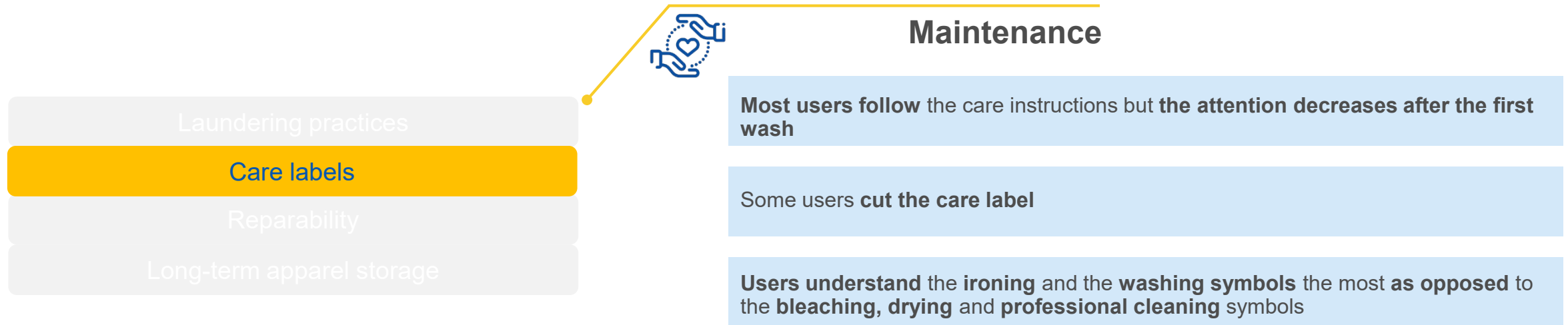
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Ironing practices in decline

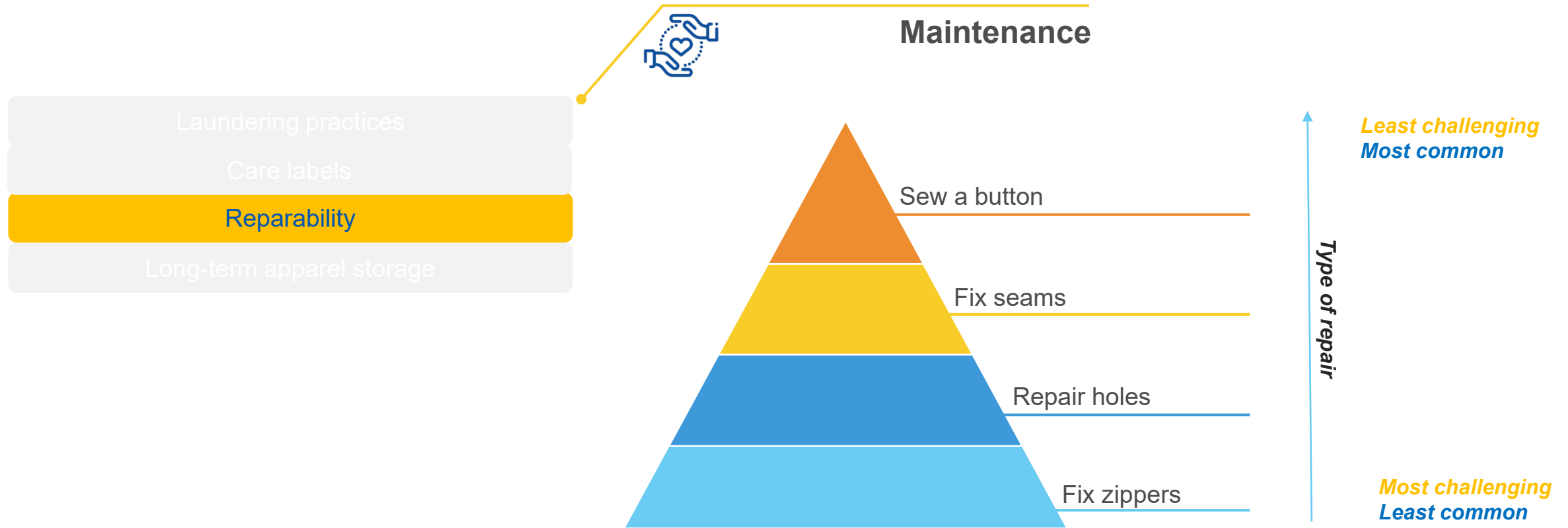
Storage after washing and drying



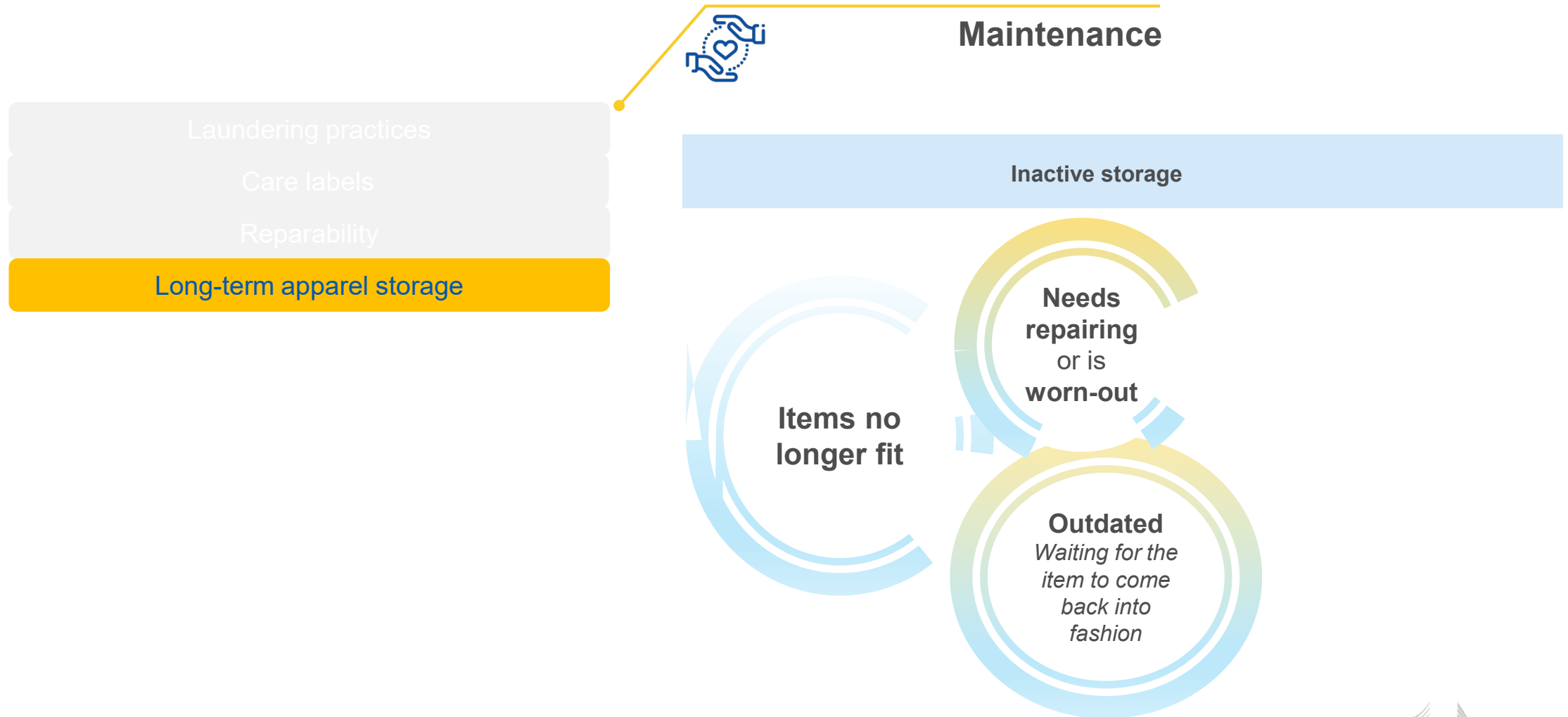
# User Behaviour aspects analysed



# User Behaviour aspects analysed



# User Behaviour aspects analysed





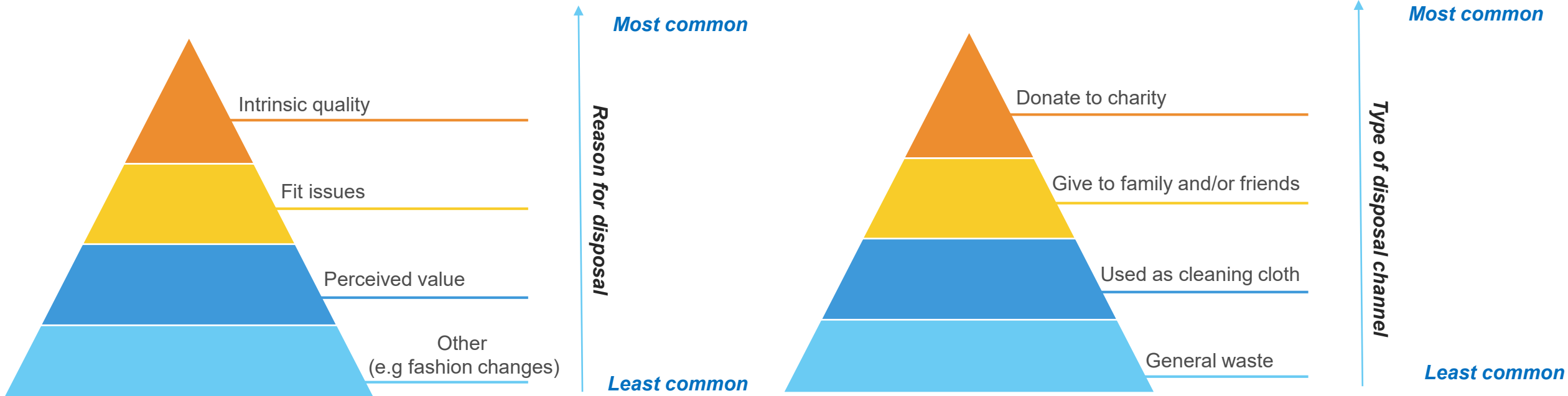
# User Behaviour aspects analysed

Disposal



Reasons for disposal & channels

Reasons for returning apparel



# User Behaviour aspects analysed

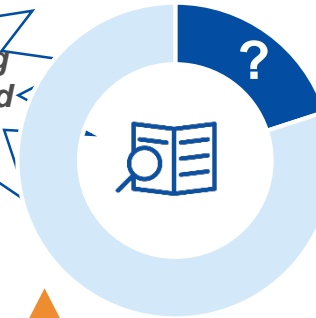
Disposal

Reasons for disposal & channels

Reasons for returning apparel



Colour fading  
Fabric-related  
issues



Most common

Most common

Intrinsic quality

Fit issues

Perceived value

Other  
(e.g fashion changes)

Reason for disposal

Least common

Donate to charity

Give to family and/or friends

Used as cleaning cloth

General waste

Type of disposal channel

Least common

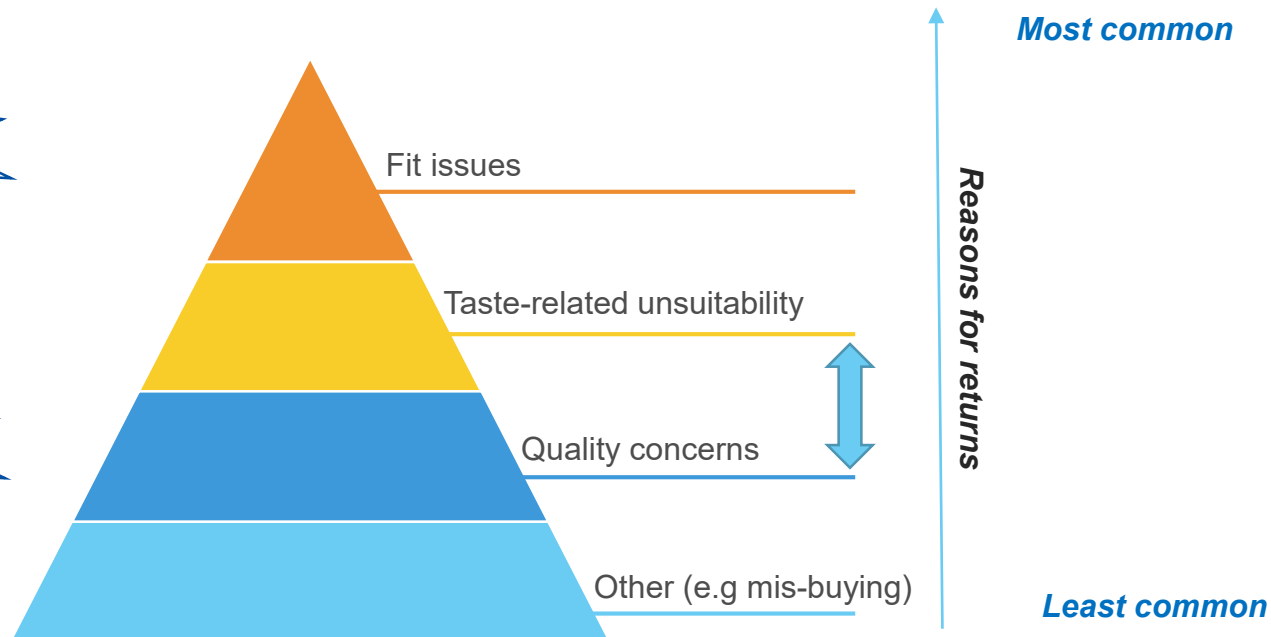
# User Behaviour aspects analysed

Disposal

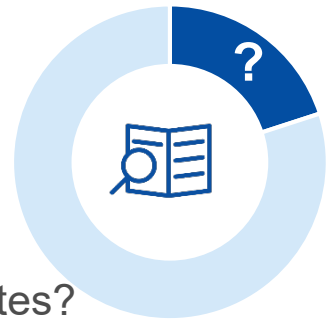


Reasons for disposal & channels

Reasons for returning apparel



# User Behaviour Q&A



1. Are you aware of studies/surveys estimating the **apparel purchase frequency** in different Member States?
2. Are there additional evidence/surveys to **enrich the literature** used related to the user perception of **chemicals** present in apparel? Which are they?
3. Are there additional evidence/surveys to **enrich the literature** used related to the user perception of apparel made with recycled materials? Which are they?
4. Are there additional evidence/surveys related to **users' attention to labels** in general? Which are they?
5. Where can we find studies/surveys on the way users **dose detergents/softeners, store the apparel after washing** and how these practices may **affect the apparel qualities**?
6. Are you aware of studies/surveys analyzing the apparel **conditions** upon **collection from general waste** and/or **second-hand shops**? Which are they?
7. Are you aware of product **design** strategies to **promote user's emotional attachment** to apparel?
8. Are you aware of User Behaviour studies/surveys focused on **specific apparel textile categories**?



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WEBEX SESSION

**BREAK UNTIL 11.35**

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# Current EU Ecolabel criteria

- Facts and figures
- Suggestions for revision
- Revision of criteria within the ESPR framework
- Synergies with other Ecolabels

# Current EU Ecolabel criteria

## Facts and figures

**Table 32.** Figures of types of products awarded the EU Ecolabel for textile products in September 2023

Type of product	Licences		Products	
	Number	Percentage of the total (%)	Number	Percentage of the total (%)
Apparel textiles	27	32	6 947	76
Home/interior textiles	15	18	688	8
Textile cleaning products	14	16	1 012	11
Intermediate products, such as textile fibres, yarns, fabrics and knitted panels	27	32	512	6
Intermediate products, such as non-fibre elements	2	2	4	<1

N.B. The number of licences and products is affected by the reporting methods used by competent bodies. This results in small discrepancies compared to the total statistics.

Source: own elaboration based on data provided by EU Ecolabel Helpdesk

# Current EU Ecolabel criteria

## Suggestions for revision

Simplification of the application process

Facilitation of the retrieval of information  
from non-EU suppliers

Harmonisation with other ecolabels

Use of more third-party certification to  
prove compliance

Inclusion of criteria addressing product  
recyclability and packaging

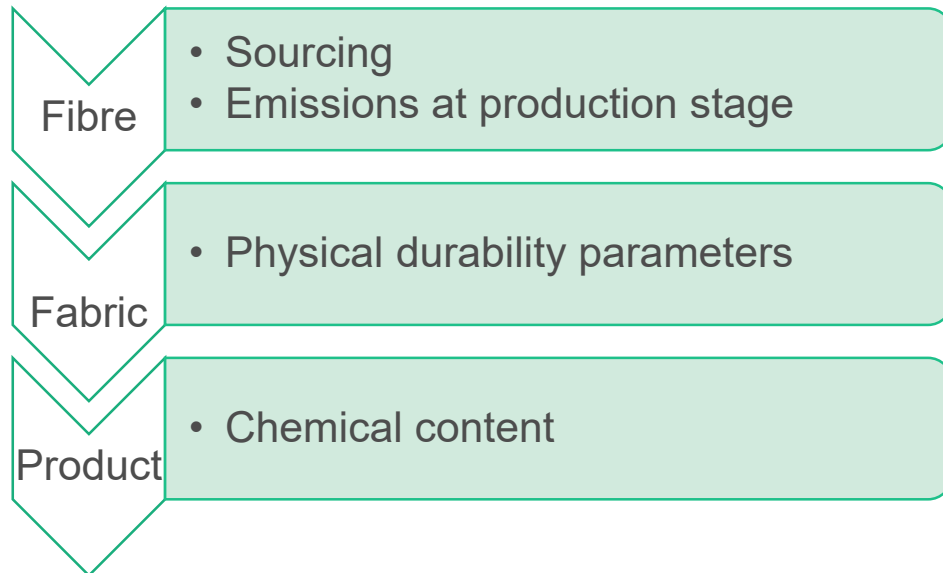
Alignment with requirements set in the ESPR



# Current EU Ecolabel criteria

## Revision of criteria within the ESPR framework

Commission Decision 2014/350/EU



They are not directly linked to the final function of the product



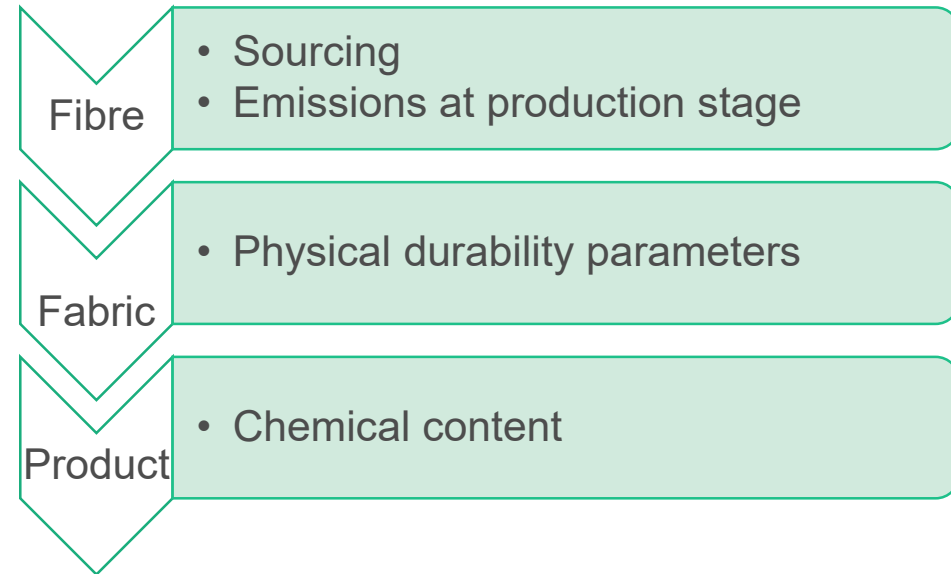
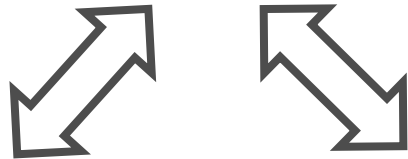
Art. 34(4) of ESPR  
Presumption of conformity

# Current EU Ecolabel criteria

## Synergies with other Ecolabels



Art. 6(f) of Regulation 66/2010



The three Ecolabels use **the same approach**

# Current EU Ecolabel criteria Q&A

Which are your views on the revision of EU Ecolabel criteria in light of the new Ecodesign framework?

# Public procurement and EU Green Public Procurement criteria

# Public procurement in EU

## Monitoring is challenging

### Reporting exercise COM(2021) 245 final

All MS reports contained more **qualitative** information than quantitative data

Analysis at EU level is **limited** by incomplete available data

MS follow different **methodologies** for data collection

Several cases showed **discrepancies** between figures at country level and TED

## Tender Electronic Daily

Information of the public procurement of the European Economic Area

Contract Notice and Contract Award Notice

Public procurer and the seller

Price

Award criteria

Only platform that can be currently used

Tenders above the procurement threshold of EUR 139000

Limitations when using values:

- Price is checked only above EUR 100 million;
- Contract awards include products different from apparel textiles.

# Public procurement in EU

**Table 34.** Number of Contract Awards procuring apparel in the EU

CPV code	2015		2016		2017		2018		2019	
	N	%	N	%	N	%	N	%	N	%
181XXXXX-X Occupational clothing, special workwear and accessories	241	43	285	46	360	43	431	44	533	42
182XXXXX-X Outerwear	61	11	68	11	93	11	93	10	124	10
183XXXXX-X Garments	57	10	60	10	88	11	99	10	138	11
184XXXXX-X Special clothing and accessories	110	20	47	8	97	12	111	11	142	11
351134XX-X Protective and safety clothing	14	3	37	6	50	6	69	7	103	8
3741XXXX-X Sport goods and equipment	7	1	11	2	8	1	10	1	15	1
3581XXXX-X Individual and support equipment	66	12	108	18	133	16	158	16	206	16
Total	556	100	616	100	829	100	971	100	1 261	100

Highest number of Contract Awards:

- France,
- Germany,
- Poland,
- Czechia.

N.B. N: number of Contract Awards. %: Percentage of Contract Awards compared to the total number of contracts related to textile products.

Source: own elaboration based on Tenders Electronic Daily (TED) (csv subset) – public procurement notices <sup>(108)</sup>.

# Current voluntary EU GPP criteria

Useful learnings for mandatory requirements

Unknown uptake

## Suggestions from the questionnaire

- Clear requirements → manufacturers can **meet the demand**,
- Address **premature disposal** due to contracting or budget reasons
- Facilitate verification process for procurers, who are usually not sustainability experts
- Establishing a Life Cycle Costing framework
- Establishing a framework including environmental and social aspects in the whole value chain
- Support public authorities to adopt common strategies of purchasing and disposing

# Public procurement and current EU GPP criteria Q&A

Do you agree with the analysis performed on public procurement? Why?



# Written comments to the working document

# Written comments to the working document

- What is most relevant is the **reasoning** and **evidence** supporting a position, rather than the number of contributions;
- JRC encourages stakeholders to **team up** and send well-argued aggregated comments;
- JRC invites companies to provide comments **via their associations**;
- Registered stakeholders can provide written comments **via a web form (EU Survey)**: link will be shared by email shortly after the meeting;
- The form allows the submission of maximum 10 comments, but stakeholders can submit as many web forms as they wish;
- If you wish to share additional documents, you can send them via email to ***JRC-B5-TEXTILES@ec.europa.eu***

# Written comments to the working document

## The web form

### Details of the stakeholder

	First Name	Last name	Organization	Email address
*				

\*

- My contribution can be published provided that I remain anonymous: I consent to the publication of any information in my contribution in whole or in part (which may include quotes or opinions I express) provided that it is done anonymously. I declare that nothing within my response is unlawful or would infringe the rights of any third party in a manner that would prevent publication.

### 1st comment

---

1. Please report the section number and the line number that your comment refers to.

	Section	Line
*		

1. Please report your comment

*Text of 1 to 5000 characters will be accepted*

*0 out of 5000 characters used.*

1. Do you want to add a comment?

- Yes  
 No

# Written comments to the working document

## The web form

### 5th comment

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5. Please report the section number and the line number that your comment refers to.

	Section	Line
*		

5. Please report your comment

*Text of 1 to 5000 characters will be accepted*

*0 out of 5000 characters used.*

5. Do you want to add a comment?

Yes

No

Your opinion matters to us.

Thank you very much for taking the time to contribute to this consultation.

---

Submit

# Written comments to the working document

## The web form

### 10th comment

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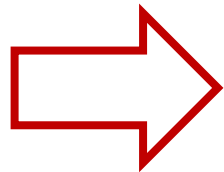
10. Please report the section number and the line number that your comment refers to.

	Section	Line
*	<input type="text"/>	<input type="text"/>

10. Please report your comment

*Text of 1 to 5000 characters will be accepted*

*0 out of 5000 characters used.*



If you want to submit more comments,  
please finalise this form and open a new one.

Your opinion matters to us.

Thank you very much for taking the time to contribute to this consultation.

Submit

# Written comments to the working document Q&A

Any questions?

# Closing remarks

