

**FASHION
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Resources



CIRCULARITY AND ITS OPPORTUNITIES FOR THE INDIAN APPAREL SECTOR

MARCH 2022



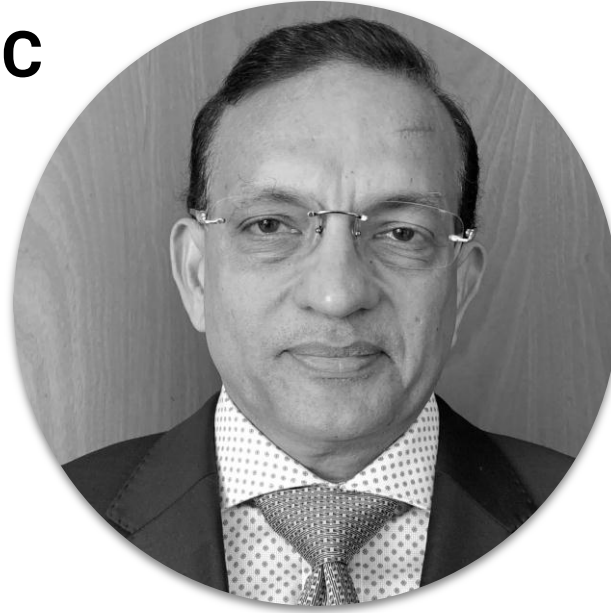


AGENDA MARCH 07TH 4:00 - 5:00 PM IST

- 01** Opening Remarks by the AEPC Chairman
- 02** Circularity and Its Importance for apparel value chain
- 03** The untapped opportunities that pre-consumer textile waste offers to the Indian Apparel industry
- 04** Snapshot of the Sorting for Circularity Project and How AEPC members can participate
- 05** Closing remarks by the AEPC Secretary General
- 06** Q&A session



OPENING REMARKS BY CHAIRMAN, AEPC



SH. NARENDRA GOENKA
AEPC Chairman

SPEAKERS INTRODUCTION



NIN CASTLE

Co-founder and Chief Programs Officer
Reverse Resources



PRIYANKA KHANNA

Head of Asia Expansion
Fashion for Good



MUKUL AGGARWAL

Chief Sustainability Officer,
Birla Cellulose



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03

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Q&A session

WHAT IS CIRCULARITY?

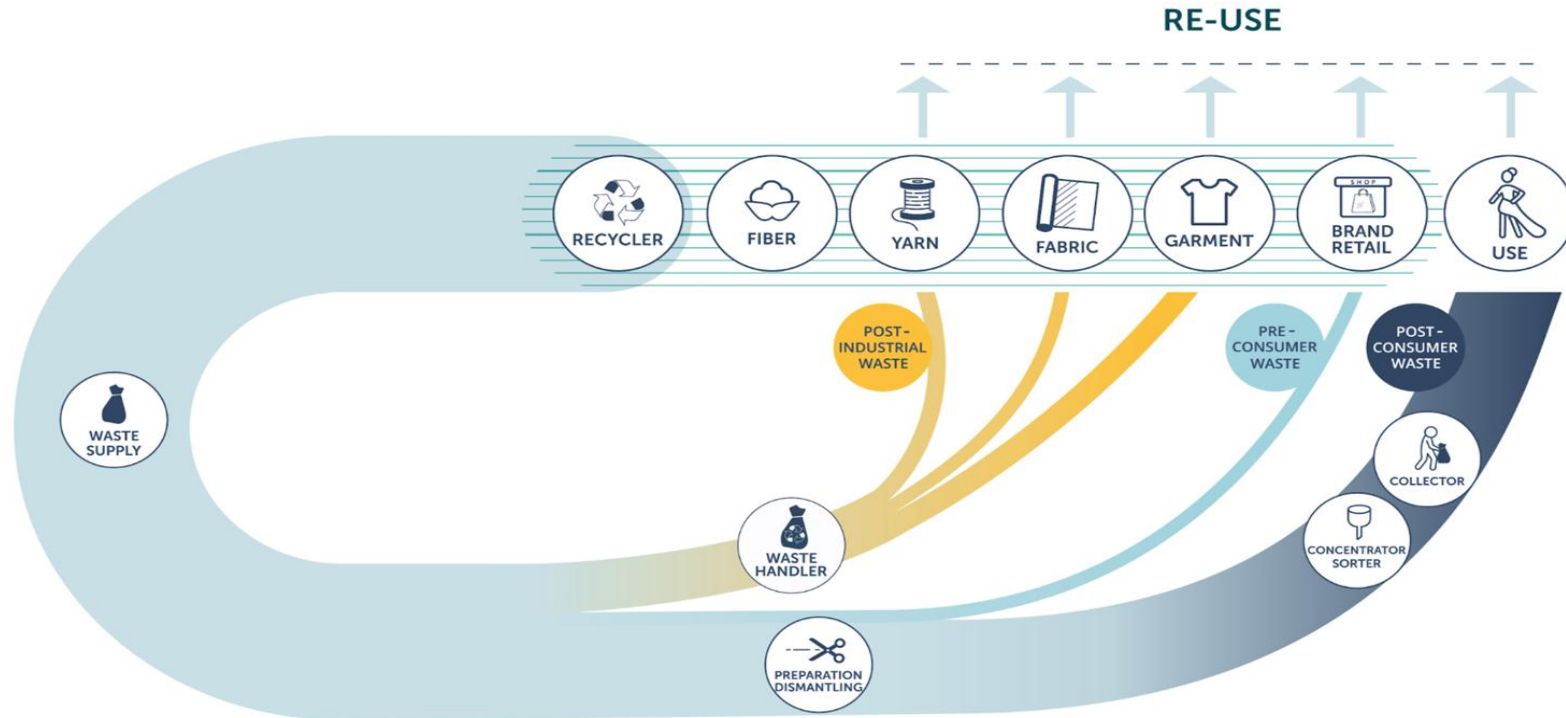
LINEAR VS CIRCULAR SUPPLY CHAINS

Current Linear Supply Chain



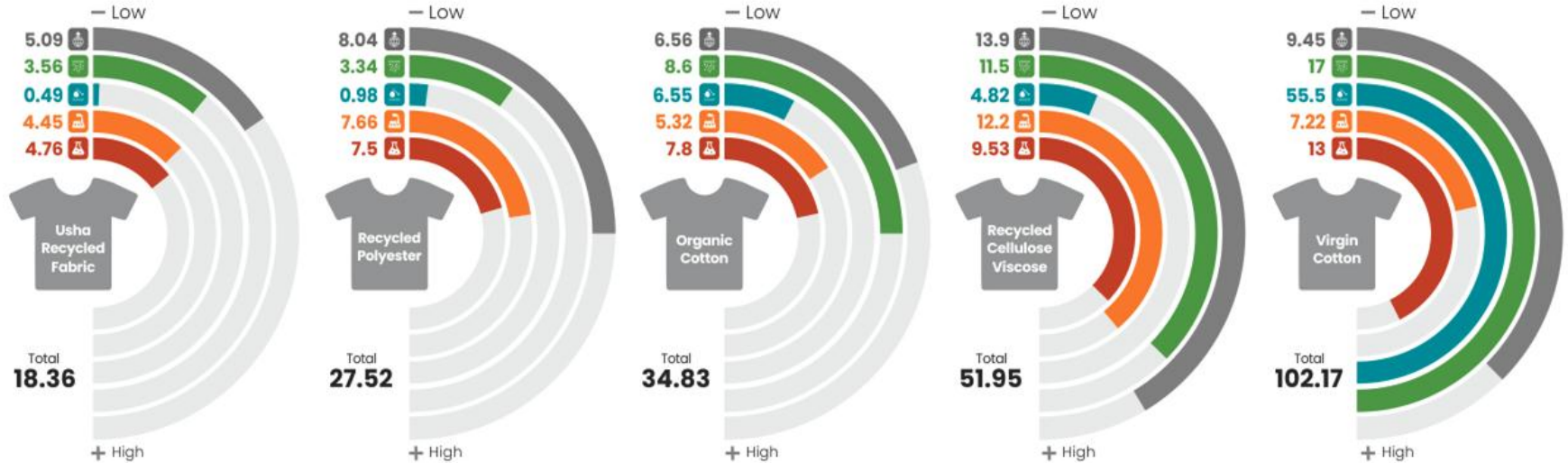
WHAT IS CIRCULARITY?

LINEAR VS CIRCULAR SUPPLY CHAINS



WHY IS CIRCULARITY IMPORTANT?

SUSTAINABILITY



Example: Usha Yarns' Score on the Higgs' Index Sustainable Material Impact Meter

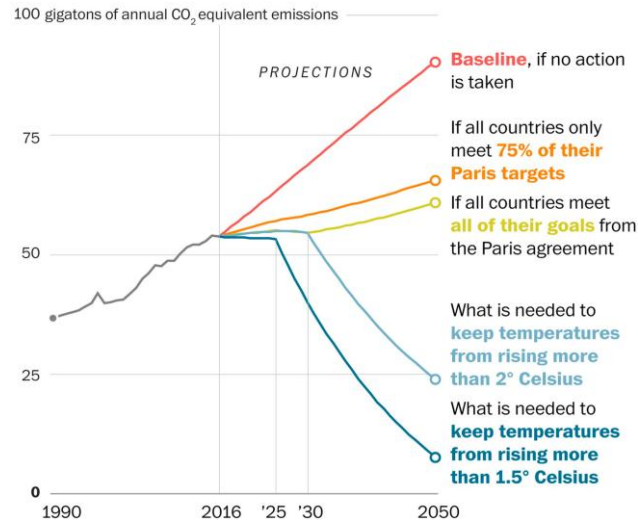
WHY IS CIRCULARITY IMPORTANT?

BRAND DEMAND



Emissions targets to cool a warming planet

Even if all countries hit their targets under the Paris agreement, global carbon dioxide emissions will still far exceed what is needed to keep temperatures from rising above 1.5 or 2 degrees Celsius.



Data is based on scenarios from Climate Interactive.

Source: Climate Interactive

THE WASHINGTON POST



SORTING FOR CIRCULARITY INDIA

BRAND PARTNERS



LEVI STRAUSS & CO.



ARVIND



VERTICALLY INTEGRATED COMPANY'S TESTIMONIAL ON NEED FOR CIRCULARITY



ADITYA BIRLA GROUP



Birla Cellulose
Fibres from nature



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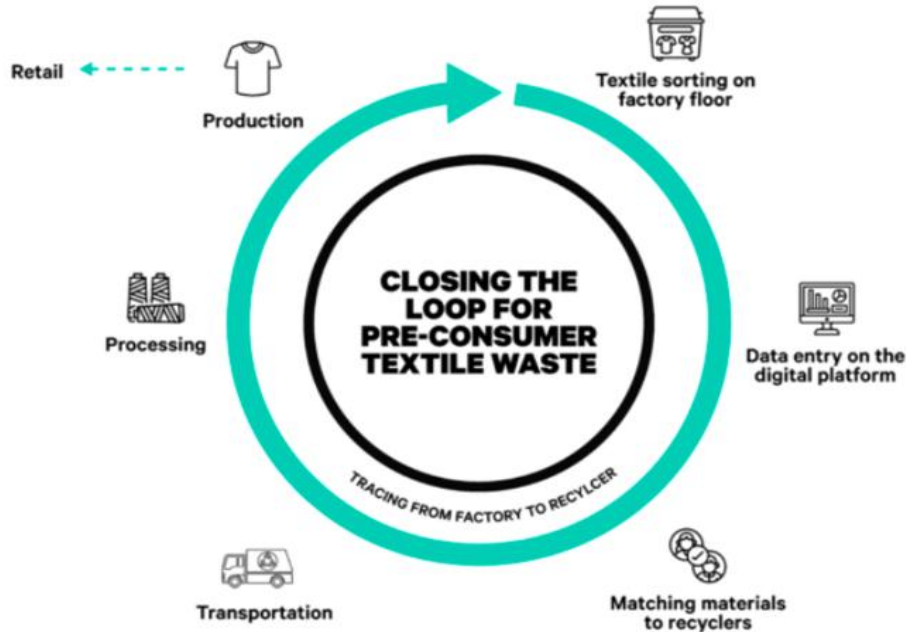
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THERE IS A HIGH VOLUME OF POST AND PRE CONSUMER WASTE IN INDIA, WHICH IF MAPPED AND SORTED, CAN



A) Be used as quality feedstock for recycling technologies

B) Promote a circular textile value chain by closing the loop

RECYCLING TECHNOLOGIES AND THEIR POTENTIAL IN RELATION TO INDIAN TEXTILE INDUSTRY



RECYCLING TECHNOLOGIES AND THEIR POTENTIAL IN RELATION TO INDIAN TEXTILE INDUSTRY



- **Fibre-to-Fibre Mechanical Recycling (Cotton)**
- **Thermo Mechanical (Synthetic)**
- **New Generation Mechanical Recycling**

RECYCLING TECHNOLOGIES AND THEIR POTENTIAL IN RELATION TO INDIAN TEXTILE INDUSTRY



Regenerative (aka Chemical Recycling)

- Cellulosic
- Synthetic
- Blends

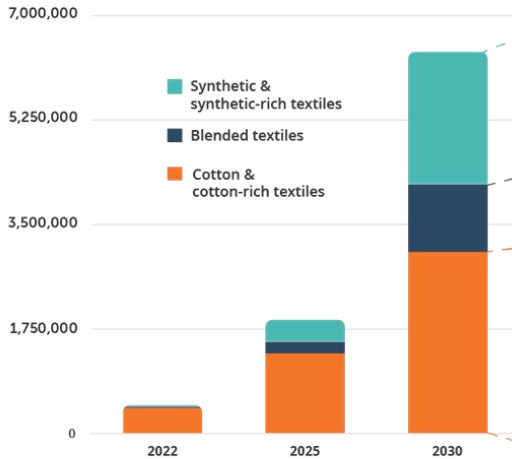
RECYCLING TECHNOLOGIES AND THEIR POTENTIAL IN RELATION TO INDIAN TEXTILE INDUSTRY



**Others:
Recycrom / Natural
Fiber Welding**

RECYCLING TECHNOLOGIES AND THEIR ESTIMATED SCALING PLANS IN 5 YEARS

Estimated installed capacity of global fibre-to-fibre recycling



REDEFINING TEXTILE WASTE AS RESOURCE





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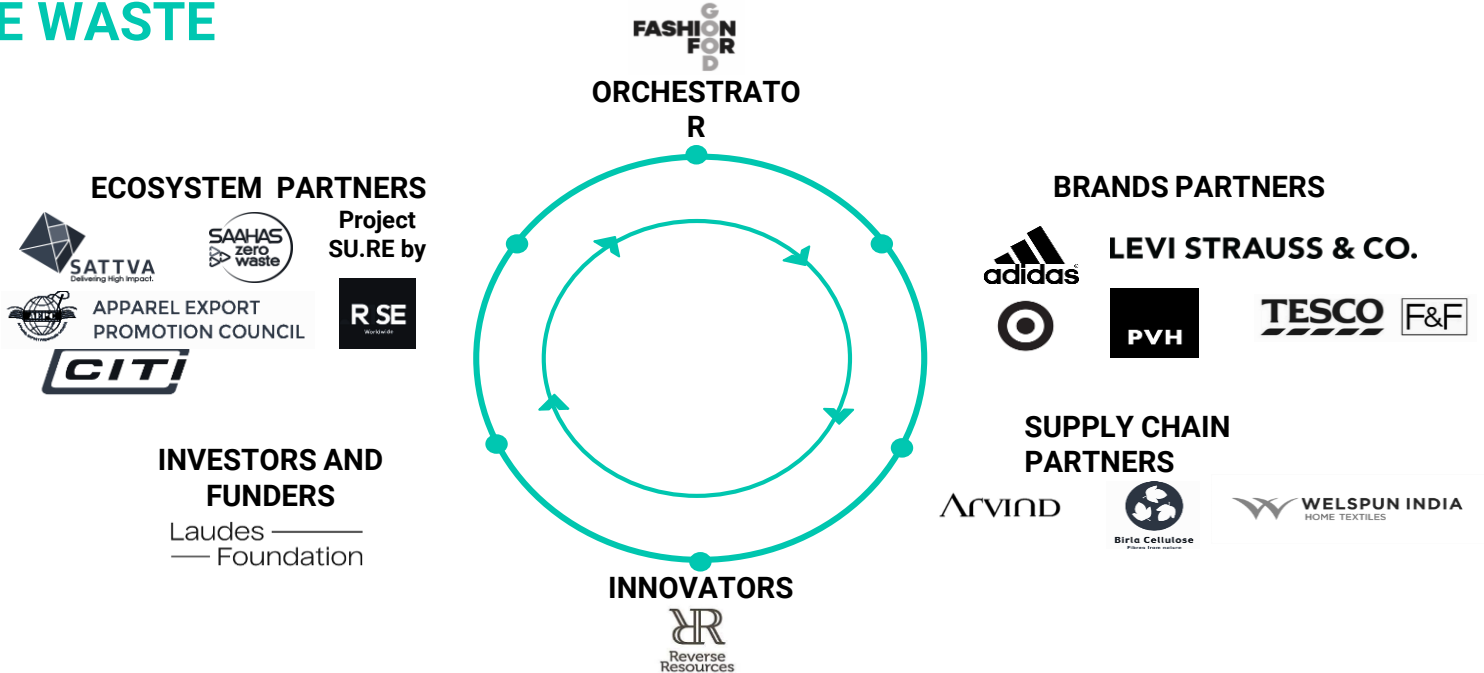
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SORTING FOR CIRCULARITY INDIA PROJECT BRINGS TOGETHER THE KEY ACTORS TO CLOSE THE LOOP ON TEXTILE WASTE



INVESTORS AND FUNDERS
Laudes ———
—— Foundation

Sorting technology + Recyclers (Mechanical & Chemical)

SORTING FOR CIRCULARITY INDIA

PROJECT OBJECTIVES

- 1 Understand the **current textile waste material flow in India**, including flows (volumes, categories, values) of textile waste i.e. a) pre-consumer b) post-consumer domestic c) post-consumer imported
- 2 **Identify technologies** that can assist in **mapping and sorting of the pre and post-consumer waste** to address the textile waste challenges in India
- 3 **Pilot the solutions** to prove the efficacy of the technologies identified
- 4 Build a roadmap for the **implementation** of these solutions along with **brands, manufacturers, recyclers and other stakeholders**

TEXTILE WASTE MAPPING STUDY OVERVIEW

Understanding The Textile Waste Landscape Of India



Material Types

Material Quantities

Material Composition

Existing Supply Chain

Waste Handlers

Sorters and Collectors

Geographical
Distribution

Challenges and
Opportunities

TEXTILE WASTE MAPPING STUDY

OBJECTIVES OF PRE CONSUMER WASTE STREAM

1 **Focus on pre consumer textile waste** while having access to waste data coming from Manufacturing Units

2 **Consolidate and analyse the collected data** with the support of Reverse Resources survey link

3 Understand the **current pre consumer textile waste material flow in India**, including volumes, compositions, types, values, stakeholders involved and their challenges as well as opportunities

4 Create **a report with insights** to be shared with the larger industry and assist in **identifying the relevant technologies, stakeholders and regions** for future pilots



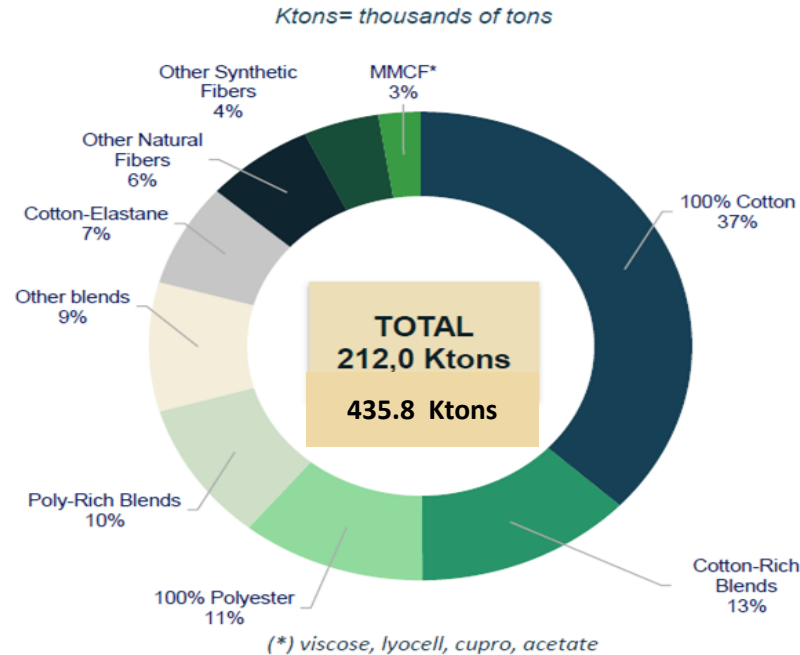
AEPC MEMBERS' PARTICIPATION IN TEXTILE WASTE MAPPING STUDY

Take a short and simple waste survey; will not take more than 15-20 minutes to fill in if you have all the information available

- 1 Survey is designed to collect all necessary information about what textile waste is generated in your operations and how it is managed
- 2 Will help us understand the **types, volumes and handling processes and the challenges** faced in the textile waste landscape
- 3 Data collected will be subject to full confidentiality within the scope of the project activities and will only be used in aggregated form; individual information or private data will not be shared out

Strictly Confidential

MANUFACTURER SURVEY TO AID UNDERSTANDING OF TEXTILE WASTE GENERATION BY FIBRE





SNAPSHOT OF THE MANUFACTURER SURVEY

What is manufactured in your facility?

Select

What is the monthly average production volume of ?
Please write down the actual production volume (last month or average of 3 last months if it fluctuates a lot), not potential capacity.

PRODUCT	VOLUME	UNIT

What are the most common compositions of fiber or fabric running through the production on a regular basis?

MATERIAL	SHARE %

How much waste do you generate from your facility / production unit per month on average?
If no accurate data is available, please provide a rough estimate of minimum you could provide to recyclers.

MATERIAL	VOLUME

Total: 0 kg



SNAPSHOT OF THE MANUFACTURER SURVEY

How do you usually dispose of waste currently?

WASTE TYPE	DISPOSAL METHOD	SHARE % FOR TYPE
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If you sell your waste, what's the average price (with currency)?

How much waste could you potentially store in your premises?

 tonnes

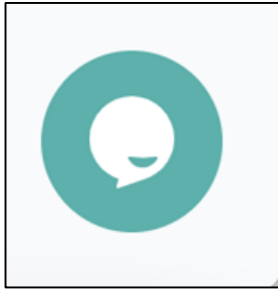
How often do you prefer a collector pick up the waste from the facility on a regular basis?

After every days

Which of the waste management and preparation steps are possible to be done by your facility or will become available within next 3 months?

Select

TECHNICAL SUPPORT FOR MANUFACTURER SURVEY



Chatbox functionality available during working hours of the day. In case of any queries or troubleshooting required, please utilize this feature

Please fill out the form below and we will get back to you as soon as possible.

* Name

* Email

* Message



ACCESSING THE MANUFACTURER SURVEY

A survey link with tutorial video will be shared via email **today**

Request you to fill and complete the survey link. The deadline is March **14th**



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VOTE OF THANKS BY SEC. GENERAL, AEPC



Dr. L B SINGHAL
Secretary General AEPC



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QUESTIONS AND ANSWERS SESSION

THANK YOU