Rethinking Fashion and Textiles for 2030
Summary of the talks presented in the fourth Open Session of the 80th ICAC plenary

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Introduction
Seven distinguished speakers delivered talks on the theme: Rethinking Fashion and Textiles for 2030. Mr. Suresh Kotak from India spoke about the versatile benefits of cotton and its utilization in textiles, the food industry, rural economy, and the environment. Mr. Ilkhom Khaydarov from Uzbekistan discussed how his country transformed from cotton to the textiles value chain and presented the future strategy of doubling their textile exports. Ms. Natalia Isaeva from Russia highlighted the advantages of commercial laundry for managing textiles and its positive impact on sustainability. Dr. Tanveer Hussain from Pakistan explained the Sustainable Development Goals and the role of textiles in circularity. Dr. Olivier Zieschank from ITMF discussed the major challenges in sustainability, including creating cooperation among the entire supply chain and recycling. Dr. Lilac Osanjio from Kenya discussed the importance of capacity building from design to manufacturing and marketing for the growth of African fashion and textiles entrepreneurs. Ms. Belinda Edmonds from the African Cotton Foundation presented on the importance of policy for the development of textiles and apparel value chain in Africa.

In 2021, the global textile industry experienced a significant milestone, with textile exports surpassing $900 billion for the first time in history. This growth has highlighted the potential of textiles for member governments, leading the International Cotton Advisory Committee (ICAC) to introduce textiles as a full-time subject and hire its first-ever head of textiles.

To support the industry's continued growth, the ICAC has developed a textiles strategy that aims to connect the entire value chain, from fibers to high value-added products, and allied industries such as machinery, dyes, and chemical manufacturing. The strategy includes the development of a Business to Business (B2B) portal that will feature country profiles and facilitate business opportunities across the global textile industry.

Additionally, the ICAC has proposed the establishment of an International Textiles Research Council, subject to approval by the Steering Committee. This initiative would provide resources and support for research and development in the industry, further promoting its growth and development.

The ICAC's proactive approach to supporting the global textile industry's growth is promising, and these initiatives have the potential to make a significant impact on the industry in the years to come.

Versatile Cotton Fibre:
A Composite Economy

Mr. Suresh Kotak
Chairman, Textile Advisory Group, India’s Textile Ministry

Mr. Suresh Kotak has more than 65 years of experience in the cotton and textiles industry, especially commerce, economics, and education. He served on the ICAC’s Private Sector Advisory Panel for many years as Government of India’s nominated representative. Mr. Kotak currently serves as Chairman of Textile Advisory Group (TAG) in India’s Textile Ministry and has established the Suresh Kotak International ADR Centre at Indian Merchant’s Chamber in Mumbai. He has served as the President of International Chamber of Commerce (India Chapter), Director of International Cotton Association, and President of Cotton Association of India.

The theme of "Rethinking Fashion and Textiles for 2030" is highly futuristic and aligned with the future of the industry. It’s a positive step that the ICAC has introduced textiles as a full-time subject and taken a step towards promoting the growth and development of the industry. Cotton has a complete upstream and downstream value chain and numerous environmental advantages.

While there are criticisms of cotton due to the use of pesticides and fertilizers, the cotton sector has successfully addressed these issues. Additionally, cotton has one of the highest potentials for carbon sequestering and is often grown without irrigation in rainfed areas. Organic cotton technologies can make cotton even more environmentally friendly, and there has been past research on colored cotton, which could be highly beneficial for the sustainability of the textiles value chain if made commercially viable.
One of the unique advantages of cotton is its biodegradability and circularity. Two-thirds of the weight of seed-cotton is cotton seed, which can be utilized for a long list of products, such as edible oil, linters, animal feed, and materials for other industrial purposes. Many organizations, such as CIRCOFT and Cotton Incorporated, have been working on the seed’s application in industrial and food sectors.

The functional properties of cotton also enable it to blend well with other fibers, increasing its functional properties. Cotton has a significant economic impact on many countries and can play an essential role in the environment, social, and economic development of many regions and countries. Overall, cotton is a versatile fiber with a composite impact, and it’s important for the world to understand its significance for sustainability and the development of the textiles industry.

Uzbekistan Textile Industry Strategy for 2030

Mr. IlKhom Khaydarov
Chairman, Uzbekistan Employers Association

Mr. Ilkhom Khaydarov started his career in cotton as a Deputy Director at the State Foreign Trade Company “Uzprommashimpeks” of the Ministry of Foreign Economic Relation of Uzbekistan in 1992. Then he worked as a Director for the Joint Uzbek-Swiss Marketing company UZDUN A.G. in Geneva, Switzerland and held several positions at Ministry of Foreign Economic Relation of Uzbekistan, Embassies of Uzbekistan for Benelux countries and Ukraine and Uzbekistan Association of Textile and Garment Industry “Uzbektextileprom”. Mr. Khaydarov now serves as Chairman at the Uzbekistan Employers Confederation.

Uzbekistan has a rich history in cotton and textiles dating back to the early 19th century, with the establishment of the first cotton ginning factory in 1922. Over the years, many textile factories and educational institutes were established, making Uzbekistan a strong player in the industry.

In 2017, Uzbekistan introduced the cluster approach, which made the textile industry more competitive. Since early 2022, the Uzbekistan textiles sector has emerged as a sustainable and reliable textile sourcing hub, achieving several milestones in the process. Uzbekistan has shifted from being one of the world’s largest cotton exporters to an exporter of finished products. The country also received the GSP+ status from the European Union, lifted cotton restrictions, and increased textile exports to $3 billion.

Uzbekistan has introduced state-of-the-art technologies and high production techniques in spinning, dyeing, and finishing systems, making garments factories more cost-effective with modern quality control systems. The textiles industry is currently operating at 100% capacity, and textile exports have reached $3.2 billion. Uzbekistan has invested $3.5 billion in textiles, and 450,000 people are directly employed in the sector.

Uzbekistan has implemented traceability procedures from field to customers’ shelves, particularly for organic cotton. Since this year, the Better Cotton Initiative has been introduced in nine clusters, incorporating circularity in pre- and post-textile operations. Uzbekistan has also initiated low water utilization programs in cotton farming, with already 200,000 hectares under this program.

Kyrgyzstan, Kazakhstan, Tajikistan, and Azerbaijan have requested support in cotton cultivation, with Azerbaijan also seeking assistance in developing its textiles industry. Uzbekistan is fast becoming a hub of textiles, with an export target of $5 billion for the next year. This target may be achievable due to energy competitiveness and efficient human resources. Uzbekistan’s strategic location allows it to be within 14 days from Europe by road, within 4 days from Pakistan and from there into open sea, and 7 days to China.

The Uzbekistan government is providing duty-free access to CIS, UK & EU, direct support in transportation, certifications and exhibitions, and availability of organic cotton. Several Uzbekistan brands are prioritizing digitization, utilizing blockchain and barcode systems. Additionally, the government is planning to invest in green electricity.

The strategy for 2026 is to enter the global supply chain through guaranteed sustainability and transportation. Uzbekistan is also planning to utilize non-cotton fibers such as polyester and viscose. The strategy for 2030 is to work on water and soil management, organic and better cotton in agriculture to make cotton more sustainable. The textiles and fashion industries will focus on environment, social aspects, governance, transparency, and traceability to make the industry more sustainable.
How to Move From a Traditional to a Sustainable Model in Industrial Laundry

Ms. Natalia Isaeva
Executive Director, Cotton Way

Ms. Natalia Isaeva is Executive Director of Cotton Way, the leading Russian laundry company. Cotton Way was the first to offer a sustainable model of complex rental and laundry service in Russia. Natalia has been working in the field of corporate finance, bank lending and anti-crisis management for over 20 years. With her vast economic experience, she joined Cotton Way in 2019 to oversee sustainable business processes in the company. As the Executive Director, Natalia leads the team and plays a decision-making role in the company. Her key areas of responsibility include anti-crisis management, restructuring of troubled financial flows and debt obligations, and, most importantly, the ESG agenda and strategy.

Cotton way is a company that places extensive focus on sustainability and has been working on sustainable development for some time.

The company has nine processing facilities located in different regions and can process up to 400 tons per day. Cotton way provides bed linen and terry products to a range of customers, including railways, public and private hospitals, hotels, and manufacturing enterprises.

Sustainability is at the core of Cotton way's business model, and the company has successfully executed sustainable practices that have resulted in substantial reductions in major costs and environmental indicators.

As a large-scale business, Cotton way has made significant investments that have had a positive impact on overall sustainability. For example, the company has reduced water consumption by half, achieved a ten-fold reduction in energy use, and an 88% reduction in CO2 emissions.

These sustainability measures have allowed Cotton way to provide a quality product and service while also achieving cost savings.

Overall, Cotton way’s commitment to sustainability serves as an example of how businesses can prioritize sustainability without sacrificing quality or profitability.

Sustainable Development Goals and Textile Circular Economy

Dr. Tanveer Hussain
Professor of Textile Engineering, Rector, National Textile University, Faisalabad, Pakistan

Dr. Tanveer Hussain is Professor of Textile Engineering and Rector at National Textile University, Faisalabad, Pakistan. He got his PhD in 2004 from Heriot-Watt University, United Kingdom. His current areas of research include Functional Textiles and Sustainable Textiles. He is Fellow of the Textile Institute, UK and has published more than 150 research papers in peer-reviewed journals. He has been awarded several research grants from the Higher Education Commission of Pakistan and has won various awards including Gold Medal in BSc. Textile Engineering, Bronze Medal from the Society of Dyers and Colorists, UK, and Best University Teacher Award from the Higher Education Commission, Pakistan. Previously, he has served at various positions at National Textile University including Head of Textile Processing Department, and Dean Faculty of Engineering & Technology.

As of 2022, the world population is 8 billion and is expected to increase to 8.5 billion by 2030. Textile and clothing exports in 2021 amounted to $871 billion, and it is projected to increase to $930 billion based on various macroeconomic factors.

The segment-wise breakdown of textile exports is as follows: silk (fiber, yarn, and fabric) was valued at $1.4 billion, wool at $10.9 billion, cotton at $60.4 billion, other vegetable fibers at $5.4 billion, manmade filaments at $51.2 billion, manmade staple at $35.5 billion, wadding and nonwoven at $31.6 billion, carpets at $17.7 billion, special woven at $12 billion, coated fabrics at $27.2 billion, knitted fabric at $40 billion, knitted apparel at $262.9 billion, woven apparel at $227 billion, and made-ups at $87 billion.

The world’s fiber consumption is approximately 110 million tons per annum, with polyester having the major share of 57.7 million tons, accounting for 52% of the entire fiber production, while cotton is 23% of the total fiber production and consumption. By 2030, the world’s fiber production is expected to increase to approximately 146 million tons, depending on recycling and circular economy efforts.

Approximately $400 billion worth of textiles and clothing are wasted worldwide, which is enough to meet the Sustainable
Development Goals of 59 of the world’s poorest countries. This highlights the need for increased efforts towards sustainability and circular economy initiatives in the textile industry.

Globally, approximately 48 million tons of clothing are disposed of each year, equivalent to 45% of the world’s fiber production. Shockingly, 73% of clothing waste is landfilled or incinerated annually, and the amount of waste may reach 65 million tons if no action is taken to reduce textile waste.

Textiles dyeing and processing consume 5.8 trillion liters of water each year, enough to supply 530 million people with water for nearly a year. Furthermore, the textiles and fashion industry emit 3.3 billion tons of CO2 annually, requiring the planting of 22 billion trees each year to offset the impact on climate change. Approximately 20% of the world’s water pollution is caused by textiles wet processing, equivalent to the size of 3.7 billion Olympic swimming pools.

Given the above facts, sustainable development is crucial, defined as "meeting the needs of the present without compromising, but rather contributing to, the ability of future generations to meet their own needs." In textiles and apparel, sustainability is defined as "producing and consuming textiles and apparel in such a way that enough raw materials and other resources remain available for future generations without harming people and the planet." In essence, we must take care of people, planet, and profits to ensure a sustainable future for all.

There are 17 Sustainable Development Goals with 159 targets. The first SDG aims to end poverty in all forms and from everywhere, and the textiles and clothing industry can contribute to this by creating new jobs, increasing workers’ minimum pay, providing workers with social security, introducing workers’ share in businesses, and offering workers life insurance.

Globally, nearly 800 million people, or 1 in 9, suffer from hunger every day, according to the World Food Program. Therefore, increasing cotton area is not an option; instead, we must focus on increasing cotton yields and sparing lands for food crops to ensure food security.

The third SDG aims to ensure good health and well-being, and textiles can contribute by producing medical and healthcare textiles, personal protective equipment, and reducing the use of hazardous chemicals. About 200 million children are out of school globally, and by 2030, only 60% of young people will complete upper secondary education. Therefore, the textiles industry can contribute to quality education by providing free daycare centers, building free schools, and offering scholarships for workers’ children.

To achieve gender equality, the textiles sector can increase the ratio of female workers and promote more women to senior management positions. To contribute towards clean water and sanitation, the textiles sector can focus on treating, reducing, and reusing effluents, as 3 in 10 people lack access to clean water, and 80% of industrial wastewater is discharged into rivers without treatment.

The 7th Sustainable Development Goal is to ensure affordable and clean energy, and the textiles sector can contribute to this goal by increasing the use of renewable energy sources and improving energy efficiency. As energy production is a major contributor to climate change, accounting for around 60% of global greenhouse gas emissions, it is crucial for the textile industry to transition to more sustainable energy sources.

To ensure decent work and economic growth, the textile industry must prioritize technological innovation and upgrades, pay workers equally for work of equal value, ban forced labor and child labor, and ensure that all workers have access to a safe working environment and full labor rights. The industry must also invest in research and development, support indigenous technology development, and improve workers’ access to information and communication technology.

To contribute towards reducing inequalities, the textiles sector needs to address salary disparities among employees and strive to become an equal opportunity employer. Sustainable housing for workers and free transportation can be provided to promote sustainable cities and communities.

Responsible production and consumption is a critical Sustainable Development Goal, directly linked to the textiles industry.

The sector must focus on sustainable resource management, use of natural fibers and other natural resources, responsible chemical management, and waste reduction through prevention, reduction, recycling, and reuse. The textiles sector must
build knowledge and capacity to combat climate change and implement practices such as Zero Discharge of Hazardous Chemicals (ZDHC) to prevent harmful chemicals from polluting rivers and seas and reduce the use of materials that contribute to microplastic pollution to ensure sustainable life below water.

"The textiles sector must strengthen its means of implementation and revitalize the global partnership for sustainable development.

The circular economy in textiles is covered under the 12th Sustainable Development Goal, and target 12.5 aims to substantially reduce waste generation through prevention, reduction, recycling, and reuse by 2030.

There are various options for circularity, such as reusing textiles clothing after being used by someone else, repairing it to a functionality level similar to its original level, refurbishing it to a higher level of aesthetics and functionality, or recycling, upcycling, and downcycling material waste. This circularity of material waste needs to be accompanied by the recovery and reuse of water and energy.

However, there are key challenges in the collection and sorting of post-consumer waste. Better mechanisms for collecting post-consumption waste and automatic sorting of waste types will be developed in the coming years. Mechanical and chemical recycling are the two types of recycling methods, each with its challenges.

One challenge in mechanical recycling is preserving the fiber properties, especially the fiber length and strength. Meanwhile, preserving the degree of polymerization is the challenge in chemical recycling. Recycling cotton is particularly difficult since once it is recycled, it exhibits properties more like viscose rather than cotton."

It is possible to address sustainability challenges at different stages of the value chain, starting with the use of renewable, biodegradable, recycled, and organic materials at the raw materials stage.

Interventions can also be made at the production stage by reducing energy and water consumption, minimizing the use of chemicals, and managing waste and emissions.

At the packaging stage, the textile sector can use sustainable packaging materials that are renewable, biodegradable, and recyclable. The industry can also promote regional trade and use eco-friendly transportation to improve sustainability during distribution. At the usage stage, textiles that require less water and energy to wash and dry and do not need ironing can be promoted.

Finally, at the disposal stage, textiles that can be reused, recycled, or composted should be encouraged. By addressing sustainability at all stages of the value chain, the textile industry can make a significant contribution to achieving sustainable development goals.

Capacity Building for the Growth of African Fashion and Textiles Entrepreneurs

Dr. Lilac Osanjo
Department of Art and Design, University of Nairobi, Kenya

Dr. Lilac Adhiambo Osanjo is a lecturer at the University of Nairobi. She holds a PhD in Design and an MSc in Entrepreneurship. Osanjo is a member of the Executive Board of the Kenya Fashion Council. Her research interest is in quality training and professional growth of African fashion and textiles entrepreneurs. She provides training and capacity building for small and micro enterprises in product development for local and export markets.

The objective for African textiles is to address some of the global challenges through sustainable practices. In February of this year, Mr. Srinivasan, President of the World Design Organization, visited the University and encouraged us to align our design practices and education with the Sustainable Development Goals (SDGs). By 2030, our aim is to end poverty and hunger, increase access to education, address migration, combat climate change, and reduce inequality.

Handmade and high-end products have significant demand, and traditional products that have a story or cultural values are also potential revenue sources, in terms of style or raw materials. Additionally, most workers in traditional crafts and sectors such as weaving, tie and dye, screen printing, and embroidery are women.

To increase exports and address domestic challenges, we are looking to repackaging the African narrative, redefine African fashion and textile products, re-examine business processes, increase return on investment, and undertake value addition by branding, developing new products, new packaging, and innovation. These activities are expected to create more jobs in textiles and fashion and increase income. Two case studies, namely, Kitui County Textile Center (KICOTEC) and Kenya Export Promotion and Branding Agency (KEPROBA) Small and Medium Enterprise program, incorporate some innovations that can be replicated.

KICOTEC is a rural company providing direct jobs to 600
people and many more indirectly. The company has provided jobs in rural areas and provided training to local tailors in industrial stitching. Moreover, it provided alternate jobs to people whose primary source was charcoal burning. During the COVID-19 pandemic, the company produced masks and other personal protection equipment using locally sourced raw materials, serving the entire country.

KEPROBA is a multi-agency project under which SMEs are shortlisted, evaluated, and supported according to their needs, such as technology, packaging, marketing, standardization, and compliance. KEPROBA SME program aims to increase exports, especially of Small and Medium Enterprises (SMEs) from Kenya, considering free trade agreements to reduce the trade deficit. Under the program, value addition is encouraged to stop or reduce the export of raw materials. Each market and product are carefully analyzed from a sustainability and design perspective, and the products are designed to have an African cultural touch."

South Africa is emerging as a fashion hub and source of inspiration, providing valuable support to the African textiles and fashion industry. The efforts of African designers who have created designs for world-renowned companies are commendable. Textiles and fashion are crucial for Africa, and programs aimed at supporting the entire value chain, from design to product manufacturing and marketing, are playing a significant role in establishing sustainable textiles in Africa. These programs offer valuable services to SMEs, including training and capacity building, and represent small but important steps towards building a sustainable textile industry in Africa.

Key Sustainability Challenges In Textile Manufacturing

Dr. Olivier Zieschank
Director, International Textile Manufacturers Federation, Switzerland

Dr. Olivier Zieschank was born in Lausanne, Switzerland, and studied Management at the university of Lausanne where he graduated in 2005. Until 2010 he worked in a Swiss based company specialized in negotiating and optimizing cell tower lease agreements. He became associate director while his role quickly expanded into every aspect of running a small company on a tight budget. In 2010, he returned to university and studied economics in Neuchatel, Switzerland. He wrote his PHD in economics at the university of Freiberg, Germany, in which he develops the process theory of organization. Mr. Zieschank was appointed Economist at the ITMF in August 2017. In October 2020 the ITMF Board promoted Dr. Zieschank to the position of Director as of January 2021.

There are several key sustainability challenges in textile manufacturing that need to be addressed. One of the biggest challenges is creating cooperation among the textile value chain to exploit opportunities for recycling. While it is possible for individual companies to manufacture products at the factory level to achieve sustainability using current technologies, implementing sustainability on a larger scale is often challenging. Collaboration among people, companies, and governments is necessary to achieve this goal.

Sustainability has enormous potential for value creation, but it is difficult to implement in practice. During the ITMF’s annual conference held in Nairobi in 2018, an expert panel discussed the possibility of recycled cotton cannibalizing the market for virgin cotton. Four years later, while many types of recycled fibers have emerged in the market, the question remains: In a perfect world with advanced recycling technologies and fibers that do not deteriorate over time, the annual demand for virgin fibers would depend on the demand for newly produced fibers and their increased consumption over time. However, in reality, fibers do deteriorate, and the characteristics of recycled fibers are not equal to those of virgin fibers. Additionally, textile manufacturers may mix virgin fibers with recycled fibers in production, which would maintain demand for virgin fibers. The emergence of recycled fibers creates new forces that have been modifying the markets.

It is important to understand current recycling trends to
calculate the future demand for virgin fibers for cotton, polyester, and cellulosic fibers. According to data from Wood McKenzie, consumption of all fibers is expected to grow until 2030, but their share in total consumption could remain the same. For instance, polyester is expected to make up 60% of total consumption, cotton around 20%, and cellulosic fibers approximately 5%.

![Total Mill Consumption](image)

**Figure source:** From a presentation by Alexei Sinitsa, Ph.D., fibres consultant, Wood Mackenzie, at the ITMF Annual Conference 2022, Wood Mackenzie Chemicals Fibres Strategic Planning Outlook H1 20

Textile production is facing sustainability challenges, although degradable natural fibers like cotton are relatively sustainable, it still requires synthetic fertilizers, pesticides, and water for farming. Consumers also see cotton as a responsible choice. Hence, there is a need to improve sustainability throughout the entire value chain, starting from fiber production to end-of-life disposal. The principle of responsible production and consumption must be adopted. The strategies of ITMF’s member companies focus on circular economy and using recycled fibers to reduce waste generation. In the current linear economy, we take materials from the earth, convert them into production, and eventually throw them away. A circular economy, on the other hand, aims to stop generating waste at each step of the value chain, preferably at the first stage. Sustainable guidelines such as ‘reduce, reuse, and recycle’ are being incorporated into textile manufacturing. To increase sustainability in cotton and cotton goods production, strategies such as increasing the share of renewable energy, overall energy efficiency, and adopting innovative technologies to reduce waste from production can be implemented.

The main challenge for the textile industry is not in implementing individual solutions to improve sustainability at the company level, as these solutions can be applied independently with access to capital and technology. The real challenge lies in implementing sustainable solutions that require coordination along the value chain, such as textile and garment recycling. This requires material recycled at one point in the value chain to be shipped back to a given manufacturer to be reintroduced into the value chain. This manufacturing loop is associated with three key challenges: collection, traceability, and breakdown. Collecting textiles requires efficient ways to gather pre-consumer and post-consumer waste prior to shipping it back to the manufacturer or recycling plant to be processed into a new raw material. The creation of new logistic routes in the upstream value chain is one of the major difficulties associated with collection. To address this challenge, the European Commission has presented a new strategy as part of the European Green Deal and the Circular Economy Action Plan that prerequisites the separate collection of textile waste at the community level. The European Textile and Apparel Confederation is also currently working on recycling hubs, also known as rehab, to help European companies cope with the new guidelines.

The next challenge is traceability, which refers to the ability to track the composition of textile products at any step of the value chain. It is like the conventional concept of traceability but has a specific meaning in the context of textile recycling. Not only must the origin and mix of fibers be communicated down the value chain, but also the recycling requirements must be communicated up the value chain to facilitate the recycling loop. This is commonly referred to as design for circular economy, where the downstream industry considers the upstream recycling needs in product design. The breakdown challenge refers to the complexity of fragmented fabrics and yarns into smaller components by chemical or mechanical recycling. The precondition for sustainable recycling is a material that is as pure and consistent as possible.

![Circular Economy](image)

**Figure source:** European Parliament, from a presentation by Eddie Ingle, Unifi, at the ITMF Annual Conference 2022

Natural mixtures can pose challenges or make recycling uneconomical or technologically unfeasible. The packaging industry has already understood this fact and adopted the mantra “design for recycling,” which would equally benefit mechanical and chemical recycling methods as feedstock needs to meet certain specifications. The technology used for sorting and cleaning the input feedstock plays a major role in the success of textile recycling operations. The characteristics of fibers
are also modified by the mechanical recycling process, and their resulting fibers are often more difficult to process due to fiber types and quality. The industry is currently adapting to the challenges linked to the emergence of new fibers, and M/S Rieter is working on a solution to spin fibers with higher short fiber content. M/S Santis Textiles has developed mechanical recycling and advanced spinning technology to produce 100% pre-consumer recycled fibers. The Hong Kong Research Institute of Textile and Apparel Green Machine is capable of recycling blended products. A truly sustainable textile industry requires manufacturers to collaborate in addition to adopting individual strategies to reduce and reuse. However, working in a closed supplier-producer pair is not possible in this scenario.

The key to creating a sustainable textile industry is to bring together all stakeholders involved in the transformation of raw materials into consumer goods. This requires the creation of both physical and informational networks to facilitate the transportation of goods and recycled materials up and down the value chain, as well as the flow of information regarding fiber mix, origin, and recycling requirements. Vertical integration of information throughout the transformation process can improve collaboration and reduce costs.

However, the real challenge is understanding the consequences of using a single product at each step of the process. Only 1% of garments were recycled into garments by 2015, and this may still be the case. Recycling cotton textiles presents an opportunity for manufacturers to add value to products that have already reached the end of their life cycle, reducing the need for virgin cotton fibers, conserving water, and other resources, and reducing the impact of cotton production and consumption on the environment. By working towards recycling cotton technologies, we can create a sustainable textile industry that keeps useful fiber out of landfills or incinerators, extending its useful life.

The Textile Value Chain Africa’s Opportunity

Ms. Belinda Edmonds
Managing Director, African Cotton Foundation

Belinda Edmonds has worked in almost all sectors of the African Textile and Apparel Industries over the past 30 years. Born and raised on a cotton farm, she entered the textile manufacturing sector in 1988, working in spinning, weaving, knitting and dyeing/printing facilities before transitioning to the apparel production sector in 1997. Since 2000, Belinda has used her experience to support and promote cotton, textile, and apparel exports from Africa. At its inception in 2018, Belinda joined the African Cotton Foundation as its Managing Director. Passionate about Africa, Belinda believes that promoting and assisting trade is a critical tool to uplift and protect its people, cultures, and its environment.

The African Cotton Foundation (ACF) was founded in 2018 with the aim of creating shared value along the entire textiles value chain and improving the lives of African cotton farmers. The vision of ACF is to establish a sustainable, modern, and thriving African cotton sector by increasing the productivity and incomes for at least 2 million African cotton farmers by 2025. To achieve this, their ecosystem partners are focusing on the strongest supply chains, income diversification policies, market linkages, financial services, and technical support. The African apparel and textile industry is supportive of these initiatives.

Figure 1. Textile Exports from Africa (US$ Millions)
Source: WTO & ITC
According to the World Trade Organization (WTO), in 2019, the global textiles exports market was valued at $305 billion, and the global apparel exports market was valued at $493 billion.

Since the first industrial revolution, the cotton, textiles, and apparel sectors have been driving growth through industrialization and increased trade. Furthermore, the textiles value chain generates employment, especially for women with minimal training. Despite having preferential access to developed nations’ markets, most African countries, especially Sub-Saharan countries, are not contributing to the international textiles trade.

Currently, most of the fiber is exported, and few African countries have successfully developed an export-focused apparel sector. Some African countries have integrated the textile value chain, creating jobs, but most of the added value remained offshore.

In summary, the African cotton, textiles, and apparel sectors are, for the most part, three separate industries that do not fully realize the potential of a robust value chain.

It is imperative to create a sustainable and thriving African cotton sector to improve the lives of African cotton farmers, empower cotton-growing communities, respect human rights, conserve the environment, and establish a modern industry that contributes to the international textiles trade.

The textiles and apparel sectors function differently from each other, with fixed assets being required in the former and movable assets in the latter.

While a high investment is necessary in textiles, the return on investment is low, whereas in apparel, the return on investment is high with a lower investment required. Additionally, textiles generate fewer jobs per dollar invested compared to apparel, which creates more jobs.

To develop the textiles and apparel value chain in Africa, government policies need to be put in place with the participation of the private sector in investment.

The private sector requires guaranteed protection of their investments, repatriation of forex, investment incentives, ease of doing business, and reliable access to energy at lower prices.

Other necessities include the development of industrial zones, access to land, duty-free imports of textile machinery, and alignment of labor laws with the International Labor Organization (ILO).

Foreign investors require protection from dumped imports and long-term duty-free trade concessions.

Establishing a sustainable textiles value chain in Africa would help achieve Sustainable Development Goals (SDGs) commitments, create jobs, promote industrialization, reduce poverty, and mitigate environmental impacts in the future.”