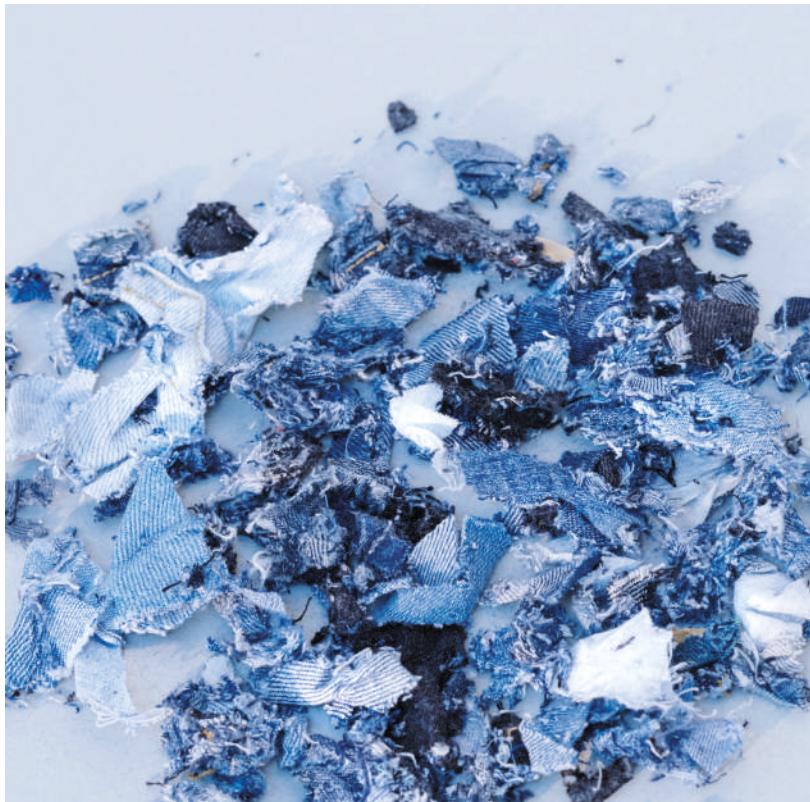


Re_fashion

Annual report 2020



Re_thinking production

Re_imagining consumption

Re_valuing waste

Textile sector's eco-organization



Re_inventing equilibrium

Didier Souflet
President of Refashion

2020 has been a pivotal year for all of us in the Textile Industry. It has been an extraordinarily tough period, with most stakeholders being abruptly flung into an unprecedented crisis. 2020 has also seen a number of significant societal changes accelerating, and both our individual and collective capacities for adaptation have been severely put to the test. More than ever, this has been a year of strengthened cooperation between us all.

2020 was also the year that the eco-organization's public authority accreditation was renewed for a further three years (2020-2022), with an unchanged set of specifications intact and against a backdrop of a textile industry that is in transition. The goal now is to draw on all the lessons learnt from the past eleven years, which together with the major changes from anti-waste and circular economy legislation (the AGEC Law, *Loi relative à la lutte contre le gaspillage et à l'économie circulaire*), published in

February 2020, will constitute the backbone of a new set of specifications.

2020 has also been the year when our eco-organization was recast through the launch of Refashion, which stems from the joint Textile Pact of June 2019 that forms the foundation upon which we can build in the years ahead. Refashion is both our eco-organization's new name and the title for a collective project across the Textile Industry.

Re_fashion means Re_inventing a model of environmental, economic and social balance. It means optimizing available resources and developing new resources throughout the life cycle of different products and services.

To this end, the eco-organization's team was strengthened in 2020, and as you read this report, I invite you to learn more about the results of the work carried out for everyone's benefit, especially the help being provided to promote eco-design and to develop reuse, repair and recycling.

Of course, given the extraordinary nature of 2020, data for the year will evidence sharp falls across most of our flow indicators, but upon closer examination can be found signs of a shift that shows we are en route towards new forms of value creation.

Let's stay firmly united to create a 100% circular Textile Industry. •



2020 MARKS A MAJOR CHANGE FOR THE ECO-ORGANIZATION AS IT MOVES FROM A MANAGING 'WASTE' DYNAMIC TOWARDS ONE THAT CREATES 'NEW RESOURCES'. IN THIS APPROACH, THE CHALLENGE IS NOT ONLY TO FOCUS ON THE END OF THE VALUE CHAIN (USED TEXTILES TREATMENT), BUT ALSO TO MAKE BETTER USE OF RESOURCES DURING THE PRODUCTION, CONSUMPTION AND RECOVERY STAGES OF THE PRODUCT LIFE CYCLE. THESE THREE STAGES TYPIFYING THE **PRINCIPLE OF THE CIRCULAR ECONOMY ARE THUS AT THE CORE OF REFASHION'S ACTIVITY AND THE MAIN THEME FOR OUR ANNUAL REPORT.**



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Together, for a responsible, exemplary Textile Industry

Redefining its pathway and its economic strategy, and committing to a 100% circular ecosystem through collective action are the core missions that our Textile Industry, which is emboldened and strengthened by experience and by the current crisis, has set itself for the next decade. Refashion will be at its side every step of way throughout this transformation.

This recent extended COVID-19 health crisis has completely disrupted the market in general and the Textile Industry in particular. As a result, we have reexamined the vision we want to share and carry through for the next decade.

2020, the year when everything changed

During the year, several factors impacted our sector:

- The number of marketed textiles and footwear items fell by more than 500 million units, i.e. an average decline of 18%.
- Some companies have ceased operations, and many brands are in a critical financial situation.
- Collection and sorting operators have gone through, and continue to undergo difficulties, with some even having withdrawn from collection services.
- Against this backdrop, collection and sorting volumes fell by 20%.

Changing behaviors

Alongside these challenges, new trends are emerging and others are becoming more established. Here are a few examples:

- Consumers are demanding more sustainable products.
- More and more brands are engaging in and are committed to a circular economy approach, and are implementing plans to measure and reduce the environmental impact of their products and business models.
- The second-hand market is becoming increasingly organized and professional in France and in Europe, with both a growing digital universe (Patatam, Vestiaire Collective, Vinted, etc.) and a proliferation of brands participating in used textiles collection and resale experiments across their own-store networks.
- In addition, French and European regulations have been evolving. European Union directives relative to its 'Circular Economy' package include

OBJECTIVE 2030

What is the pathway towards a 100% circular economy by 2030? What impact will this have on brands and on those engaged in collection, sorting, and recycling? What will the new responsibilities be for local authorities?

What role will Refashion play as a facilitator for this ecosystem and architect for its transformation?

The challenges for the next ten years have been clearly identified and are in line with the **3 phases of the product life cycle**:

1. PRODUCTION

Products coming to market will have to be more durable, more recyclable, and incorporate even more recycled materials.

All brands will have already initiated environmental assessments of their business activities.

2. ECO-RESPONSIBLE CONSUMPTION

Consumers will have to be clearly informed of the environmental impacts of their purchases by way of an A to E rating scale that will apply to all products. Responsible consumption (consume less but better, rent if possible, subscribe...) and longer product usage times (reuse, repair, recycle) will be actively encouraged.

3. WASTE RECOVERY

100% of the Textile Industry's waste must be transformed into new resources in France and Europe, thanks to an efficient recycling industry that creates value.

Significant resources will have to be deployed to attain these ambitious objectives. The real cost of the waste transformation into new resources will increase considerably and will have to constitute an investment that is fully taken on by businesses within the Extended Producer Responsibility (EPR) framework. Refashion will be there to accompany companies as they implement what is a process of ongoing progress that is essential for the future of our planet.

a requirement for the separate collection of used textiles, linen and shoes as of 01 January 2025 in all EU Member States. In France, anti-waste and circular economy legislation (AGEC law) reinforces obligations for brands and eco-organizations. In addition, the future Climate and Resilience Act, which is currently en route through the French Parliament, should accelerate the ecological transition in all areas of our daily lives, notably with the creation of a 'CO₂-score', so that French consumers will be able to see the climate impact of the goods and services they purchase. •

REFASHION IN 4 MILESTONES

2008: Creation of the Eco TLC company

The Textile Industry eco-organization was approved by the Ministry of the Ecological Transition and the Ministry of the Economy.

2009_2013: First accreditation period

First set of encouraging results, thanks to the implementation of a system that encompassed all relevant stakeholders: 27% of used textiles were collected, and the sorted tonnage volume doubled.

2014_2019: Second accreditation period

Mission: achieve optimal efficiency sooner. Assessment of the eco-organization's first 10 years:

€150 million directed at primarily financing sorting in order to allow product reuse; recycling solutions in Europe are not sufficiently industrialized or profitable.

2020_2022: Third accreditation period

Transition period: preparations for the Textile Industry to evolve as a priority towards new product eco-design and the development of industrial solutions for recycling used products in Europe.

Textile Industry: 2020 key figures

RECOVERY

Collection

204,291
TONNES COLLECTED

44,633
VOLUNTARY DROP-OFF POINTS (VDPS)

Industrial sorting

156,202
TONNES SORTED

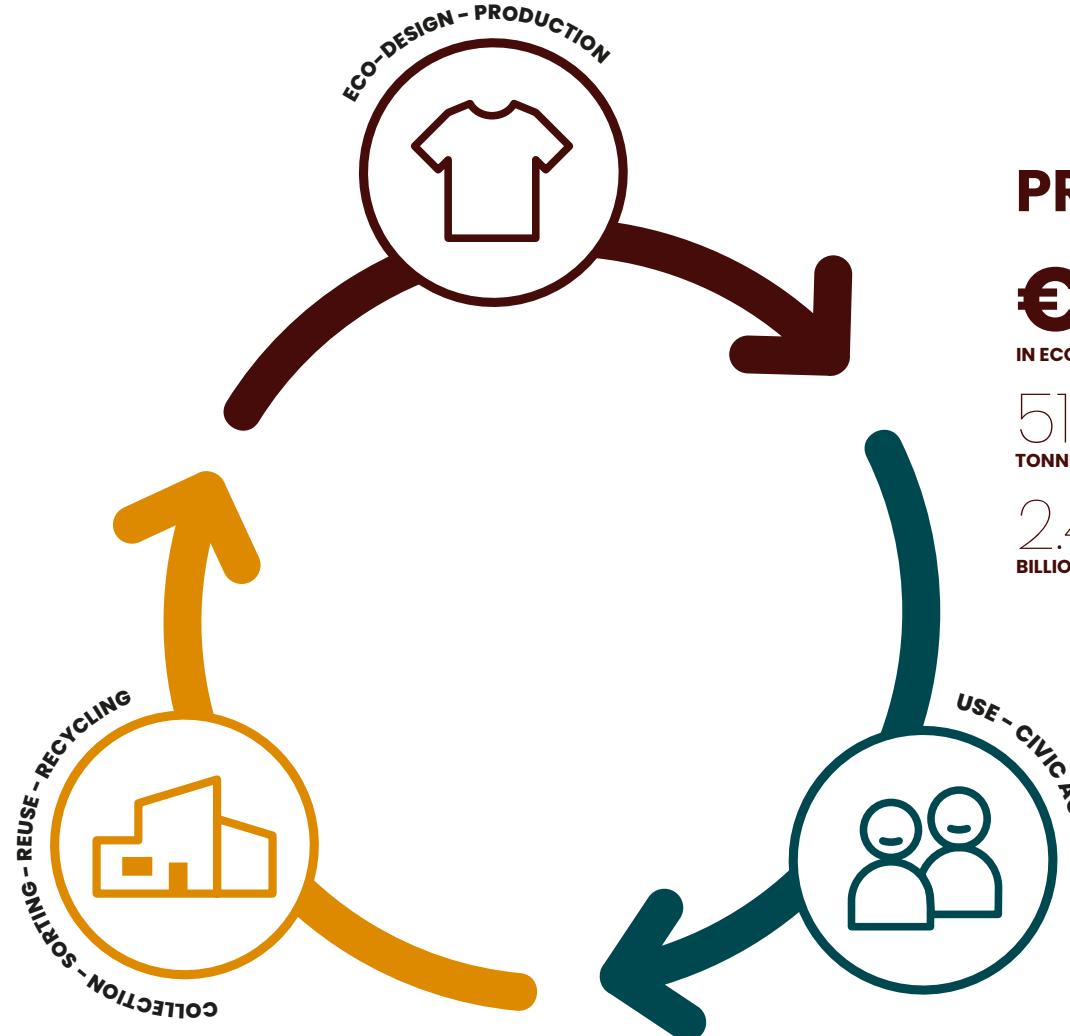
€17 MILLION
PROVIDED TO

64
SORTING FACILITIES UNDER CONTRACT

Research & Development

NO. OF PROJECTS RECEIVING REFAIR SUPPORT SINCE THE OUTSET OF THE CHALLENGE INNOVATION INITIATIVE

55 | FINANCIAL SUPPORT PROVIDED IN € MILLIONS 5



PRODUCTION

€34.5 MILLION
IN ECO-FEES

517,200
TONNES OF MARKETED ITEMS

2.4
BILLION MARKETED ITEMS

4,096
MEMBER BRANDS

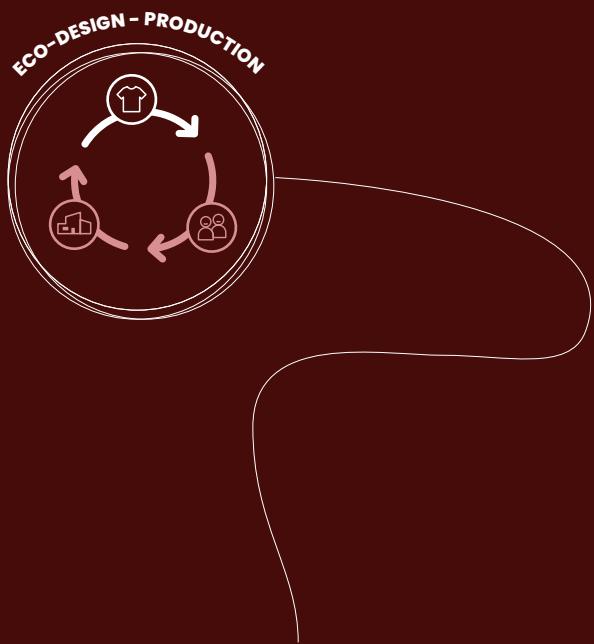
17.5
MILLIONS OF
ECO-MODULATED PRODUCTS

CONSUMPTION

€2.3 MILLION
IN FINANCIAL SUPPORT PAID TO LOCAL AUTHORITIES IN 2020 FOR PUBLIC AWARENESS CAMPAIGNS CARRIED OUT IN 2019

535
REGISTERED LOCAL AUTHORITIES
858
PUBLIC AWARENESS RELATED CAMPAIGNS RECEIVED SUPPORT IN 2020 FOR THEIR 2019 OUTLAYS

21
MILLION IMPRESSIONS ACROSS SOCIAL MEDIA DURING THE NATIONAL #RRR CAMPAIGN



Re_thinking production

Despite the unprecedented health crisis, 2020 marks the beginning of a new era of greater company and brand mobilization both by supporting downstream activities and by deploying eco-responsible commitments upstream.

Eco-design is thus becoming the key stage in the production process. All items put on the market are future resources and must therefore be considered and developed as such.

2.4 billion

products were put on the market in France in 2020.



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ECO-DESIGN

A toolkit for successfully rising to the challenge

In September 2020, Refashion launched Eco design, a landmark platform supporting brands' to design textiles and shoes in an eco-responsible manner. The eco-organization goes even further helping its members by organizing digital 'awareness and support' workshops. Read on for further details.

The circular economy is gaining momentum, and with eco-design is becoming the preferred lever for change in the textile and footwear industries' model. Producing more sustainably, reducing waste and working on recyclability are the issues we are tackling today. Refashion is thus drawing on the expertise of a full committee of experts. Comprising various brands, research departments and institutional organizations such as the French environmental transition agency ADEME, Refashion has designed the **digital Eco design platform** to be a synthetic tool that supports brands in their efforts to raise eco-design awareness.

The Eco design platform is aimed at fashion industry professionals such as designers, pattern makers, product managers and collection managers, all of whom now hold the power to design their products in an eco-responsible way. Open source, free, simple and synthetic, the platform is looking to become both the reference for responsible design and a bespoke user guide as well.

Eco design launch a success

To launch the platform, Refashion imagined an

original digital eco-design event that was held on 22 September 2020. The goal was to inform and engage stakeholders along the eco-design path irrespective of their size and 'eco' experience.

By way of a webinar, participants could access different rooms and formats including:

- ▶ A plenary space with presentations by ADEME, Pôle éco-conception (national eco-design center), Decathlon (sports retailer), the Orée association, the Union of Textile Industries, bluequest (CSR specialists), and the Fédération du Prêt-à-Porter Féminin (French Federation of women's ready-to-wear apparel).

- ▶ Feedback stands for five inspiring brands that are key French actors in marketing items.

- ▶ A networking space for the sector's actors to interact and build contacts.

1,300 Textile Industry actors registered, 500 chat comments were posted, and 220 registered on the Eco design platform on its first day. This was a really successful launch and with the format scoring a 9/10, has strengthened our resolve to repeat this type of event.

Eco-design events not to be missed

Buoyed with the webinar success, Refashion set up a series of eco-design meetings, operating as workshops set up to build awareness and

to support brands. Two workshops opened in November and December 2020, and focused on sustainable materials sourcing as well as the recycling potential of eco-design.

In choosing a workshop formula, the eco-organization is able to offer fun and easily accessible opportunities to learn quickly and easily. Ultimately, the goal is to gather a community of eco-designers together so that with these workshops:

- ▶ Newcomers gain greater awareness of the issues involved with the circular economy and sustainable fashion.
- ▶ The features of the Eco design platform are effectively communicated so brands are encouraged to consult this eco-design reference tool during their product creation phases.
- ▶ Brands can access support for specific issues, such as eco-designing a product and improving its recyclability, eco-designing shoes, lingerie or household linen, ensuring a sustainable supply of materials...

So what's next?

Refashion is already thinking ahead about new features for the Eco design platform, including **creating user pathways**: personalized entries to the tool depending on the user's role, eco-design level, specific interests and the range of products being worked on. •

For more information:

- Visit the Eco design platform: refashion.fr/eco-design/en
- Check out our YouTube channel and view the Eco design morning session video and pictures

4 REASONS TO CHOOSE ECO DESIGN

1. 'Eco Watch'

Stay on the lookout for new eco-design developments (resources, guides, tools...)

2. 'Cheat Sheets'

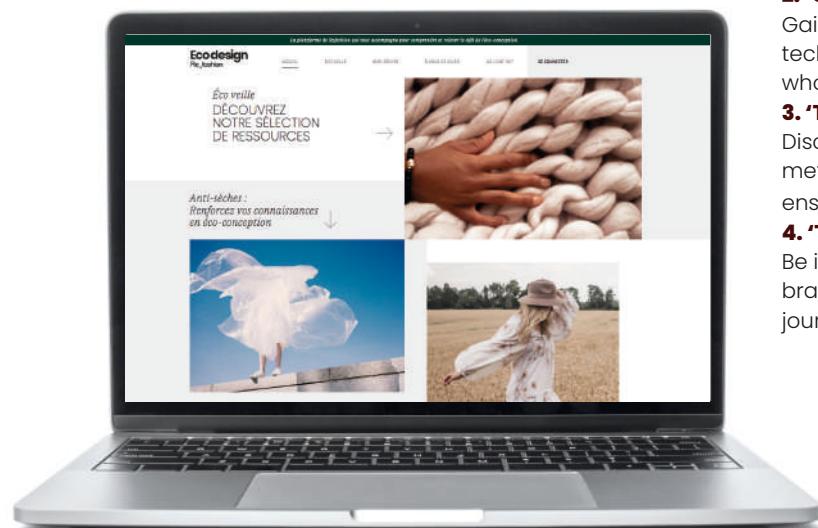
Gain access to a common technical base across the whole Textile Industry

3. 'Try it!'

Discover different operational methodologies in order to ensure your launch succeeds

4. 'They've done it!'

Be inspired by committed brands that report on their journeys and progress



ENVIRONMENTAL ASSESSMENT

Refashion at the heart of French and European effort

Evaluating the environmental impact is essential when eco-designing products. French and European initiatives are providing support for clothing and footwear brands on their journeys. Read on for an overview.

French environmental labelling: Grade A to E

Promulgated in February 2020, the anti-waste and circular economy AGEC Law (see also p. 19) intends for an eighteen-month trial encouraging volunteer companies to start using environmental labelling.

With a score ranging from A to E, the label assesses the environmental impact of a product's entire life cycle. In this way, consumers can be encouraged to buy responsibly and producers can be encouraged to improve their products' performance levels.

Refashion actively participates in ADEME sponsored working groups that are set up as part of this trial, and in particular in its role as member of the steering committee for the group 'Benchmark developments and sister group for the European PEFCR Apparel and Footwear project (Product Environmental Footprint Category Rules). Comprising of 134 organizations, this group's mission is to coordinate the French contribution to the European Commission's project in recognizing the expertise of and feedback from France's environmental labeling efforts.

A strategic European project for the Textile Industry

As a European Commission initiative, the PEFCR

Apparel and Footwear project has set a target to define the rules for calculating the environmental impact of clothing and footwear. These rules will offer a common Europe-wide calculation reference that inter alia will address the complex issues of product sustainability and circularity. Refashion is a fully committed voting member of the PEFCR technical secretariat for the project's three-year duration (2020-2022). Comprising some twenty European Textile Industry participants, including the Federation of Haute Couture and Fashion, Decathlon, Lacoste, H&M, Inditex, Nike, as well as the ADEME, this group defines the rules for calculating the environmental impact for the following 13 product categories:

- T-shirts • Shirts and blouses • Sweaters and lightweight jerseys • Jackets and coats • Trousers and shorts • Dresses skirts and overalls • Leggings, stockings, tights and socks • Underwear • Swimwear • Clothing accessoires • Sandals • Closed-toed shoes • Boots and ankle boots

PEFCR Apparel and Footwear will have several uses, including in eco-design by identifying the impact of products on the environment, in enriching and framing brands' communications and, of course, in environmental labelling. •

ENVIRONMENTAL LABELING

A French pilot



France is currently piloting environmental labelling as envisaged by the AGEC law.

Refashion is a committed stakeholder in the ADEME working groups.

European standardization efforts



Refashion is proactively working towards building a PEFCR European standard. A phase of case studies, called 'Supporting Studies' is planned for 2021, and they will enable French brands make their own product environmental evaluations.

BRANDS, COMPANIES, PRODUCERS

En route to sustainable production

Being a member of the Refashion eco-organization means being engaged in the circular economy, because it represents a basic fundamental level in contributing to the treatment of Textile Industry waste. However, a great deal more needs to be done and this is but a small step in the race to reduce the sector's environmental impact.



Consumption down in 2020

4,096
companies
are currently levied
mandatory eco-fees

In 2020, every French citizen bought on average 29 pieces of clothing and 3 pairs of shoes, while every household bought 9 pieces of household linen. That makes total of 7.7 kilos of textiles per person. In the same year, some 2.4 billion pieces, or **517,200 tonnes of clothing, household linen, and shoes** were put on the market, or **20% less than in 2019**, which brought the 2020 volumes back to the level in 2012.

Textile Industry data in brief

Using annual data on declared quantities, Refashion can produce a snapshot of the make up of and changes in the French textile landscape. In an industry where data rules, the data that is compiled and made available free of charge offers marketers a source of invaluable information.

Sneakers, just one example of the data available

Did you know that? In 2020, 1 out of every 2 pairs of 'adult' shoes sold in France was a pair of sneakers (sport and leisure). However, 'woman adult' and 'man adult' markets are not the same: for every 3 pairs of women shoes sold, only 1 is a pair of sneakers, while for men the equivalent is 2 pairs.

Refashion glossary

► EPR: Extended Producer Responsibility

► **TEXTILE EPR:** this is the legal obligation for brands to contribute to the financing of their products' end-of-life management

► **MARKETER:** term describing brands, companies and manufacturers that sell textiles, footwear or clothing products in France

► **MEMBER:** a marketer that declares the quantities marketed then pays the eco-organization the relevant eco-fee



Understanding eco-fees

Created by Refashion in 2020, this **film focuses on its members** and shows in under than 3 minutes how important their contribution actually is and how the eco-organization actually operates.

Watch the film on our YouTube channel.

THE SCALE

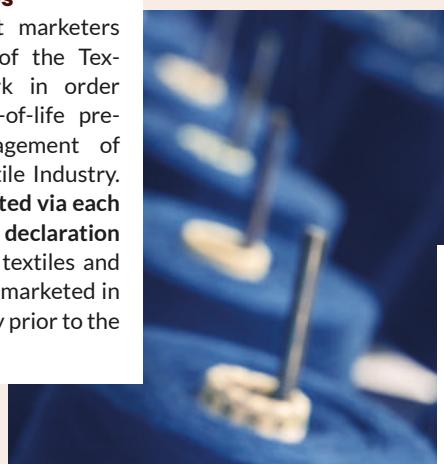
Eco-fees and eco-modulations



Each year, marketers have to pay their textile and shoe-related eco-fees. In seeking to develop the environmental value of the different products, Refashion has adapted the fees scale by way of eco-modulation.

What are eco-fees

They are fees that marketers must pay as part of the Textile EPR framework in order to ensure the end-of-life prevention and management of products in the Textile Industry. Eco-fees are calculated via each marketer's annual declaration of the quantities of textiles and footwear that it has marketed in the year immediately prior to the declaration year.



How is an eco-fee calculated?

Eco-fees are calculated according to the quantities of textiles and footwear reported per category (shoes, trousers, T-shirts, etc.). Each category corresponds to a scale that sets the fee amount per item. The total fee for the marketer is simply the relevant fee amount times the number of items.

The scale is defined by a Scale Committee that meets several times a year and is organized by Refashion. The scale is approved by the Board of Directors.

refashion.fr/pro/en/calculating-fees

What is the purpose of eco-modulation?

In order to transform waste into resources, we need to encourage marketers to sell more sustainable, eco-designed and easily recyclable products. Refashion has set up a way to apply eco-modulation to the eco-fees scale that operates around three major axes: sustainability, integration of post-production offcut recycled materials, integration of post-consumer recycled materials. Being both simple and fair, the scale must accurately reflect industry realities. With this in mind, Refashion plans to change the scale's rules that were drawn up more than ten years ago, by initiating a period of joint reflection during 2021.

refashion.fr/pro/en

Two major advances in 2020

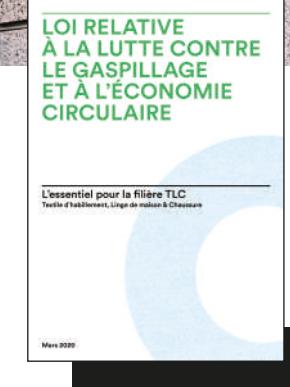
First, curtains and net curtains are now part of the Textile EPR and have been added to the existing categories.

Second is that the nomenclature has expanded to include several new categories and sub-categories. So, from 57 categories in 2019, there are now 110 categories for 2020. This means more customer typologies can now be accommodated and better reflect the reality of the industry. It also means that we can better evaluate the changes and developments that will occur in the years ahead.



The AGEC law: Key Points

In March 2020, Refashion along with twelve Textile Industry federations co-signed the "L'Essentiel" document that clarifies and explains the content of the anti-waste and circular economy law so that brands can anticipate the various changes in their sector.



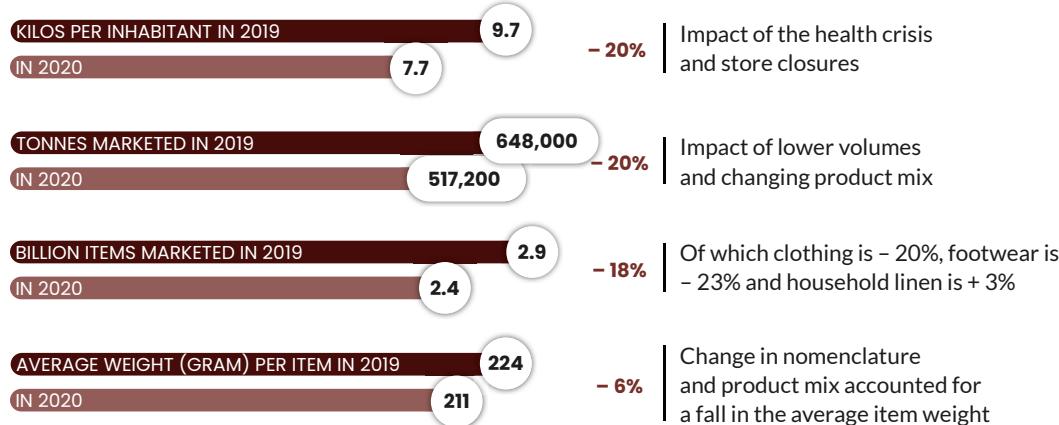
Promulgated on 10 February 2020, law No. 2020-105 (AGEC) gave ecological transition a major boost. Just a month later, Refashion co-signed a summary document to help marketers gain greater understanding of both the law and its consequences for their products' life cycles. The AGEC law marks an important step for the entire textile and footwear industry as it resolutely journeys on the road to sustainable development, and acts as a complement to initiatives already undertaken. Companies are key in this transformation by optimizing the life cycle of the products they place on the market, by extending product

lifespans, including minimum levels of recycled materials, prioritizing product reuse, collecting products more intelligently, by gifting rather than destroying, and by avoiding wasting or throwing products away.

Consumers must consciously adopt eco-friendly consumption habits. For this to happen, the Textile Industry must support consumers by providing information on the environmental impact of their products. These changes are essential for curbing environmental impacts, limiting waste, and preserving earth's natural resources. With everyone on board, such changes will enable the fashion industry to become more circular and environmentally responsible. •

Marketed Items - Key Figures

Marketed textiles and footwear items



Breakdown of the number of marketed items⁽¹⁾ in %

The higher proportion of household linen is due to two factors:

- 2020's new curtains and net curtains category⁽²⁾ (15 million items).
- Household linen sales were less affected by the health crisis (- 6% vs. - 17% for clothing, and - 20% for footwear).



(1) Data reported by marketers to Refashion.

(2) As of 01 January 2020, curtains, net curtains, indoor blinds and the like are subject to Textile industry EPR requirements.

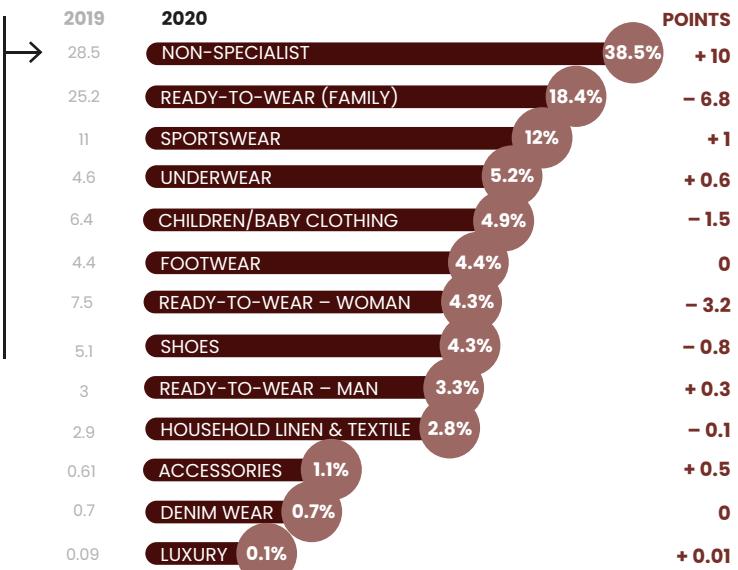
Breakdown of the reported number of marketed items in 2020 per overseas departments and territories (DOM + TOM)

	FOOTWEAR	HOUSEHOLD LINEN	CLOTHING	TOTAL	POPULATION	NUMBER OF ITEMS/PERSON
GAUDELOUPE	477,476	295,938	2,252,452	3,025,866	387,629	7.8
FRENCH GUIANA	145,982	70,843	940,433	1,157,258	86,504	13.4
MARTINIQUE	332,911	283,514	2,892,426	3,508,851	368,783	9.5
MAYOTTE	35,183	1,118	387,714	424,015	256,518	1.7
REUNION ISLAND	982,179	510,164	10,233,595	11,725,938	855,961	13.7
SAINT PIERRE AND MIQUELON	1,553	1,654	5,248	8,455	5,985	1.4
SAINT-MARTIN	8,378	7,275	176,432	192,085	34,065	5.6
TOTAL	1,983,662	1,170,506	16,888,300	20,042,468	1,995,445	10

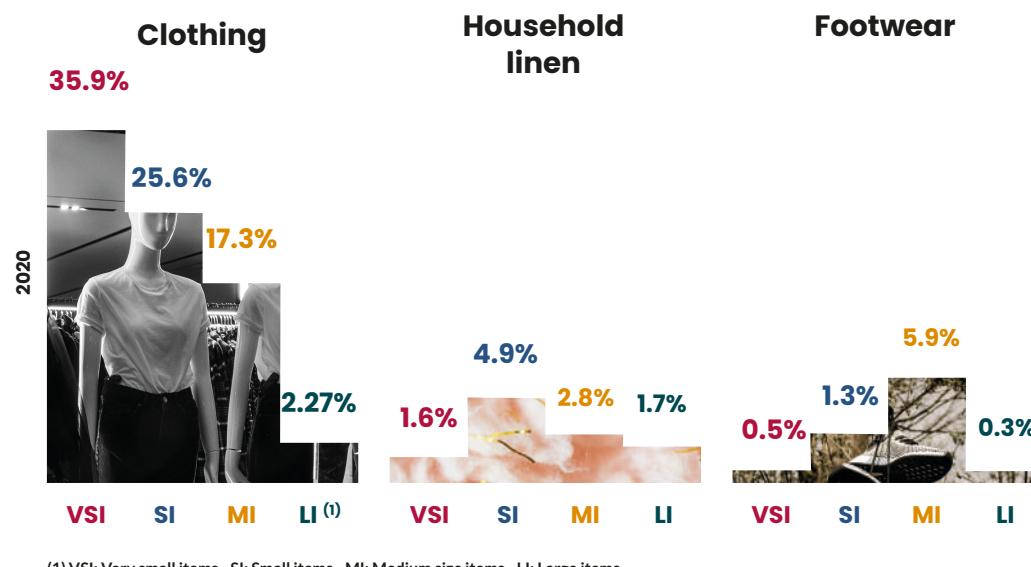
For the past two years, the eco-organization has benefited from more fine grained data on the volumes of marketed items in France's overseas departments and territories (DOM-TOM). **2020 saw the number of marketed items reported rise by 8% to 20 million.** This represents just shy of 1% of the total volume of items marketed and corresponds to 3% of the French population. Household linen numbers are significantly lower in the DOM-TOM compared with mainland France, (the proportion of household linen items reported stands at 6% in the overseas departments and territories, while for mainland France, the equivalent is 11%), while the numbers for clothing and especially footwear are comparatively higher.

Breakdown of items marketed per member type

There was a sharp rise in the proportion of items marketed attributed to non-specialist members while the proportion for ready-to-wear specialists (woman and children) fell accordingly. The proportion attributed to sportswear specialists also grew (+1pt).



Number of items marketed broken down by scale category



Members reports audit

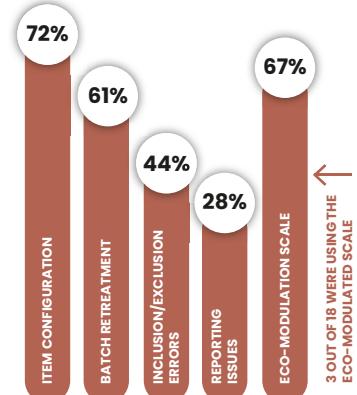
Refashion prioritizes both upstream and downstream traceability, as well as data integrity. Refashion's 2020 audit cycle showed that 61% of cases audited generate requirement compliance measures.

Audit cycle compared: 2020 vs. 2019

	2019	2020
NUMBER OF MEMBERS AUDITED	67	18
EXPRESSED AS THE NUMBER OF ITEMS MARKETED (IN MILLIONS)	678	628 (1)
EXPRESSED AS THE PERCENTAGE OF ALL ITEMS MARKETED	24%	24%
EXPRESSED AS THE AMOUNT IN ECO-FEES (€ MILLION)	5.13	6.026
EXPRESSED AS THE PERCENTAGE OF TOTAL ECO-FEES	24%	24%
NUMBER OF ON-SITE AUDITS	34	N/A (2)
NUMBER OF ITEM AUDITS	33	18

(1) Every year 15% (min.) of audits must be carried out on the number of reported items.
(2) Health crisis impeded on-site audits.

Anomalies recorded (% per type)

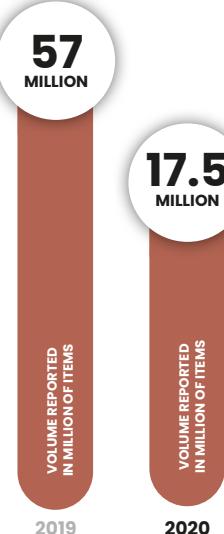


In 2020, the Scale Committee enabled four major changes

Work projects for both Refashion and the Scale Committee have enabled the four following major changes:

- Changes made in product nomenclature resulting in 119 categories (up from 54) that now include a curtains/net curtains category.
- EM1 (sustainable eco-modulation) extended to roughly ten product groupings.
- Bonus eligibility requirements recalibrated (criteria and standards levels).
- Tighter monitoring of reasons justifying product eligibility vis-à-vis the criteria for each year.

2020 eco-modulation results



Overall, 2020's reported eco-modulation volumes slipped back to 2018's levels, due to the combination of several contributory factors.

- The health crisis suppressed volumes and impeded the administrative process for providing the relevant justification documentation.
- 15 different brands that in 2019 had provided eco-modulation reports abstained in 2020.
- 6 key brands joined the group of bonus beneficiaries in 2020.
- The 10 or so brands that have reported their eco-modulation volumes for the past two years and that account for up to 10% of items marketed saw them fall by 43%.

Further details:

- Significant increase in the volumes of footwear and household linen products incorporating recycled materials.
- Most clothing products reporting focuses on sustainability.
- Categories with a significant proportion of eco-modulated products relative to total market volume include:
 - Denim trousers, with a rate >5%
 - Low-heeled footwear, with a rate >4%
 - Boots, with a rate >3%
 - T-shirts, with a rate >3%
 - Sweaters, with a rate >2%.

Re_imaging consumption

Refashion provides access to three different websites on a single portal (**Refashion pro**, **Refashion citoyen (citizen)**, and the **Eco design** platform), as it continues to pursue its goal of informing the public and raising awareness over changing behaviours.

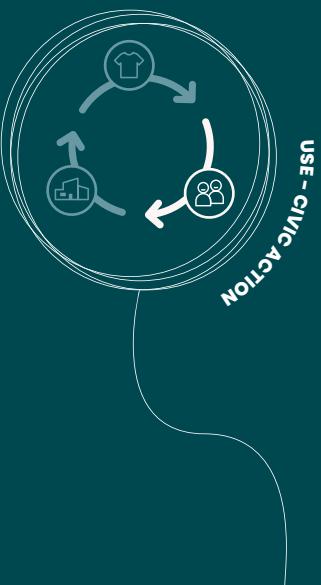
In this way, the eco-organization is promoting responsible consumption initiatives.

Re_fashion

Did you know? The English word 'fashion' can trace its origin back to the French word 'façon', meaning the know-how related to clothing manufacture.

Refashion is now bringing renewed expertise so that we meet the challenges facing the Textile Industry.

Also, our new branding hit the road running, winning **Silver in the Design category at the 2021 Grand Prix Stratégies de la communication d'engagement awards** that recognize engagement communication strategies.



For a 100% circular textile industry

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The #RRR campaign – Repair. Reuse. Recycle. P 27
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Refashion's digital development

In September 2020, Eco TLC became Refashion. To better promote the entire industry's transformation goal, the eco-organization set about re-designing its own websites and social networks both in terms of content and style. Here's an overview of our social reach.

- The most popular Facebook post of the year (non-sponsored)**

Post from 11 Aug 2020 about the first shopping mall in Sweden to only feature recycled products:

1,000 likes,
33,000 people reached
and 4,350 interactions

- Refashion citoyen**
118,275 page views in Nov-Dec 2020

- The Instagram post with most impact (Refashion content)**

Post from 10 Jan 2020:
7,500 impressions,
582 likes and
20 comments



INSTAGRAM⁽¹⁾
13,800 followers in 2020, + 2,800 vs. 2019



FACEBOOK⁽¹⁾
111,000 followers in 2020, - 2,000 vs. 2019 due to a halt in sponsors (Jan - Sept)



LINKEDIN⁽¹⁾
3,770 followers Account set up in 2020



A YOUNG TARGET DEMOGRAPHIC
51% of followers < 34 years old

(1) Figures at the end of December 2020



Expertly and smoothly run by the SGK brand experience agency, the #RRR campaign offers signatories/brands three customizable options so that each brand can carry a common message while keeping its individual identity.

The #RRR campaign Repair. Reuse. Recycle.

Launched by Refashion and running between 02 and 10 October 2020, this second consecutive annual campaign saw the #RRR movement continue to raise awareness and inform the public about new lives for used textiles and better ways to sort. An innovative social network campaign nationwide.

A committed Textile Industry

In 2020, with its predominantly digital campaign that brands can themselves adapt and that actors in the second-hand segment can also access (e.g. Vinted, recycling and upcycling centers...), Refashion has now mobilized a hundred or so actors (vs. 66 in 2019) that are posting key messages on their social networks (Instagram, Facebook, LinkedIn).

A campaign bringing actors all together

Kering, LVMH, Le Slip Français, Aigle, Tilli, Petit Bateau, leboncoin to name but a few... From a diverse set of universes, Textile Industry actors have, for the first time, rallied round a single charter of committed engagement. The Ré_unir (Re_unite) declaration celebrates this collective desire to promote the key stages of more responsible textiles and footwear use and consumption.

This campaign centers round a 'fact checking'

concept that highlights an attention grabbing shock-worthy number alongside a universal 'DON'T DISCARD' message that tries to encourage positive action. #RRR comes in both 'out of the box' and 'customizable' versions that can align with each brand's individual charter while keeping the same tone so that everyone is speaking with the same voice. The logo was also made available in physical format for brands seeking window displays. •

RESULTS THAT REFLECT REAL COMMITMENT

#RRR numbers for 2020 vs. 2019:

- 31% of the population reached by the campaign (vs. 27% in 2019)
- + 3.2 million people successfully targeted by brand mobilization
- 21 million impressions on social networks
- 60% less investment for a more effective media campaign

Local authority actions



FRESH NEW SYMBOL

In 2020, the Network Committee updated the Textile Industry's benchmark standard to indicate that every drop-off point (DP) carrying this mark is recognised by the eco-organization and that outcomes for all deposited items are being traced. From June 2021, the new logo can be displayed on local authorities' communication media as well as at voluntary drop-off points (VPDs), where signage has also been updated.

All good sorting habits start at local level.

Across the whole of France, local authorities have the task of putting effective information and communication tools in place in order to raise public awareness and encourage the public to sort through their items. Refashion's financial support for 283 local authorities amounted to a total of €2.3 million (858 communication actions undertaken in 2019).

Many awareness-raising local authority initiatives have flourished throughout France.

Here are some of the standouts:

1. Flea market collection

Metropolitan Orléans and the Saint-Brieuc Armor agglomeration community have pioneered the systematizing end-of-market item collection alongside their collection partner. Flea market organizers are encouraged to organise and implement collections after their events close.

2. New lives for 'old' products

Various sessions ranging from closet sales, repair workshops, demonstrations and exhibitions aim to educate the public on recycling and extending clothing and footwear use.

3. Event-centred collection

These often feature during national events, e.g. the European Week for Waste Reduction (EWWR) and the European Sustainable Development Week (ESDW). They can also be designed to target remote populations (weekly food market collection points, bus collection points, door-to-door collection, etc.).

4. Youth training

This aims to raise awareness among youths through school challenges, games, and competitions during the year. Examples include, the 'Lâche tes fringues' (Let your clothes go) schools competition (Languedoc Grand-Orb area), and the Alsace Centrale union's collection competition held during EWWR.

Real value added is possible by extending these actions across all local authorities, especially since youth education and event-based collecting appear to be effective levers for learning about sorting and recycling. •

The Circular Fashion Awards

In 2020, Refashion was proud to partner the inaugural Trophées nationaux de la Mode circulaire, which seeks to inspire eco-innovation in the fashion and clothing sector, and to reward products, services and processes that minimise negative environmental impacts. During the event that took place on 16 October 2020 in Lille, Refashion presented the 'Small Business Booster' award to the 3 Tricoteurs bar based in Roubaix, where you can knit with your wool and needles while drinking local specialities.
www.lestroistricoteurs.fr

2020 Events

In 2020, physical meetings and events couldn't be held due to the health situation. Despite this, Refashion was still able to establish partnerships nationwide, which seek to encourage and foster a 'sorting reflex', a second life for used textiles, and a circular economy.

Fashion Green Days

With the aim of re-energising the fashion and textile ecosystem and promoting solutions that reduce the sector's environmental impact, this major national forum gives a voice to fashion industry professionals, experts, and institutions. Since 2018, and thanks to the sharing of sustainable development related experiences and innovations, thousands of participants have seen new projects and collaborations emerge and flourish. Every year, during two days of exhibitions, professional workshops and conferences, Fashion Green Days federates a community of actors working towards the goal of a circular fashion industry. Refashion proudly supports their initiatives.

France Nature Environnement

Refashion and France Nature Environnement (FNE) joined forces to highlight the environmental issues associated with the industry's practices, especially in terms of prevention and waste management, and by working together at the national level to facilitate grassroots actions. As part of this partnership, FNE reached out to the eco-organization to develop, along with ADEME, several training modules addressing issues relating to textiles, household linen and footwear, including a two-part webinar and an online workshop held between 21 and 29 November.

The RE-CYCLAGES exhibition

Refashion partnered with 8 collection and waste treatment eco-organizations to launch the 'RE-CYCLAGES' nomad photo exhibition that ran from 04 Jul to 02 Aug in Toulouse. Alain Fouray's life-size images offer a different lens through which to view the end-of-life journeys for various familiar everyday products and objects, and in this way make people aware of the potential and richness of the materials that can be recycled.

REFASHION: ASSOCIATE MEMBERS GENERAL ASSEMBLY

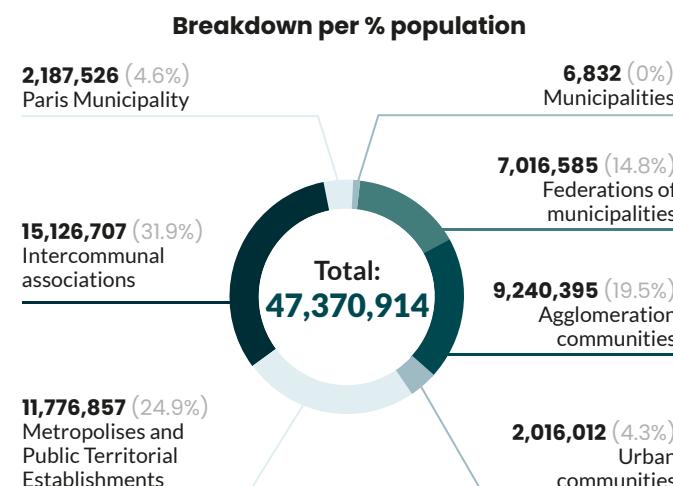
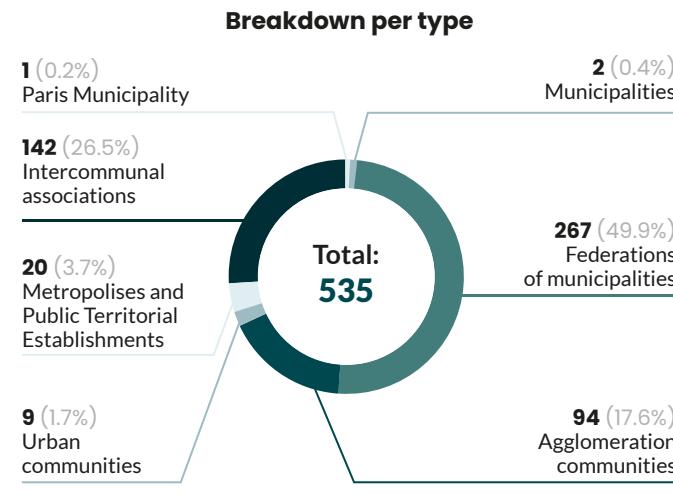
In June 2020, Refashion Board of Directors mandates were renewed for the following 11 brands and federations: Armor Lux, Bunsha (Kiabi), Decathlon, Etam, Galeries Lafayette, LVMH, ID Group, Eram Group, La Redoute, FNH, and USC. Didier Souflet was appointed Chairman of the Board for a second consecutive year. The General Assembly meeting was held as scheduled; this time digitally via videoconference.

Local authorities and the national network in figures

Types of local authorities engaged in the sector in 2020

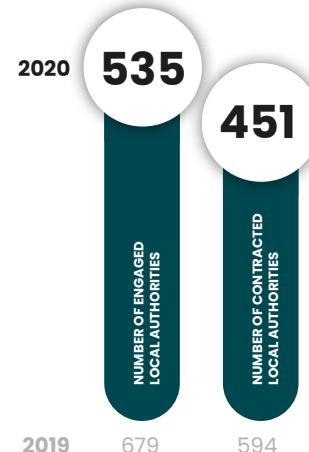
In 2020, 535 local authorities committed to working shoulder-to-shoulder with Refashion in a nationwide drive towards greater recovery rates for used textiles. Indeed, of these, 451 have signed contractual agreements with the eco-organization and, as such, can access support for their 'textile sorting' information campaigns.

2020 was also the year when the eco-organization's accreditation was renewed for a further three years and consequently the local authorities' agreements were similarly renewed. Despite the fact that national municipal elections were also held during a health crisis that forced the second round to be delayed by three months, most of the local authorities renewed their Refashion partnerships. Indeed, only 10% of the relevant local authorities weren't able to renew their partnerships. ...but it's not too late!

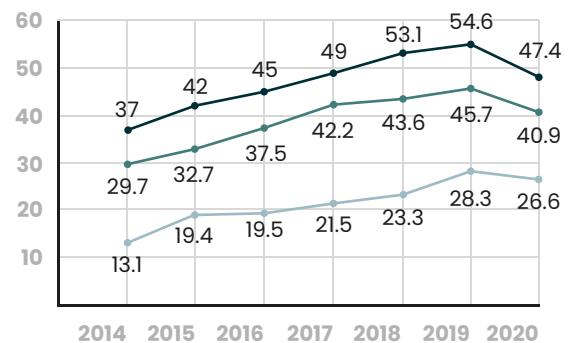


Extraordinary circumstances in 2020

The fall in the number of engaged local authorities from 2019 to 2020 is due both to the expiry of the eco-organization's accreditation on 31 December 2019, and thus the need to renew the authorities' contracts, as well as to a degree of local authority consolidation within larger municipalities. 62% of the population is covered by a contract compared with 70% in 2019. The relative drop is down to contract non-renewals during the year for a number of local authorities.



Changes in local authority involvement (population cohort affected – in millions)



NUMBER OF PEOPLE COVERED BY ENGAGED LOCAL AUTHORITIES

NUMBER OF PEOPLE COVERED BY CONTRACTED LOCAL AUTHORITIES

NUMBER OF PEOPLE COVERED BY ELIGIBLE AND FUNDED LOCAL AUTHORITIES

Financial support paid to local authorities in 2020 for public awareness campaigns conducted in 2019: €2,339,431 million (vs €2,509,041 the year before).

Local authorities: key features...

... Engaged: an authority that is registered with Refashion and that has access to the national sector data and to the Refashion communication kits.

... Contracted: an authority that has signed an agreement with Refashion and can thus benefit under certain conditions from communication support to the tune of 10 cents per inhabitant.

... Supported: an authority that receives financial support in year N+1 to help with its communications budget deployed in year N.

Financial supports	2014	2015	2016	2017	2018	2019	2020
IN € MILLION	1.3	1.9	2	2.2	2.3	2.5	2.3

Collection and Sorting coverage indicators across French regions in 2020

In 2020, collection volumes fell 17.8% and sorted volumes were down by a fifth. The picture has not been uniform with some regions seeing significant falls in collection and sorting, and others experiencing much more modest changes (e.g. Auvergne-Rhône-Alpes, Corsica, Grand-Est and Hauts-de-France).

Among the factors contributing to this disparate landscape are:

- The health crisis and the halt in collection and/or sorting activities for several weeks in some regions along while in others, these activities managed to continue.
- Sorting facilities closures (Île-de-France, Occitanie) and the opening of new facilities (Auvergne-Rhône-Alpes, Nouvelle-Aquitaine).

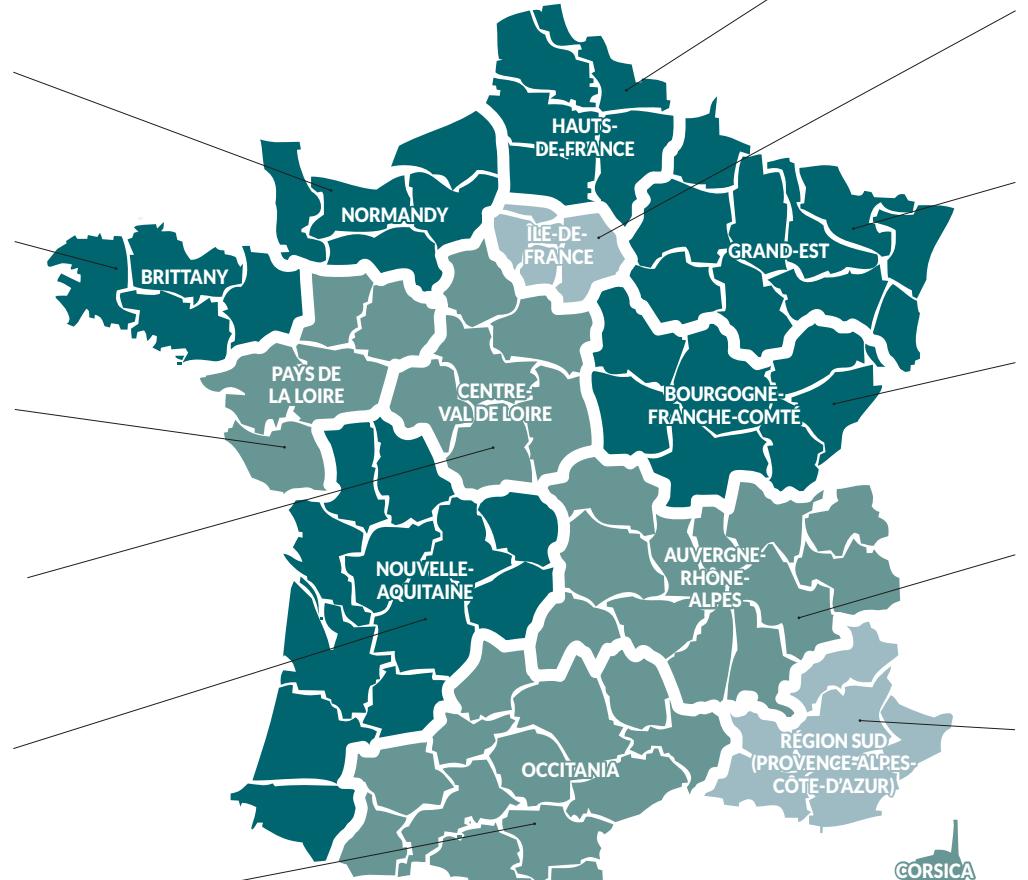
Number of voluntary drop-off points (VDPs) in 2020:

44,633

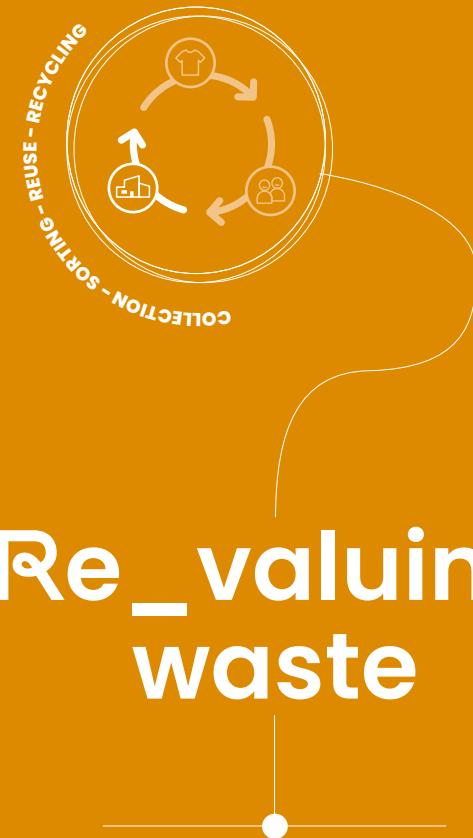
an average of 1 VDP
for 1,490 inhabitants

Average weight collected in kg per year per person:

3.1



- <2.5 KG COLLECTED/PERSON
- 2.6 KG-3.5 KG COLLECTED/PERSON
- >3.6 KG COLLECTED/PERSON



Re_valuing waste

The third phase in a product life cycle is the 'new life' phase, i.e. all the stages that contribute to giving a discarded product another life.

The Textile Industry **is working on two complementary avenues for revaluing 'waste'**:

- **reuse**, i.e. the resale of textiles and footwear that are deemed to be 'wearable';
- **recycling**, where non-reusable textiles are transformed into raw materials to be used in making new products.

In 2020, the pandemic highlighted how heavily dependent the Textile Industry is on foreign trade, both upstream (textiles and footwear imports for sale) and downstream (textiles and footwear exports for reuse and recycling). Indeed, the corresponding export hiatus amply demonstrates how urgently a competitive recycling industry is needed in both France and Europe.

€5 million

is the total amount of **extraordinary, supplementary financial support** that Refashion put in place in 2020 to assist sorting operators during the health crisis.



For a 100% circular textile industry

COLLECTION: An essential stage in phase three of the product life cycle P 36_37

SORTING: Materials sorting – a key challenge P 38_41

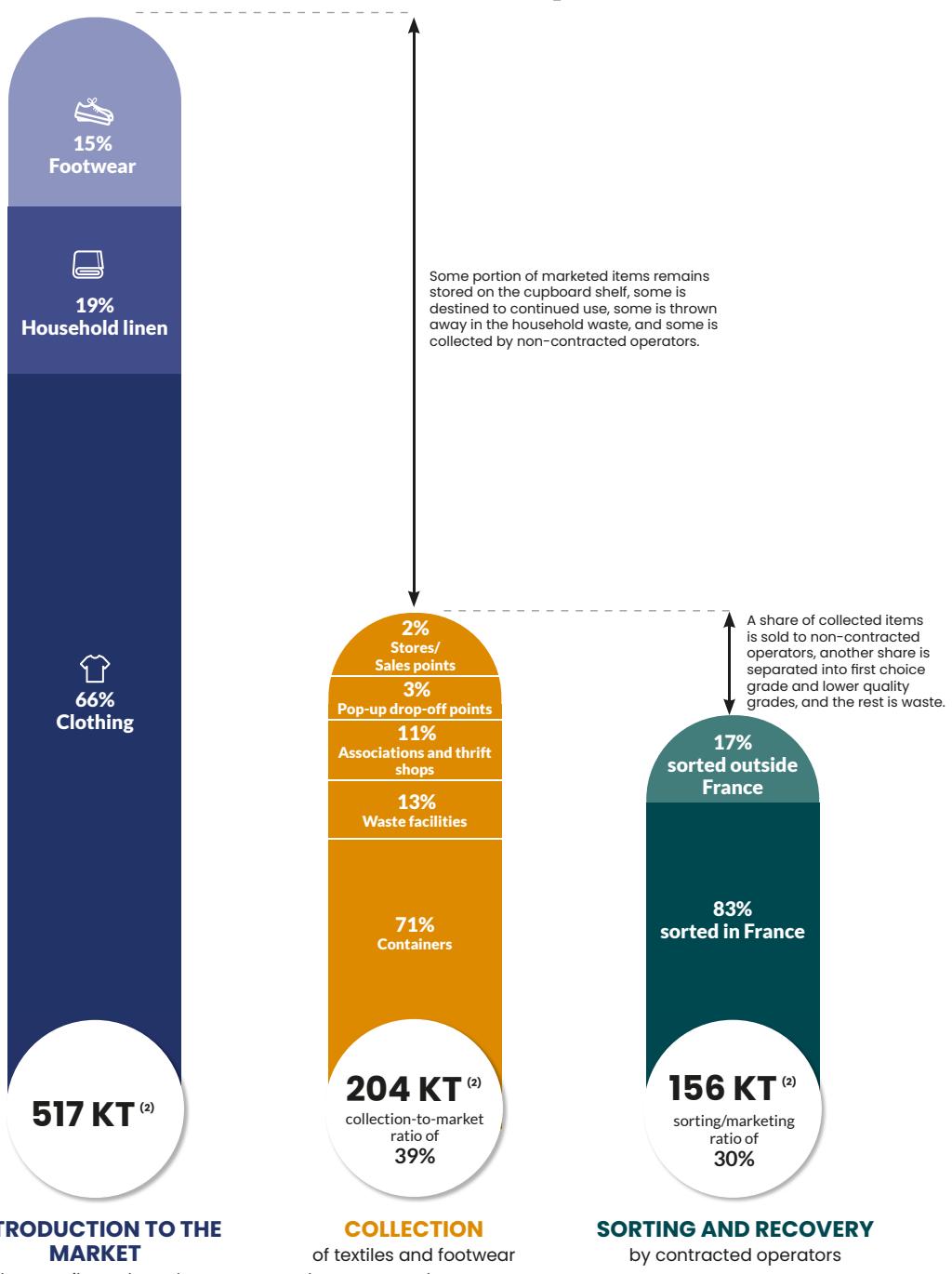
REUSE: The first 'new life' for waste P 42

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APPENDICES: Collection, sorting and recovery in figures (France) P 46_49

French Textile Industry Flows ⁽¹⁾

Re_fashion



COLLECTION

An essential stage in phase three of the product life cycle



2020 was a very challenging year for companies operating in a Textile Industry that saw all its progress indicators register falls. Thus, although the collection of textile and footwear waste is fundamentally key to measuring changes in the sector's performance, it does not provide the full picture.

In 2020, the overall volume of waste collected fell by 54,000 tonnes, while the amount of waste put on the market fell by 130,000 tonnes. While this may have led to a slight improvement in the collection-to-market ratio (39%, vs. 38% in 2019), it still falls short of the 50% target set out in the eco-organization's set of specifications.

Nevertheless, one question does arise, namely should we increase the volumes collected by massively mobilizing the public effort, when as things stand, the sector has no industrial solutions for recycling non-reusable textiles? In these last few months, the health crisis has shown us that once the export market stops operating, collection and sorting automatically halts. Refashion accordingly believes that the priority is to focus resources and effort on industrializing the recycling of non-reusable waste, before going all out into raising the collection rate.

2020 Key Points

► 204,291 tonnes collected (vs. 248,547 in 2019), which represents an average collection rate of 3.1 kilos per year per person (vs. 3.7 kilos in 2019). This is a significant 18% fall from 2019 and is a direct consequence of the COVID crisis. People consumed less, probably kept their textiles and footwear for longer, and because of successive lockdown periods were unable to access the VDPs as easily as in previous years.

► 376 voluntary drop-off point owners counted in 2020 (vs. 340 in 2019). This year, a large number and variety of additional players have become involved in collection. Some structures are operating across several thousand addresses while others are only focused on a handful. Some may be commercial companies, while others are charity organizations. Similarly, some VDP owners are vertically integrated and also manage the sorting activity, while others are reselling the collected 'waste' to sorting operators. This broad panorama makes for broad geographical cover: 1 voluntary drop-off point (VDP) for 1,490 inhabitants (vs. 1 VDP for 1,440 inhabitants in 2019).

► 44,633 voluntary drop-off points (vs. 46,066 VDPs in 2019). A slight 3% decrease in the number of VDPs available in France. Competition is strong among potential VDP owner candidates, and a prize location rarely remains unoccupied. In 2020, eight VDP owners ceased operations (or refocused their businesses), while thirteen new players commenced their VDP businesses.

► The average VDP yield has fallen sharply to just 4.6 tonnes per year (vs. 5.4 tonnes in 2019).

► On-street containers remain the dominant VDP form (64% of the number of VDPs) and the most stable in terms of operator numbers. Associations and shops registered the most significant falls in the number of VDP addresses. •

(1) Data reported to Refashion.
(2) Thousands of tonnes.



Sorting in 2020 by operator category				
% OF TOTAL SORTED	TONNES SORTED	NUMBER OF SORTING FACILITIES	TYPE OF STRUCTURE	
48%	74,791	18	Le Relais	FEDREC member companies: · 31 centers · 64% of tonnage sorted
16%	24,874	13	Independent operators	
10%	15,684	8	Emmaüs charity centers	Entities employing 'job inclusion' personnel > 50%: · 19 centers · 19% of tonnage sorted
9%	14,109	11	Not-for-profit centers	
17%	26,744	14	Companies outside France	· 14 centers · 17% of tonnage sorted
100%	156,202	64	Sorting facilities	

SORTING

Materials sorting – a key challenge



Sorting is the key step in determining the recovery process for collected textile and footwear waste.

Sorting operators are faced with an increasing proportion of non-reusable items. Automated sorting and material preparation lines are becoming increasingly essential and urgent.

Voluntary drop-off point owners first collect textile and footwear items, then sorting operators determine which and how these items are to be directed across the different recovery avenues. This essential stage in the final third of a product's life cycle sees the product classified according to several criteria and then taken along to its new life.

After an initial sorting process that identifies and separates reusable products that will be forwarded for resale as is, the next sorting stage occurs. 'Materials sorting' classifies the non-reusable textiles and footwear according to their composition (100% cotton, 50/50% cotton-polyester, etc.) vis-à-vis recyclers' specifications requirements. In order to be reliable, this sorting stage requires recourse to machines. Several automated sorting technologies exist (including near infrared optical spectroscopy, NIRS) and demonstrators already operate in several European countries such as LLA in Germany, Tomra in Sweden, and Valvan in the Netherlands. For the Textile Industry to achieve successful circular transformation, all the players in the value chain in France and Europe must rise to the challenge of recycling. This transformation will inevitably entail a

much more mechanized sorting stage.

2020 Key Points

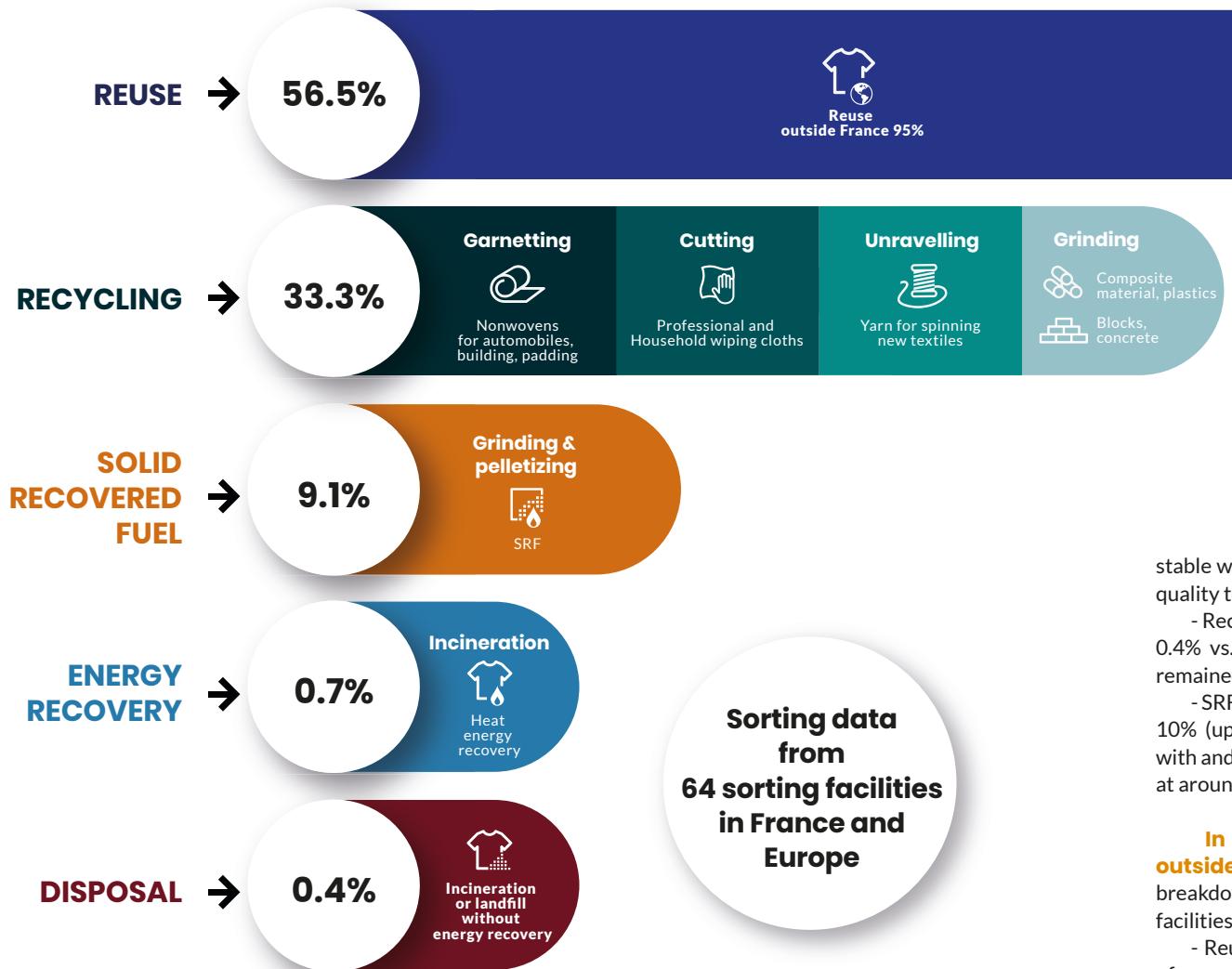
- ▶ 64 approved sorting facilities under contract, (vs. 63 in 2019), including 14 companies in Europe outside France.

- ▶ 156,202 tonnes of textiles and footwear sorted (vs. 196,054 tonnes in 2019), a significant 20% drop linked to lower collection volumes. With activity halting on 15 March 2020, the decline in Q1 volumes was 10%, Q2 volumes fell 63%, while Q3 and Q4 volumes rebounded to match their 2019 equivalents.

- ▶ A gap of 48,000 tonnes between total collected (204,291 tonnes) and total sorted (156,202 tonnes). The size of this gap is relatively stable from year to year and corresponds to 3 types of flows:

- A portion is sent (+/- 70%) to non-contracted operators.
- A portion is separated by operators, mainly associations, into first choice grade and lower quality grades, who then redirect the reusable items to their own stores in France (+/- 25%).
- A residual share remains as waste (+/- 5%), especially when wet or soiled.

A second life for textiles and footwear⁽¹⁾



(1) Sorting in facilities under contract in and outside France.

- ▶ **For the 50 sorting facilities operating in France**, which account for 83% of the total tonnage sorted, below are the changes from 2019 across the main sorting categories:

- Reuse accounts for 56.6% (down 0.9% vs. 2019) and now includes an additional category (reusable curtains and net curtains). The percentage for 1st choice quality items remained



HEALTH CRISIS IMPACT ON WASTE COLLECTION AND SORTING IN 2020

Over several weeks in 2020, the health crisis paralyzed 'downstream' activities: VDP owners regularly couldn't empty the VDP containers. Consequently, sorting operators had to slow or even halt their operating units, and because national borders were closed, they couldn't export the bulk of the sorted items to their usual destinations (India, Pakistan, Sub-Saharan Africa, Tunisia...).

To support operators cope with both storage constraints (sorted materials and those awaiting sorting), and the corresponding fall in their business revenues, Refashion proposed and implemented financial support measures. In consultation with representatives for the sorting operators, local authorities, and public authorities, these measures were split into two types.

Firstly, support was provided to help cover companies' cashflow needs for quarterly arrears related to 2020 production. Secondly, support was provided to help with the costs of processing sorted items for recycling and SRF.

Overall, these provisions have resulted in additional financial support totalling €5 million, and was made possible thanks to the eco-organization's access to the State-guaranteed loan scheme (Prêt garanti par l'Etat).

REUSE

The first 'new life' for textile and footwear waste



Of the used clothing and footwear collected and sorted in 2020, 56.5% will be destined for continued use, that is, they will be resold in the second-hand clothing market (not-for-profit associations or second-hand stores), in France and abroad.

In the waste treatment method hierarchy, reuse takes precedence due to its lower environmental footprint. The Textile Industry is one of only a few with such a high reuse rate. For instance, the continued use/reuse rate in the furniture waste sector is just a modest 10%.

Of the 73,000 tonnes of post-sorting reusable textiles and footwear in France, about 95% was sent to some twenty or so destinations abroad; the largest of which in volume terms are the Maghreb, and Sub-Saharan Africa. Some of the sorted volume also transits through the Benelux countries, Tunisia, and the United Arab



COLLECTED AND SORTED USED TEXTILES

5% resold in France

95% exported



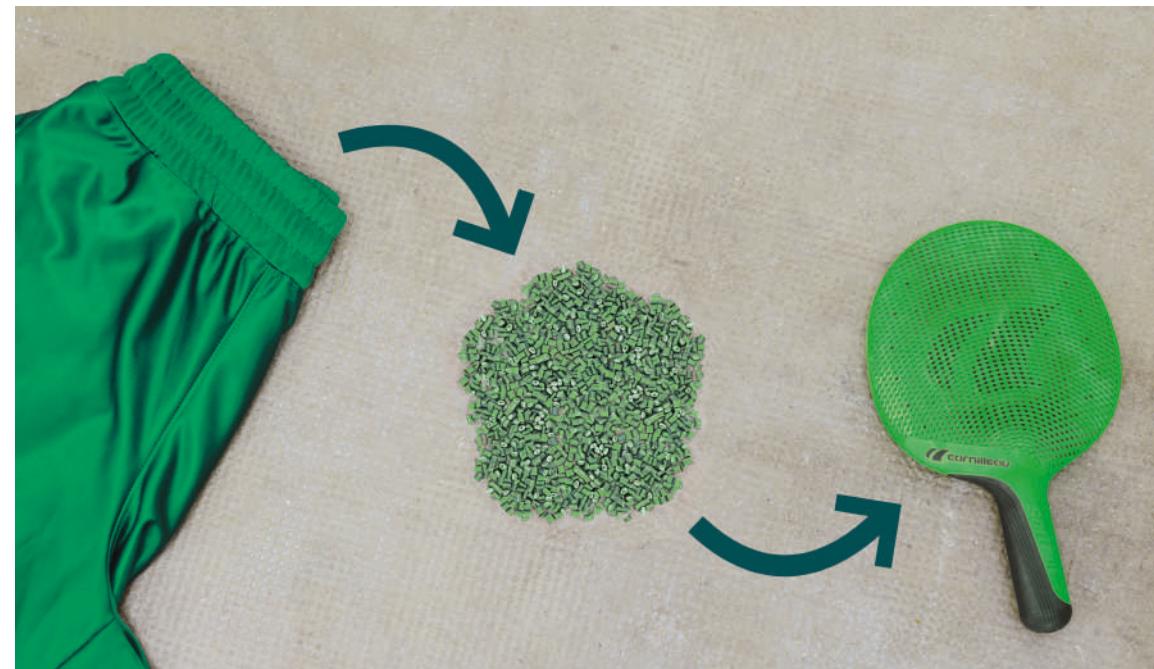
CONTINUED USE OR REUSE?

Continued use extends the life of a product by way of resale, swapping, and gifts between users. When a product is deposited at a recognized drop-off point, it acquires 'waste' status, and once collected and sorted it will be reused, recycled or disposed of.

Emirates (Dubai), where clothes and footwear may be sorted in greater detail before being shipped to the final customer countries.

Reuse rates are slowly but inexorably declining (64% in 2014 vs. 56.6% in 2020), as collection volumes continue to rise. Indeed, the more the public sorts and separates used textiles from their household waste, the more the 'reuse quality' diminishes. This trend towards sorting both more and better, which the public authorities have strongly encouraged, will necessarily redirect the recovery model away from its current primary focus on 'reuse' towards greater recycling. In 2020, and in line with this shift in direction, Refashion started providing and implementing a correspondingly different set of supports.

Insofar as national borders for the sector's client countries have remained closed for a lengthy period over the last year, it is imperative that a recycling industry be developed both in France and in Europe so as to be able to access alternatives to our current export dependency. •



For a 100% circular textile industry

RECYCLING

Towards a 100% circular industry



Accelerating the pace of industrialization for recycling textiles and footwear is the major challenge for the years ahead. Refashion is providing financial support for innovative projects and accompanying actors striving for a 100% circular textile industry.

In order to speed up the development of industrial recycling solutions, the eco-organization continues to support the Textile Industry via two major mechanisms: the Challenge Innovation and downstream working groups.

So what exactly is recycling?

The recycling process consists of transforming non-reusable textiles and footwear into new products such as wipers, geotextiles, fibers and plastic composites. As such, it offers multiple outlets within the closed recycling loop (in the ►

► Textile Industry), as well as and above all in open recycling loops, e.g. in the construction, automotive and plastics industries. Opportunities thus arise to use available materials and save natural resources.

In order to build a comprehensive overview of existing recycling channels for non-reusable textiles and footwear, Refashion has updated the charts mapping the products from recycling used textiles, and tracking the journey for used footwear. These charts are available on the Refashion website.

The 2020 Challenge Innovation

Open to all in France and Europe, the Challenge Innovation has a minimum budget of €500,000 per year, with zero associated investment or fee constraints. Challenge Innovation uses a call to tender formula as it aims to both identify and scale up innovative industrial and commercial solutions

Roundup of the 11 Challenge Innovation competitions

Among the 55 supported projects, 4 new projects are starting in 2021 and 15 are still underway.

From the 36 finalized projects:

- 15 projects have resulted in finalized industrial pilots
- 14 projects have produced compelling results but have not yet secured any industrial development plans
- 7 projects were either not completed or have produced unconvincing results.

Go to refashion.fr/pro/en for more information on the 55 projects that have secured support from the eco-organization as part of the Challenge Innovation since 2010.



SOLIOTI living plant wall (in detail, above, right).

that optimize the recycling of households' used textiles and footwear, as well as to accelerate the development of a more circular industry, in synergy with other sectors, such as construction, automobiles, etc. With this in mind, the candidate projects must be in the TRL (technology readiness level) range of 4 to 6, corresponding to the prototype development stage that then leads on to industrial demonstrators.

More than 30 companies expressed interest in this 11th Challenge Innovation. After the Scientific Committee's selection process, the jury recommended four projects to the Refashion Board of Directors, for a total of €420,000 in financial support.

Since 2010, the eco-organization has committed more than €5 million to the co-financing of 55 ambitious projects selected by the Challenge Innovation jury, all of which have aimed at optimizing the recycling of textiles and footwear. This collaborative body is made up of some twenty experts from the Scientific Committee who also assist the eco-organization in following up with the successful candidates, and Refashion thanks them all warmly for their ongoing commitment. •

FOUR CHALLENGE INNOVATION PROJECT WINNERS IN 2020

These four winning projects in 2020 will commence operations in 2021.

- 1. Eram Group – ZAPATEKO II:** using the Group's expertise to disassemble used shoes.
- 2. Phenix Sport – R-SHAPE:** recycling sports shirts into plastic composites for further educational tools and equipments.
- 3. SOEX Group – TexID:** industrialization of an experimental automated textile sorting line.
- 4. VERT-tical Nord – SOLIOTI:** a new generation of eco-responsible living plant walls.



INNOVATION MAGAZINE

Innovation magazine #09 was published in June 2020. In it you can find all the details of the 2019 Challenge Innovation.



FLASH:

TWO NEW PROMISING WORKING GROUPS

Spotlight on two priority segments for recycling textile and footwear waste, namely '**Nonwovens in automotive'** and '**Composites**'.

Steered by experts, these working groups seek to identify eco-responsible processes and business models, by way of various sorting and materials preparation experiments undertaken with support from Refashion.

► In 2020, the 'Nonwovens in automotive'

working group developed several promising samples of **high-acoustic performance nonwoven felts**, which include up to 70% recycled textiles and which can be used in various automobile parts, such as door panels, instrument panels, and trunk linings. Felts finalized in 2021 will go on to be the target products for sorting operators undertaking sorting and material preparation experiments.

► The 'Composites' working group

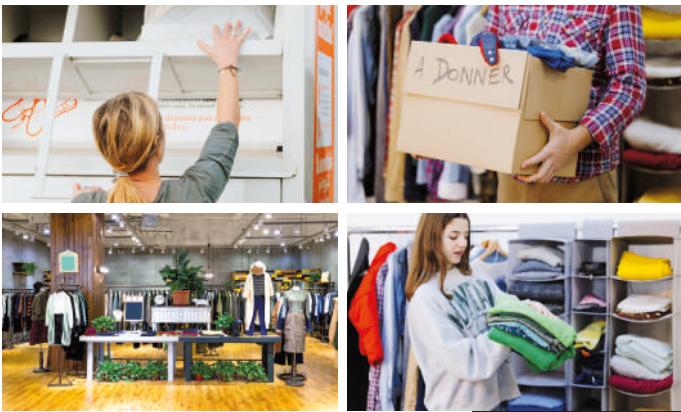
uses recycled yarn from textiles to create **high value-added composites**. This ambitious program draws in large part on R&D and is still in progress.

Collection, sorting and recovery in figures (France)

VDPs in France	2014		2019		2020		2020 vs. 2019
	Type	Number of VDPs	% of VDPs	Number of VDPs	% of VDPs	Number of VDPs	% of VDPs
ASSOCIATIONS / THRIFT SHOPS	2,422	6.9%	5,132	11.1%	4,053	9.1%	- 21%
SHOPS / POINTS OF SALE	393	1.1%	1,564	3.4%	1,414	3.2%	- 9.6%
CONTAINER	29,764	84.5%	35,250	76.5%	34,887	78.1%	- 1%
OF WHICH:							
- PUBLIC AREA	23,902		28,826		28,709	64.3%	- 0.4%
- PRIVATE AREA WITH PUBLIC ACCESS	5,442		5,929		5,179	11.6%	- 12.7%
- PRIVATE AREA NO PUBLIC ACCESS	420		778		999	2.2%	28.4%
WASTE FACILITIES	2,494	7.1%	3,035	6.6%	3,164	7.1%	4.3%
POP-UP DROP-OFF POINTS ⁽¹⁾	110	0.3%	1,096	2.4%	1,116	2.5%	1.8%
TOTAL	35,183		46,077	100%	44,633	100%	- 3.1%

(1) Temporary collection at a VDP address.

The total number of voluntary drop-off points (VDPs) has fallen (- 3% 2019 vs. 2020). This is due to the cessation or slowdown in business by a number of VDP owners during 2020.
Noteworthy: the number of waste disposal center drop-off points saw a sharp rise in 2020 and since 2014, door-to-door collections has fallen, while in-store in-store collection has grown.



Four voluntary drop-off point (VDP) types used across France:
public roadside containers, gift drop-offs with associations, in-store collection, and events-based and one-off collection (from top left to right, bottom left to right).

Sorting facilities Data – 2020 vs. 2019 (France)

FRANCE	2009	2011	2014	2018	2019	2020 ⁽¹⁾	2020-2019
TONNES SORTED	76,262	100,720	125,004	160,262	160,439	129,408	- 19.3%
1 ST CHOICE			4.6%	5.6%	5.3%	5.4%	+ 0.1
OTHER CHOICES			55.1%	46.9%	46.3%	45.4%	- 0.9
FOOTWEAR			5.3%	5.3%	5.9%	5.8%	- 0.1
CURTAINS/NET CURTAINS						0.01%	
REUSE	55%	59.3%	65%	57.8%	57.5%	56.6%	- 0.9
GARNETTING	17%	21.4%	20%	22.8%	23.3%	23.4%	+ 0.1
WIPERS	10%	8.7%	8.3%	9.6%	9.3%	8.7%	- 0.6
RECYCLING	27%	30.1%	28.3%	32.4%	32.6%	32.2%	- 0.4
RECOVERY AS SRF ⁽²⁾	0%	0%	4.8%	8.6%	9.1%	10.4%	+ 1.3
RECOVERY AS SRF AND MATERIALS	82%	89.4%	98.1%	98.8%	99.2%	99.2%	0
DISPOSAL	18%	10.6%					0
WITH ENERGY			0.7%	0.3%	0.3%	0.4%	+ 0.1
WITHOUT ENERGY			1.2%	0.9%	0.5%	0.4%	- 0.1
TOTAL	100%	100%	100%	100%	100%	100%	

(1) Results prior to audit.
(2) Solid Recovered Fuel.

The 31,000 tonne fall in sorted materials (- 19.3% vs. 2019) mirrors that in collection volumes and is directly linked to the health crisis.

At 99.20%, the recovery percentage remains robust, while the balance has shifted from reuse (- 1% point) towards SRF (+ 1.3% point).

Employment in France	2009	2011	2014	2017	2018	2019	2020
TOTAL FTE ⁽¹⁾			2,057	2,455	2,495	2,443	1,971
OF WHICH:							
- IN SORTING	824	975	1,279	1,547	1,505	1,483	1,193
- IN JOB INSERTION SCHEMES	330	439	587	763	342	419	522
AS A % OF FTE – SORTING	40%	45%	46%	49%	23%	28%	44%
PRODUCTIVITY – SORTING (t/FTE)	93	103	98	102	106	108	108

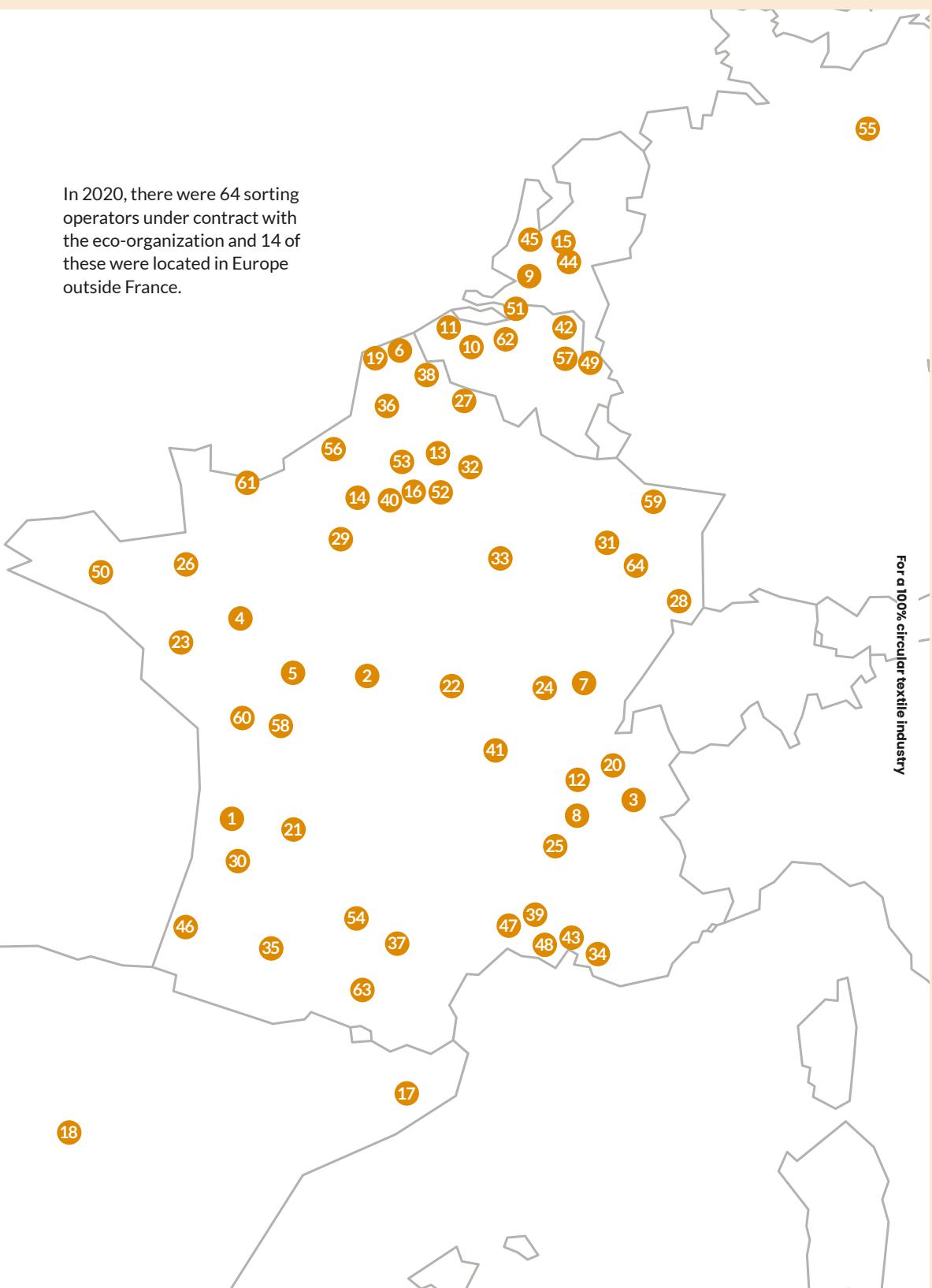
(1) FTE: full-time equivalent jobs.

Total number of jobs reported by sorting operators represents some 2,000 full-time equivalent (FTE) positions in France, almost 1,200 of which are specifically directed to sorting.

64 sorting operators under contract

1. ACTIFRIP 33240 SAINT-ANDRE DE CUBZAC - FRANCE	19. KFB SOLIDAIRE 62320 SAINT-LEONARD - FRANCE	38. LE RELAIS NPDC - BRUAY 62700 BRUAY LA BUISSIERE - FRANCE	55. SOEX PROCESSING GERMANY GMBH 22926 AHRENSBURG - GERMANY
2. AGIR 36000 CHATEAUROUX - FRANCE	20. LA FIBRE SAVOYARDE 74540 SAINT-FELIX - FRANCE	39. LE RELAIS PROVENCE 84000 AVIGNON - FRANCE	56. SOLIDARITE TEXTILES 76770 LE HOULME - FRANCE
3. ALPES TLC 73200 GILLY-SUR-ISÈRE - FRANCE	21. LA TRESSE 24400 LES LECHEES - FRANCE	40 . LE RELAIS VAL DE SEINE 78570 CHANTELOUP LES VIGNES - FRANCE	57. TERTEX 4040 HERSTAL - BELGIUM
4. APIVET 49100 ANGERS - FRANCE	22. LE LIEN 58240 LANGERON - FRANCE	41. LE TRI D'EMMA 42300 VILLEREST - FRANCE	58. TIO CREATEX SARL 86400 SAINT-SAVIOL - FRANCE
5. AUDACIE 86100 CHATELLERAULT - FRANCE	24. LE RELAIS BOURGOGNE 71380 SAINT-MARCEL - FRANCE	42. LIMBOTEX 3990 PEER - BELGIUM	59. TRI D'UNION 57460 BEHREN LES FORBACH - FRANCE
6. AUDIO-TRI 62500 SAINT-MARTIN-LEZ-TATTINGHEM - FRANCE	25. LE RELAIS BOURGOGNE - LE RELAIS 42 42410 PELUSSIN - FRANCE	43. MAGREG 13015 MARSEILLE - FRANCE	60. TRIO 79000 NIORT - FRANCE
7. CTFC 39230 SELLIERES - FRANCE	26. LE RELAIS BRETAGNE 35690 ACIGNE - FRANCE	44. MARBO RECYCLING BV 4782 SM MOERDIJK - NETHERLANDS	61. TRITEX NORMANDIE 14650 CARPIQUET - FRANCE
8. ECO TRI INTERNATIONAL 38260 LA FRETTE - FRANCE	27. LE RELAIS CAMBRESIS 59292 SAINT-HILAIRE-LES-CAMBRAI - FRANCE	45. OFTEX TEXTIEL RECYCLING BV 3088 ROTTERDAM - NETHERLANDS	62. VANBREUZE PRODUCTIONS SA 9320 EREMBODEGEM - BELGIUM
9. EURO USED CLOTHING 4761 RK ZEVENBERGEN - NETHERLANDS	28. LE RELAIS EST 68270 WITTENHEIM - FRANCE	46. Ouateco 40230 SAINT-GEOURS-DE-MAREMNE - FRANCE	63. VERTEX 09300 LAVELANET - FRANCE
10. EUROFRIP 9870 ZULTE - BELGIUM	29. LE RELAIS EURE ET LOIR 28170 FAVIERES - FRANCE	47. PHILTEX & RECYCLING 30128 GARONS - FRANCE	64. VOSGES TLC 88150 CAPAVENIR - FRANCE
11. EVADAM NV 08800 ROESELARE - BELGIUM	30. LE RELAIS GIRONDE 33300 BORDEAUX - FRANCE	48. PROVENCE TLC 13127 VITROLLES - FRANCE	
12. EVIRA 38490 SAINT-ANDRE-LE-GAZ - FRANCE	31. LE RELAIS LORRAINE 54170 ALLAIN - FRANCE	49. RECYTEX EUROPE 4100 SERAING - BELGIUM	
13. FRAMIMEX 60400 APILLY - FRANCE	32. LE RELAIS NORD EST ILE DE FRANCE 02200 PLOISY - FRANCE	50. RETRITEX 56308 PONTIVY CEDEX - FRANCE	
14. GEBETEX TRINORMANDIE 27200 VERNON - FRANCE	33. LE RELAIS NPDC - R10 10600 LA CHAPELLE SAINT-LUC - FRANCE	51. RIMATEX BVBA 9100 SINT-NIKLAAS - BELGIUM	
15. GEBOTEX 3316 BC DORDRECHT - NETHERLANDS	34. LE RELAIS NPDC - R13 13014 MARSEILLE - FRANCE	52. SOCIETE DE DISTRIBUTION DE VETEMENTS (95) 95200 SARCELLES - FRANCE	
16. HERSEND 2ND HAND CLOTHING 95200 SARCELLES - FRANCE	35 . LE RELAIS NPDC - R32 32230 MARCIAC - FRANCE	53. SOCIETE DE DISTRIBUTION DE VETEMENTS (60) 60430 PONCHON - FRANCE	
17. HUMANA BARCELONE 08480 L'AMETLLA DEL VALLES - SPAIN	36. LE RELAIS NPDC - R80 80830 L'ETOILE - FRANCE	54. SOCIETE DE RECUPERATION DE CHIFFONS EUROPENNES (SRCE) 81800 RABASTENS - FRANCE	
18. HUMANA MADRID 28914 LEGANES - SPAIN	37. LE RELAIS NPDC - R81 81660 BOUT DU PONT DE L'ARN - FRANCE		

In 2020, there were 64 sorting operators under contract with the eco-organization and 14 of these were located in Europe outside France.



Key performance indicators for the sector

Ever since 2009, the eco-organization has been precisely observing and measuring the changes in the sector's key performance indicators.

	ACCREDITATION 2009-2013	ACCREDITATION 2014-2019	ACCREDITATION 2014-2019	ACCREDITATION 2020-2022
	2009	2014	2019	2020
Member organizations (companies & federations)	+/- 4,000	4,600	4,019	4,096
NUMBER OF MEMBERSHIP AGREEMENTS	1,727	1,650	1,519	1,580
NUMBER OF ITEMS PUT ON THE MARKET (IN BILLIONS)	2.3	2.5	2.9	2.4
EQUIVALENT AMOUNT IN TONNES ESTIMATED	700,000	600,000	648,000	517,200
AMOUNT OF ECO-FEES IN € MILLIONS	11.6	15.8	25.6	34.5
OF WHICH ECO-MODULATED ITEMS (%)	0%	0.03%	2.1%	0.7%
AVERAGE FEE PER CHF ITEM	€0.005	€0.0063	€0.0089	€0.0127
FEE IN €/TONNE PUT ON MARKET	€16.6	€26.3	€39.4	€60

Raising public awareness over sorting practices	2009	2014	2019	2020
NUMBER OF REGISTERED LOCAL AUTHORITIES (INCL. UNDER CONTRACT)	0	870	679	535
NO. OF PEOPLE COVERED BY REGISTERED LOCAL AUTHORITIES	0	37,252,749	54,647,067	47,370,914
NUMBER OF CONTRACTED LOCAL AUTHORITIES	0	522	594	451
NO. OF PUBLICITY CAMPAIGNS REPORTED WITH RESPECT TO PREVIOUS YEAR	0	996	960	858
AMOUNT OF FUNDING FOR PUBLIC RELATIONS CORRESPONDING TO PREVIOUS YEAR	0	€1,310,438	€2,509,041	€2,339,431

Collection of post-consumer CHF	2009	2014	2019	2020
TONNES COLLECTED	125,000	175,000	248,547	204,291
WEIGHT COLLECTED PER INHABITANT (KG)	2	2.7	3.7	3.1
NUMBER OF VDPS (VOLUNTARY DROP-OFF POINTS)	0	34,650	46,066	44,633
TONNES COLLECTED PER VDP	0	5.1	5.4	4.5
NUMBER OF MUNICIPALITIES WITH AT LEAST ONE VDP			16,310	16,383
PEOPLE WITH VDP ACCESS (LIVING IN MUNICIPALITIES THAT PROVIDE FACILITIES)			54,702,352	58,747,334
				58,949,329

Sorting and destination for sorted materials	2009	2014	2019	2020
NUMBER OF CONTRACTED AND REPORTING SORTING FACILITIES / OF WHICH IN FRANCE	40	60 / 43	63 / 49	64 / 50
TONNES SORTED / OF WHICH IN FRANCE	85,719	153,602 / 79%	196,054 / 81.5%	156,202 / 82.9%
AVERAGE TONNES PER SORTING FACILITY	2,143	2,560	3,112	2,438
RECOVERY % FROM SORTED TONNAGE (INCL. ENERGY RECOVERY)	81%	99.1%	99.5%	99.6%
OF WHICH: REUSE	58%	64.1%	57.8%	56.5%
MATERIALS FOR GARNETTING	14%	20.2%	23.4%	23.6%
WIPERS	9%	9.3%	10.1%	9.7%
SOLID RECOVERED FUEL (SRF IN MATERIALS RECOVERY)	0%	4.3%	7.6%	9.1%
DISPOSAL THROUGH INCINERATION WITH ENERGY RECOVERY	0%	1.2%	0.6%	0.7%
DISPOSAL WITHOUT ENERGY RECOVERY	19%	0.9%	0.5%	0.4%
FUNDING ALLOCATED TO SORTING	€6,373,000	€10,817,419	€16,018,197	€16,999,640

Studies and R&D projects	2009	2014	2019	2020
NUMBER OF R&D PROJECTS FUNDED SINCE 2010	0	18	52	55
CUMULATIVE FUNDING FOR R&D SINCE 2010	0	€1.8 MILLION	€4.2 MILLION	€5 MILLION

Financial situation

Operating account in €

	2019	2020	CHANGE
Operating revenue in €			
FEES	25,552,842	34,563,207	35%
OTHER INCOME INCL. REVERSAL OF PROVISIONS	4,513,721	2,253,471	-50%
TOTAL REVENUE	30,066,563	36,816,678	22%
Operating expenses in €			
COST OF FUNDING FOR SORTING	16,018,197	16,999,640	6%
COST OF FUNDING FOR LOCAL AUTHORITIES	4,567,573	4,091,006	-10%
COST OF FUNDING FOR R&D	801,026	729,307	-9%
SUB-TOTAL (FUNDING EXPENSES)	21,386,796	21,819,953	2%
Other expenses in €			
OTHER PURCHASES AND EXTERNAL EXPENSES	1,686,769	1,957,297	16%
OF WHICH: CONSULTANCY, STUDIES AND AUDIT FEES	739,159	803,894	9%
PUBLIC RELATIONS	496,590	740,578	49%
CURRENT OPERATING EXPENSES	451,020	412,825	-8%
TAXES AND FEES	13,115	70,482	437%
PAYROLL EXPENSES	972,997	1,134,387	17%
DEPRECIATION ALLOWANCE	138,178	63,347	-54%
PROVISIONS AGAINST CURRENT ASSETS	318,824	1,950,846	512%
PROVISIONS FOR FUTURE EXPENSES	5,599,026	9,850,392	76%
OTHER EXPENSES INCLUDING EXCEPTIONALS	4,476	2,050	-54%
SUB-TOTAL (OTHER EXPENSES)	8,733,385	15,028,802	72%
TOTAL EXPENSES	30,120,181	36,848,755	22%
RESULTS IN €			
NET OPERATING PROFIT/LOSS	-53,618	-32,076	-40%
FINANCIAL INCOME AND EXPENSES	53,618	32,076	-40%
CORPORATION TAX	0	0	
NET PROFIT/LOSS	0	0	

Balance sheets for 2020–2021 compared

Assets	2019	2020
FIXED ASSETS		
INTANGIBLES	€35,723	€217,358
TANGIBLES		
NON-CURRENT FINANCIAL ASSETS		
CURRENT ASSETS		
INVENTORY		
RECEIVABLES	€27,535,414	€37,958,122
SECURITIES	€2,002,346	€2,704,847
LIQUID ASSETS	€15,441,318	€15,141,554
PREPAID EXPENSES	€21,867	€19,675
TOTAL	€45,036,668	€56,041,556
Liabilities	2019	2020
EQUITY CAPITAL		
CAPITAL	€40,000	€40,000
RESERVES		
EARNINGS		
PROVISIONS	€17,013,251	€26,863,644
DEBTS		
FINANCIAL LIABILITIES	€300	€6,388,000
SUPPLIER DEBTS	€23,038,766	€15,800,860
TAXES AND PAYROLL	€4,680,641	€6,661,580
OTHER LIABILITIES	€263,709	€287,473
UNEARNED INCOME		
TOTAL	€45,036,667	€56,041,556

Indicative financial plan for 2021

Funding for recovery of sorted waste

NO. TONNES	190,000
CHANGE	22%
TOTAL AMOUNT	€24,700,000

Funding (investment) for sorting development

NO. TONNES	6,000
CHANGE	
TOTAL AMOUNT	€300,000

Support for sorting material

NO. TONNES	10,000
CHANGE	
TOTAL AMOUNT	€1,500,000

Funding for public relations carried out by local authorities

NUMBER OF INHABITANTS SERVED	45,000,000
CHANGE	10%
TOTAL AMOUNT	€4,500,000

FUNDING FOR R&D

FUNDING FOR R&D	€1,000,000
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EXPENSES EXCL. FUNDING

EXPENSES EXCL. FUNDING	€4,721,482
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TOTAL EXPENSES

TOTAL EXPENSES	€36,721,482
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The Refashion team

The Refashion team grew in 2020, adding experience in communications, eco-design, innovation, and data in order to better meet the new goals the eco-organization has set en route for a 100% circular industry. Meet the Team.

1. CÉCILE MARTIN

Innovation and Recycling
Project Manager

2. ADÈLE ROUTHIAU

Eco-design Project Manager

3. MARION LENOBLE

Communications
Manager

4. ALAIN CLAUDOT

Chief Executive

5. LAURENCE ERMISSÉ

Local Authority
Liaison Manager

6. MAUD HARDY

Circular Economy Director

7. OANA PESQUER

Head of Accounts & Administration

8. STÉPHANIE RICHARD

Back and Front Office
Coordinator

9. SANDRA BALDINI

Marketing & Communications
Director

10. LINDA LE BOULANGER

DATA and IS Manager

11. HÉLÈNE DARET

Brand Director

12. NARIMÈNE SAHLI

Head of Membership
Management



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For a 100% circular Textile Industry:

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Reuse

Recycle

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