

Re_fashion

2021 Activity report



Re_think production
Re_design consumption
Re_generate materials

Refashion is the textile industry's eco-organisation

Growing

by **Didier Souflet** *Refashion CEO*

For all players in the textile industry 2021 was yet again a complicated year to manage. Despite turbulent times everyone is adapting to meet the challenges that we are facing.

For the eco-organisation, 2021 was a year that, in the middle of the 2020-2022 transitional authority approval, marked an initial acceleration with major changes to be embraced and anticipated. Regulations (with the very structuring French AGEC law - Anti-waste and Circular Economy), IPCC reports and public opinion that is more aware of the climate crisis, are all factors that require our commitment to do more and to grow. To grow via our projects, our team, and in our ambitions, with:

- More tools, webinars and education in order to **assist marketers** in their virtuous development, in eco-design and in applying the regulatory framework.
- The **“Your clothing has a future”** public awareness-raising campaign, the culminating point being the #RRRR campaign which includes new stakeholders and reaches out to an ever increasing number of citizens.
- The development potential of **regeneration** thanks to the launch of the Recycle platform and to working groups specifically focusing on innovation and to the Materials Sorting and Preparation Committee.
- More convergence and commitment at a European level within the “Sustainable Textiles/Green Deal” context for an environmental assessment method that is currently being standardised and which positions Refashion as a reference baseline.

Growing and developing, this is also the case for our associates that I, along with the Board of Directors, represent with the arrival of Minelli and Richard-Pontvert (Paraboot). This is also the case for the operations team where new talents have arrived and, lastly, it is also the case of Refashion’s General Management with the arrival of Maud Hardy in January 2022.

Maud has both my full confidence and that of the Board’s, to engage Refashion in this new era marked by an increase in financial resources (in two years, the eco-fees have risen from 26 million Euros in 2019 to 51 million Euros in 2021). Our challenge is to increase our assistance to brands in eco-design, by providing better information to the public on the behavioural changes required and by promoting the conditions for the emergence and sustainability of the recycling industry in France and in Europe.

I would like to thank Alain Claudot whose unfailing energy and commitment has led the eco-organisation to where it is today. He built a team of highly motivated experts, ready to lead a transformation project, i.e. new ways in producing, consuming and regenerating used textiles into new resources.

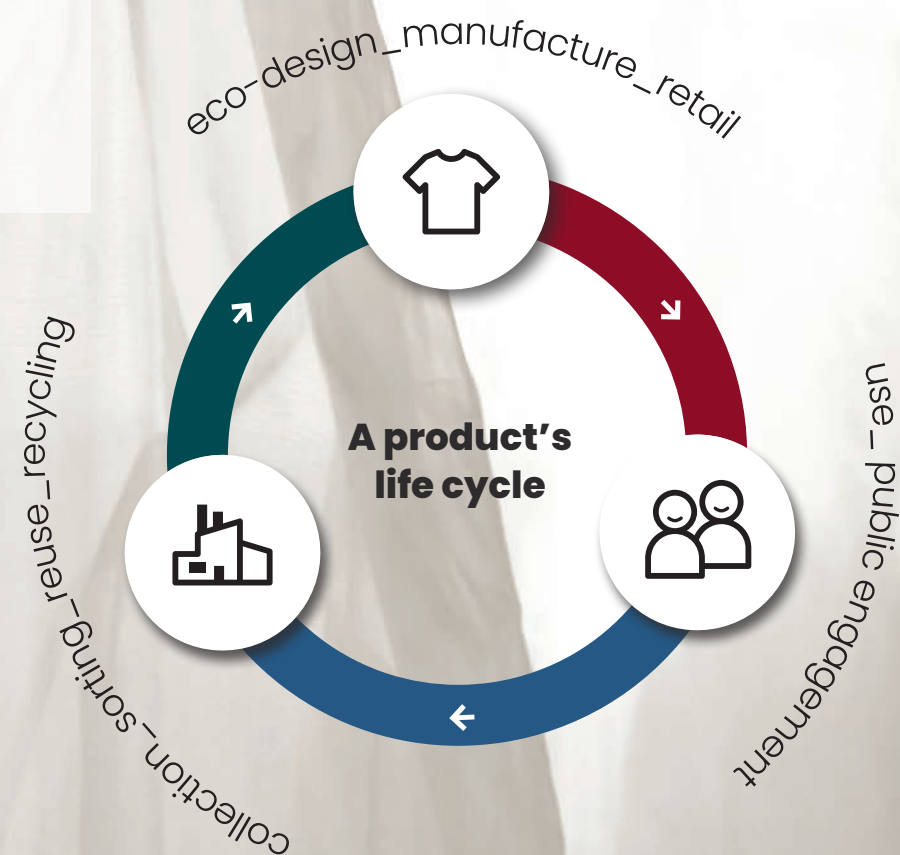
The unstable period that we are experiencing is also an opportunity to accelerate the transition towards an environmentally **responsible and circular textile industry.**

It’s this **ambitious project** that I would like to share with you.



Re_generate materials
A new lease of life for used products

Re_think production
Committed brands



Re_design consumption
Responsible consumers

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Refashion continues its commitment

The year 2021 marks a pivotal moment for our eco-organisation and for the entire clothing and footwear industry.

Within a context of profound changes, the circular economy, which struggled to impose itself as global priority, has become crucial. The figures for the industry speak for themselves: out of **715,290 tonnes of clothing and shoes** placed onto the French market in 2021, **only 34% were collected for recovery purposes and essentially for export.** Still too often criticised for its environmental impact, our industry must continue its initiatives and build its future based on a responsible and exemplary model.

More than ever before the transformation towards a fully circular economy requires commitment by all.

What guides our work

We are rallying to reposition environmental benefits at the centre of our Extended Producer Responsibility (EPR) procedures. We support the development of a sustainable clothing and footwear recycling industry whilst meeting legitimate expectations by the sector's stakeholders regarding transparency and traceability. To meet these objectives, we have focused on 3 key stages in a product's life cycle.

1. Production

Products that are placed onto a market must be treated as future resources and must thereby be designed and developed as such. The purpose is to incite all brands to be engaged in assessment procedures and to reduce the environmental impact of their business and what they produce.

2. Consumption

Via local awareness-raising campaigns and national initiatives, consumers must be given clear information about the environmental impacts of the products they buy. Responsible consumption - consuming better and less - must be encouraged as well as the length of time a product is used thanks to redeployment, repair and reuse.

3. Regeneration

By 2030, our ambition in France and in Europe is to transform all waste from the textile industry into new resources through an efficient and value-creating recycling industry.

The industry is focusing work in two complementary recovery areas: reuse (or the resale of clothing and footwear still considered to be wearable) and recycling (or the transformation of non-reusable clothing into new materials to be incorporated into new products). Today the industry needs investment and to be assisted in order to optimise its model's circularity.



Refashion, an inspirational French model for Europe

French and European regulations are changing. European Directives on the "Circular Economy Package" include the obligation to separately collect used clothing and footwear as from January 2025 for all of its member States.

The implementation of a streamlined textile EPR system at a European level is more than ever before essential, with directives and objectives not only focused on the separate collection of used clothing, but also and above all on the quantitative and qualitative conditions to transform waste into new resources. The EPR must in particular assist in the development of a European recycling industry.

The second lease of life of clothing and footwear is no longer an option to guarantee our planet's future. It is a duty, in which the European Commission plays an essential role in defining the new regulatory framework.

2021 Key figures from the textile industry

Regeneration

Collection

244,448T
collected

44,829
Self-deposit banks (SDB)

Sorting

190,548T
Sorted

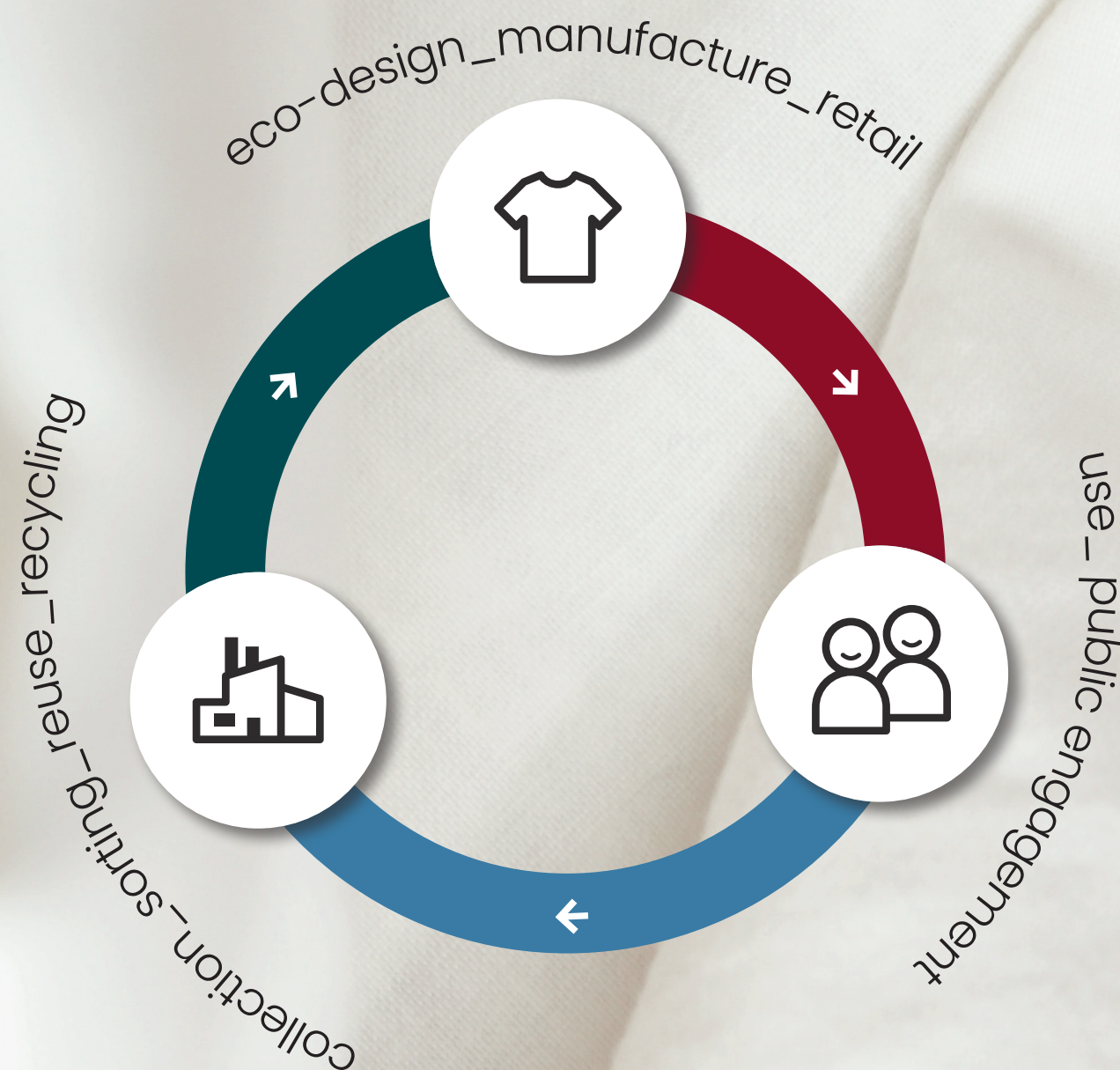
€23M
Of funding paid

TO
66
Sorting centres having signed a contract

Research & Development

60
Projects supported by Refashion since the creation of the Innovation Challenge

€5.6M
Of support committed over the last 11 years



Production

715,290T
Of products placed on the market

€51.1M
of eco-fees paid by marketers

More than 6,000
Member brands

2.8Bn
Products marketed

OF WHICH

49M
Are eco-modulated products

Consumption

563
Local authorities registered

802
Initiatives supported in 2021 in relation to communication initiatives carried out in 2020

€2.5M
Of funding paid to local authorities in 2021 in relation to communication initiatives carried out in 20200

37M
Views on the social networks on the national #RRRR campaign

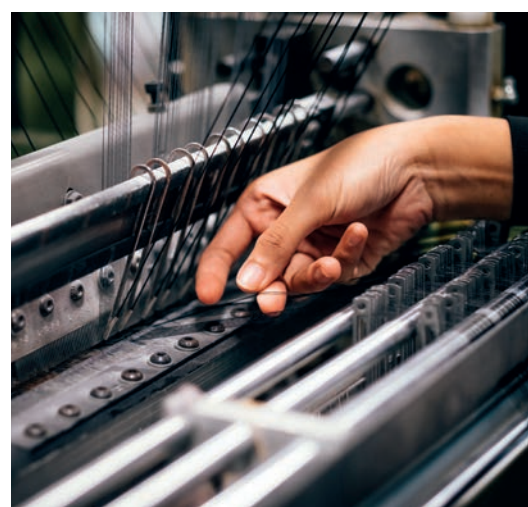
Re_ think production



Re_think production

REFASHION

2021 marks the beginning of a revival, following the exceptional Covid-19 pandemic. Indeed, the amount of items placed onto the market in 2021 nearly returned to 2019 levels with 2.8 billion items. This revival however reveals an upheaval in the cost structures of products and a very turbulent international context. 2021 is also a year that affected the implementation of some of the provisions in the AGEC law: for example the unique identification number and the “Info-tri” symbol. These new measures have had a direct influence on marketers in the product development cycle. This is why the Refashion eco-organisation deploys educational tools and provides support. **Review of this year’s highlights with its wealth of new developments.**

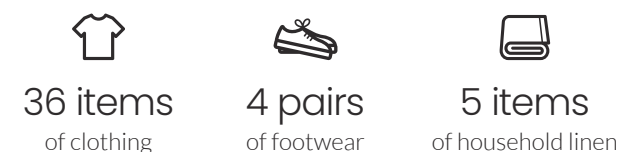


A brief moment in the textile industry

Every year, member companies declare to Refashion the quantities of products placed onto the market the previous year. This enables the eco-organisation to build a quantitative picture of the breakdown of annual clothing and footwear sales in France, as well as to

measure the changes from year to year. In an industry where data is a key element for managing collection operations, this compiled data, provided to marketers, is a precious source of information.

In 2021 each person in France bought on average:



i.e. 10.5kg of clothing and footwear/year/inhabitant
In 2021, 2.8 million items were placed onto the market, corresponding to 715,000 tonnes, which is the equivalent in weight of 71 Eiffel Towers!

Did you know?

In 2021, trainers accounted for about 40% of footwear sold in France: nearly 37 million pairs were purchased by men, compared to 26 million for children and 27 million pairs by women. However women remain the highest consumers of footwear with a total of 83 million pairs purchased throughout the year.



FOR A 100% CIRCULAR INDUSTRY

Refashion glossary

- _ ERP:** Extended Producer Responsibility.

- _ Textile ERP:** there is a legal requirement for brands to contribute to the funding of waste prevention and the management of their products' end-of-service life.

- _ Marketers:** this term covers the brands, companies and manufacturers who sell textile products, footwear or clothing in France.

- _ Member:** this a marketer who declares the quantities placed onto the market then pays the resulting fee to the eco-organisation. 100% of brands, companies and manufacturers placing goods subject to regulations must either manage the end of their products' service life themselves or eco-contribute to Refashion to do it for them.

Why participate in the eco-organisation's work?

Refashion is an eco-organisation at the centre of a global project. It is a hub of exchange making it easier for different stakeholders in the textile industry to contact each other. It is also a lever for establishing synergies between the activities of each stakeholder for a common goal: **encourage eco-design and recover clothing and footwear waste in order to transform it into new resources.**

⁽¹⁾ The calculation: 2.8 billion items / 525,600 minutes in the year.

Eco-design led by Refashion

Following the successful experiments in the eco-design workshops at the end of 2020, Refashion held the “Rendez-vous de l'éco-conception” eco-design event in 2021. There were 9 workshops in one event, bringing together a wide audience, mainly comprising brands but also designers, students, consulting firms and actors in second-hand entities in the textile industry. An event designed for beginners in mind or the most experience players in order to rise to the eco-design challenge.

The 9 eco-design events in 2021

- 14.01.2021**
Awareness-raising webinar
Sustainable procurement of materials⁽¹⁾
Speaker: Marie-Emmanuelle Demoures, BALZAC PARIS
- 11.02.2021**
Support Workshop
Eco-design footwear
Speaker: Gauthier Bedek, Groupe ERAM
- 30.03.2021**
Awareness-raising webinar
Funding in order to begin eco-designing⁽¹⁾
Speaker: Erwan Autret, ADEME
- 20.04.2021**
Support Workshop
Eco-designing lingerie
Speaker: Marie Rochas & Dominique Berson, CHANTELE
- 14.09.2021**
Awareness-raising webinar
Integrating recycled materials into products⁽¹⁾
Round table: Christèle Merter, LA GENTLE FACTORY, Mara Poggio, CETI, Shuang Zhang, IDKIDS, Marie Buttet
- 17.06.2021**
Support workshop
Better design by working together
Speaker: Solène Naeye, LE SLIP FRANÇAIS, & David Leromain, 1083
- 25.05.2021**
Awareness-raising webinar
Eco-design for all⁽¹⁾
Speaker: Clara Barry, Eco-design Life Cycle Performance Division
- 02.12.2021**
Awareness-raising webinar
The tools to calculate a product's environmental impact⁽¹⁾
Speaker: Samuel Mayer, Eco-design Life Cycle Performance Division
- 09.11.2021**
Support workshop
Prolonging a product's service life
Speaker: Alice Bardet, PETIT BATEAU

(1) All webinars are available in replay on the refashion.fr website

Two types of event formats: why and for who?

Awareness-raising webinars These are for everyone, but more particularly for beginners in eco-design. Their purpose is to provide information and to acclimatise to the general eco-design themes. Rolled out in digital format, there were, on average, more than 100 participants sharing best practices at each of the 5, one hour-long awareness-raising sessions programmed in 2021. Moderated by Refashion, these workshops were boosted by “outside” speakers who talked about their experience in the field. Their purpose was to enable others throughout the textile industry to benefit from both the levers of success and the obstacles encountered by those already engaged in the process. **Best practice is within everyone's reach.**

Workshops providing support in eco-design Exclusively reserved for Refashion member brands, these workshops are collaborative and participative with around twenty participants maximum per session. A limited number of participants had been defined in order to optimise learning and discussion amongst peers. These workshops, totalling 4 in 2021, were a huge success and brought together as many varied worlds and themes such as footwear, lingerie and sustainability.

To be continued in 2022 ...

- This eco-design event will continue in 2022 with the following tasks:
- ✓ Set up meetings and networking between peers
 - ✓ Develop programmes that provide support through several workshops in order to study complex problems in depth

The successful deployment of eco-design events

9 workshops in 2021

On average, 92% of participants said that they were “satisfied” or “quite satisfied” with the workshops⁽¹⁾.

“These workshops are run by experienced guests and enable participants to gain sound knowledge in eco-design”. They are also forums for essential discussions between the different stakeholders in the textile industry.”

Briac DELAUNE, Mission Officer, CSR, agnès b.

(1) After each session, the participants were given a satisfaction survey questionnaire to complete.

The “Eco design” platform has a make-over

Launched in September 2020, with aim of becoming a reference technical base on eco-design for clothing and footwear, new features were added to the Eco design platform in 2021.

The English version is now available. The platform can thereby be used by the entire textile industry, particularly by suppliers or procurement offices located overseas.

Testimonies by the seven new brands such as Salomon, Asphalté or the Maison de la Maille can be found in the “They did it” section. Find out about their eco-design successes in these articles as well as the obstacles encountered. These companies talk about their work to move the entire sector forward.

All of this can be found on the Eco design platform: refashion.fr/eco-design/fr



The French AGECE Law (Anti-waste and Circular Economy Law)

Refashion deciphers the new regulatory obligations

Enacted in February 2020, the French Anti-waste and Circular Economy Law (AGECE) is gradually being implemented with the publication of implementing decrees. The eco-organisation helps its members to understand its repercussions on their organisations.

3

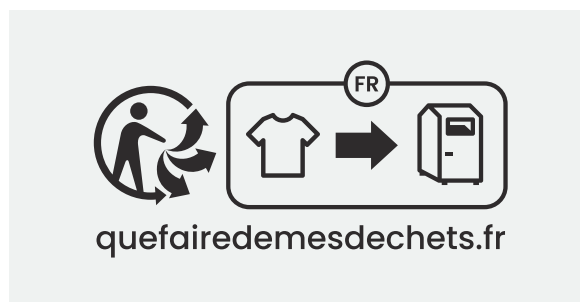
webinars were organised by Refashion on the AGECE law, in collaboration with the Alliance du Commerce and textile industry partners:



- 29.04 2021 **“Agec Law: where are we now?”**

- 04.06 2021 **“Focus on the AGECE law: ban on the disposal of unsold products”**

- 07.09 2021 **“Focus on the AGECE law : deploying the “TRIMAN” and “info-tri” symbols”**



The textile industry TRIMAN and “info-tri” symbols

In June 2021, the decree on the scope of application regarding the affixing of the TRIMAN symbol and “info-tri” symbol onto clothing, household linen and footwear was published.

The eco-organisation is in charge of developing the information given to consumers indicating the sorting methods to follow. **Refashion aims at having a simple symbol**, that does not require translation, that is visible on small sizes so that it can be displayed on the composition label and that can be used horizontally or vertically. Popular with consumers, then validated by public authorities, this symbol must be used by marketers. They will have until 1st of February 2023 to affix it onto their products (and up to 1st August 2023 to sell their products manufactured or imported before 1st February 2023).

The symbols and a guide on their use are available on the website: refashion.fr

Environmental assessment

Works continue

What with trials on environmental labelling in France and the development of a calculation methodology at a European level, works are accelerating to include these issues in core company practice.

In France trials on environmental labelling on clothing and footwear continue

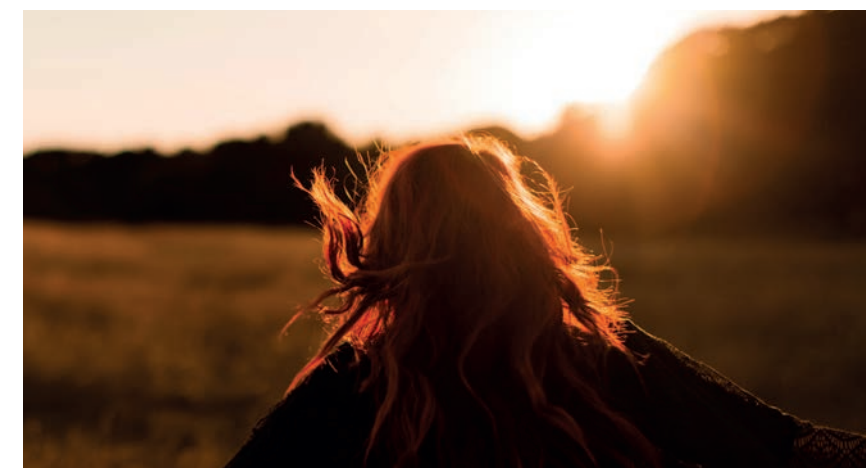
Driven by the French AGECE law, the French trials on clothing and footwear environmental labelling have been extended within the framework of the French Climate and Resilience Law. The textile industry may soon be required to show the environmental impact of all products that are introduced into the marketplace.

French companies have undertaken to test the European referential

The drafting of the European PEFCR (Product Environmental Footprint Category Rules) methodology has been ongoing since 2020 and aims at providing the clothing and footwear industry with common rules to calculate the environmental impact of their products. Managed by the European Commission, the works have been undertaken by a technical secretariat with 26 members, including Refashion.

During the summer of 2021, a first draft of the methodology was submitted for public consultation. The members of the eco-organisation were informed of this consultation in order to send their proposals for improving it. In total, nearly 1,000 comments were made in order to optimise the first draft of the method, in particular around the consideration of the impacts generated by microplastics, the impacts on biodiversity or the method for evaluating the durability of products.

The reference will be tested through case studies on real products in order to identify where optimisation can be made and to check its feasibility. As voting members of the technical secretariat for the PEFCR's Apparel and Footwear project, Refashion, the ADEME and the “Federation de la Haute Couture et de la Mode” joined forces to invite French companies to undertake case studies using this European methodology. This is a strong and positive message because nearly 40 French companies applied to undertake around a hundred case studies in total.



The fee-scale Eco-fees and their modulation

Every year marketers must pay the eco-fee corresponding to the volume of products placed onto the market the previous year. Refashion has developed, in addition to the standard fee scale, a eco-modulated scale allowing to financially reward those products that are more sustainable and which include recycled materials. These eco-modulations are precious tools to incite marketers to begin an eco-design process.

1. What is an eco-fee?

This a fee that marketers must pay within the context of the textile EPR procedure. It finances waste prevention and the end-of-service-life of products in the textile industry.

2. How is it calculated?

It is calculated via each marketer's annual declaration based on the quantities of clothing and footwear that were marketed the previous year. The declaration of quantities is completed per predefined product categories, 107 in total for three sectors: clothing, household linen and footwear. For each category there is corresponding average weight. It is re-evaluated every four years. It is on this basis that the four rates are defined: Very small items, Small items, Medium-sized items, Large items that correspond to four weight brackets. For each weight bracket, a rate is recalculated every year. The fee scale work is carried out by the Fee Scale Committee, the meetings of which Refashion organises several times a year. The final fee scale and its rates are approved by the Board of Directors.

For more information: refashion.fr

3. What is eco-modulation?

To transform the textile industry marketers need to be incited to offer products that are more sustainable and that can be more easily recycled. So, in 2012 Refashion eco-modulated the scale in order to promote eco-design initiatives in three main areas: sustainability, the integration of recycled post-consumer CHF materials and the introduction of recycled CHF materials from post-production off-cuts. Every year the Refashion working groups review the eco-modulation criteria, adding new ones, and revise the tests, thresholds and methods for providing evidence in order to ensure they remain ambitious for the sector.

4. What changes were made in 2021?

For EM1 (Sustainability Eco-modulation) for clothing, the underwear categories are now eligible for a 50% reduction in the standard fee scale. This increases the number of eligible items of clothing in the Sustainable Eco-modulation to 68%.

The scale for items placed onto the market in 2021 (declared in 2022)

Latest news



_ Unique identification number (UIN)

As from 1st of January 2022, all marketers must obtain a unique identification number (UIN). This number is attributed by the ADEME upon request by the eco-organisation. It proves that the marketer is in compliance with its EPR obligations. The number is valid for 1 year and must be renewed each year.

_ The revision of average weights in the clothing, footwear and household linen categories

Every four years, a study on the average weight of products in the textile industry is undertaken by the eco-organisation. This study was undertaken in 2021 and the change in average weight resulted in the reclassification of several products. The scale was consequently readjusted⁽¹⁾.

_ Scrapping of the flat-rate declaration

The French AGEC Law requires that the quantities placed onto the market are sent in detail to the ADEME in order that the public authorities can have reliable data on all EPR sectors. As from 2021, within this new legislative framework all declarations must show the real quantities placed onto the market regardless of sales volumes.

A minimum flat rate contribution has been implemented in order to cover the declaration processing costs and various other related expenses.

(1) You can find the scale for items placed onto the market in 2021 on page 22.

Appendices

Items placed onto the market in figures

Clothing and footwear placed onto the market

Billions of items placed onto the market in 2021 **2.8**

In 2020 **2.4**

Following the crisis in 2020, the levels of items introduced onto the 2021 marketplace have nearly returned to 2019 levels (i.e. 2.9 billion items).

Tonnes of items placed onto the market in 2021 **715,290**

In 2020 **624,187**

The revision of weights in 2021 showed that some product categories had associated average weights well below the product's real weight. Thereby, the total 2020 tonnage was re-evaluated at 624 KT (compared to 517 KT before the re-evaluation).

Average weight (in grams) per item in 2021 **256**

In 2020 **255**

As a result of the revision of the average weight per sub-category in 2021, the average weight of an item was re-evaluated at 255 g for 2020 (220 g before the re-evaluation).

Kilos per inhabitant in 2021 **10.5**

In 2020 **9.3**

As a result of the revision of the average weight per sub-category in 2021, the consumption per inhabitant was re-evaluated at 9.3 kg for 2020 (7.7 kg/inhabitant before re-evaluation).

REFASHION

Breakdown of items placed onto the market in 2021



Clothing represents 80% of the number of items placed onto the market but only 61% of tonnages sold. Indeed, the average weights in the footwear and household linen sectors are higher than that of clothing. It is necessary to consider the two units (number of items and tonnages) when analysing the sector. Indeed, the number of items is the usual unit of measure for placing goods onto the marketplace, whereas collection, sorting and recovery are evaluated in tonnes.

The breakdown of the fee scale per subcategory



- VSI and SI clothing account for 60 % of the total number of items placed onto the market whereas they account for only 28% of the tonnage.
 - As for medium-sized footwear, this accounts for 3.3% of the number of items placed onto the marketplace, compared to 9.2% of tonnages.

VSI: Very small item • SI: Small item • MI: Medium-sized item • LI: Large items

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Fee scale and eco-modulation values for items placed onto the market in 2021

Clothing				
Scale in € excl. VAT/item	VSI	SI	MI	LI
2021 Fee scale	0.002	0.009	0.02	0.063
EM1	0.001	0.0045	0.01	0.0315
EM2	0.001	0.0045	0.01	0.0315
EM3	0.0015	0.00675	0.015	0.04725

Household linen				
Scale in € excl. VAT/item	VSI	SI	MI	LI
2021 Fee scale	0.003	0.01	0.03	0.071
EM1	0.0015	0.005	0.015	0.0315
EM2	0.0015	0.005	0.015	0.0315
EM3	0.00225	0.0075	0.0225	0.05325

Footwear				
Scale in € excl. VAT/item	VSI	SI	MI	LI
2021 Fee scale	0.005	0.014	0.031	0.063
EM1	0.0025	0.007	0.0155	0.0315
EM2	0.0025	0.007	0.0155	0.0315
EM3	0.00375	0.0105	0.02325	0.04725

For items placed onto the market in 2021, the rates have been reviewed in order to take into account the increase in Refashion's funding and budget. These also include the revision of the average weights undertaken in 2021.

The average rate for the 12 categories is 1.16 centimes per item.

Member declaration audits

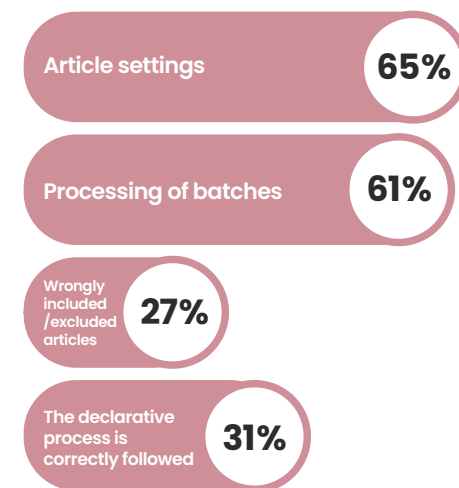
Traceability of streams and the reliability of data are at the heart of Refashions concerns. The new audit campaign in 2021 reveals that more than half (61%) of audits result in the reprocessing of the quantities declared and consequently the fees received.

2021 Audit campaign

	2021
Number of members audited	26
In volume of items placed onto the market (millions)	255
Percentage of items placed onto the market	11%
Number of audits per site	0 ⁽¹⁾
Number of audits on items	26

(1) Due to health restrictions.

Type of anomalies observed



Scale modulation: **None**

Items placed onto the market in 2021 benefiting from eco-modulation

Overall view

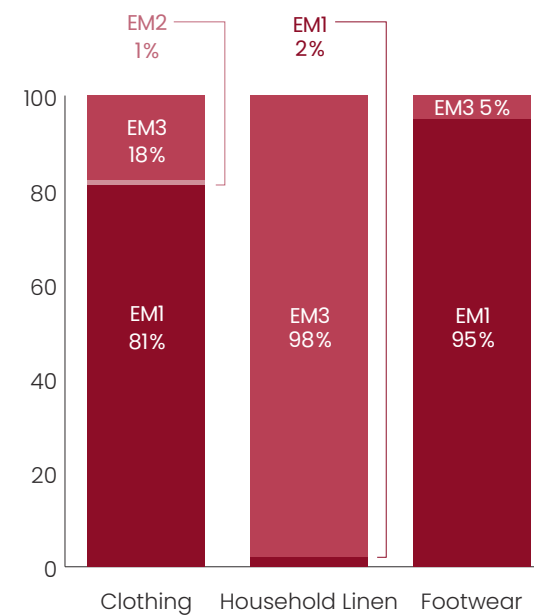
It can be seen that 49 million items placed onto the market benefit from eco-modulation, i.e. an increase of 180% compared to 2020.



Breakdown of eco-modulation in 2021

Looking in detail, 81% of items declared as being eco-modulated concern Eco-modulation 1 which rewards a product's sustainability and 18% concerning Eco-modulation 3 which rewards the integration of materials from production waste.

Per sector



EM1 : Eco-modulation 1 • EM2 : Eco-modulation 2 • EM3 : Eco-modulation 3

EM1 objective: to encourage durability

Scale applicable to certain product categories, criteria and thresholds defined by the product sub-group.

EM2 objective: to encourage the use of fibres and/or recycled materials from used clothing, household linen and footwear.

Criterion retained for eligibility: the product must contain at least 15% recycled fibres/materials.

EM3 objective: to encourage the use of recycled fibres/materials from used clothing, household linen and footwear production waste.

Eligibility criterion retained: the product must contain a proportion equal to or higher than 30% of fibres/materials coming from textile production waste.

The details on eco-modulation values are available on the refashion.fr/pro website.

Re_ design consumption



Re_design consumption

Consumption is the second cornerstone of the circular economy. **Refashion provides information and raises public awareness** through local initiatives with local authorities and all entities having collection points and through national communication initiatives. The messages to be shared and which require action focus on: correct sorting, broader collection solutions, and more generally reuse, repair, recycling and reduction. This involves helping the public, through education and the prevention of waste, to become aware of the environmental stakes and challenges and incite them to act. **Refashion must lead, even accelerate, behavioural changes in order to reduce the environmental impacts caused by the way we consume.**



The digital #RRRR campaign

Initiated in 2019, the #RRR movement grew bigger in 2021 and an additional R was added, standing for Reduction. The campaign then became: **Let's Reuse, Let's Repair, Let's Recycle and Let's Reduce our environmental impact. An innovative national tool essentially on the social networks.**

A committed textile industry

As there is no more time to lose and it is now urgent to take action, Refashion wanted to rally the maximum amount of stakeholders in order to prevent and reduce clothing textile and footwear waste. **From the 8 to 17 October 2021, 150 partners joined in the #RRRR campaign, who, with a united voice, entered the**

Let's Reuse, Repair, Recycle and Reduce movement. On the social networks, on the websites of brands and traders, on the second-hand platforms, in stores, and even at a local authority level, everyone played an important role in encouraging as many people as possible to adopt the reflex that a product can have a second lease of life.

A large community to engage in action

The partners signing the "Commitment Charter" (the clothing, footwear and household linen brands, those in the second-hand sector - the solidarity retail shops, the resale platforms for private individuals - and those in the repair activities, sorting, recycling operators and local authorities) had the possibility of using either a ready-to-use campaign kit, or of adapting the visuals according to their brand identity, whilst keeping the strength and united tone of the messages portrayed.

Results on the increase

37 million views in 2021

55 % of the population covered

by the #RRRR campaign (compared to 31% in 2020 and 27% in 2019)

The OpinionWay Study

Refashion commissioned OpinionWay to understand consumer behaviour and expectations in terms of knowledge, motivation and perception of the second lease of life given to their clothing and footwear. The results speak for themselves: 80% of those surveyed declared that they are concerned about the environment and that this influences their behaviour.

Find a summary of the study at refashion.fr/pro

Long live #shiny and brand-old!

This year, Refashion teamed up with the Anti_Fashion Project community in order to undertake a #RRRR pre-campaign teaser under the creative and offbeat eye of fashion personalities. Mademoiselle Agnès, Katell Pouliquen, Maroussia Rebecq and Amah Ayivi took part in the game with community's young talents. Together they created "shiny and brand-old" looks using items from the Le Relais sorting centres and second-hand clothes shops. **The aim? To demonstrate that used clothing can be given a new lease of life.** And the result is... dazzling!

Initiatives by local authorities

In 2021, 34 local authorities, representing 11 million people, chose to join the #RRRR movement and extend it by organising local events around waste prevention and recovery of clothing. Many awareness-raising initiatives were established throughout France. Amongst them, collection events, wardrobe de-clutter sales, school challenges and competitions and upcycling fashion shows.

Local authorities are taking part in #RRRR

A few noteworthy awareness-raising initiatives on 2021:

#RRRR The Aix-Marseille-Provence metropole organised fashion shows with associations in its area.

#RRRR The public cooperative (syndicat mixte) Bil Ta Garbi organised events in its local shopping arcades and sales areas in partnership with brand names (Decathlon, Ikea, Carrefour, Super U...). There were a dozen or so stands with guest speakers to raise the public's awareness in reducing, reusing, repairing and sorting textiles.

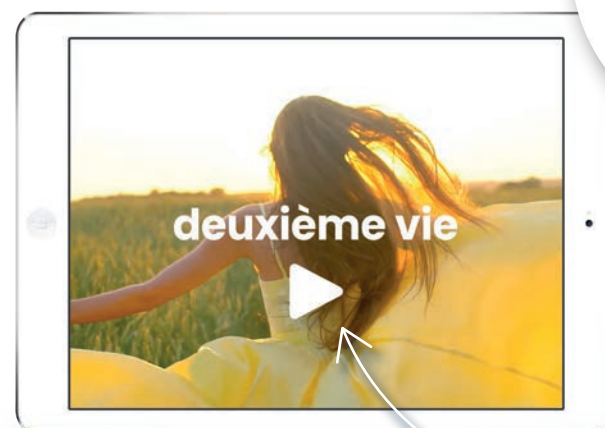
#RRRR The SIPOM de Revel organised a poster competition for primary school children on the theme of clothing (purchasing and selling second-hand items, giving away, mending, etc.). This aim of this event was to raise the children's awareness on the industry's environmental impacts. Later on, local textile collection operations were organised in the different town halls.

#RRRR The SMICTOM Zone Sous-Vosgienne organised a fair where all sorts objects are free (called a gratifieria) in particular clothing, thereby allowing the public to participate in the movement.

#RRRR The Community of Municipalities Creuse Confluence, in partnership with the second-hand shop, La Dynamo de Chambon-sur-Voueize, organised a zero waste sewing workshop. This event allowed fun ideas on reusing household textiles to be shared.

#RRRR Grenoble-Alpes Métropole, in partnership with 38 local towns, carried out a large textile collection event in the wake of the #RRRR campaign. Thereby, 84 containers were made available to all residents wishing to dispose of household linen, clothing, underwear, bags and shoes, whether damaged, with holes in, with deformities, or simply not in fashion.

#RRRR The SITOMAP Pithiviers in partnership with second-hand shops ("Les Petites Puces" and "Grande Friperie") made available awareness-raising stands, places for exchanging goods and repair workshops to the public.



The new self-deposit bank symbol (SDB)

In 2021 collection operators affixed the new symbol onto their self-deposit banks, a symbol developed by Refashion, in agreement with the Collection and Sorting Coverage Committee.

The new textile industry's reference logo guarantees the public that their donations are traceable and ensure that, regardless of their condition, they can be recovered (worn again or recycled). Furthermore, the public have the possibility of scanning a QR code affixed on the self-deposit banks connecting them to a video which explains what will happen to their donations.



Refashion encourages local communities to communicate in their areas with new creations

In 2021, the eco-organisation developed a completely new communication kit for local authorities. It thereby provided the authorities with support in the key messages they wished to convey about the second lease of life given to used clothing.

"Your clothes have a future" is a fun campaign developed in several formats: kakemono, flyers, digital media and on social networks. This campaign changes established rules, and promotes the transmission or transformation of clothing. As they are emotionally charged and represent a part of our past, our clothes are precious and we do not dispose of them as we would do standard waste. This communication kit aims at embodying the act of depositing items of clothing, of recognising the emotional value of this resource and to give meaning to what becomes of waste, even prevent waste.

Lucie, Nora, Pascal, Colette... who sort and clear out their cupboards and give away items to Amélie, Anissa, Kamal, Juliette... A concept that can be rolled over forever and that can be performed by everyone.



Vos textiles et vos chaussures ont de l'avenir, donnez-les. Même ceux qui sont usés ou troués!



Déposez vos vêtements, linge de maison et chaussures dans un point d'apport.



Flashez ce code pour plus d'informations sur le devenir de vos dons.

Le bon geste en 2 étapes

1. Rendez-vous sur refashion.fr/citoyens pour trouver le point d'apport le plus proche de chez vous.
2. Déposez vos textiles selon les consignes ci-dessous :



Vos vêtements et votre linge de maison propres et secs dans un sac fermé (30L).



Vos chaussures liées par paire et dans un sac fermé (30L).



Ne pas déposer d'articles humides, ni souillés.



Spotlight on Refashion's voice in 2021

Refashion Day

For the first time ever, the eco-organisation brought together French and European professionals from the textile industry during Refashion Day organised on 5 October 2021. This is a day where conferences and round tables with a wealth of content took place during which two key subjects were addressed to foster an ever more circular economy:

- _ manufacturing, with a focus on eco-design
- _ recovery, in particular recycling

A fabulous first with nearly 800 participants in person at the Cercle d'Aumale, in Paris, or via live streaming (in French and English): brands, collection, sorting and recycling operators, local authority and institutional representatives, consulting firms, competitiveness clusters and researchers. A major gathering of the textile industry.

Refashion wins two prizes

- _ Silver prize in the 2021 "Communication Strategy on Commitment" Grand Prize
- _ 2021 Design Strategies Grand Prize in the visual identity category.

The Annual General Meeting of Associates

On 30 June 2021 Refashion's Annual General Meeting was held and which was honoured by two guest speakers: Agnès Pannier-Runacher, Vice-Minister of Industry and Barbara Pompili, the Minister for Ecological Transition.

The "Recycling" exhibition

Refashion was a partner at the touring exhibition "Recycling, another view of waste", which addresses the sorting of products that are thrown into bins daily. On Monday 27 September 2021 the private preview of this exhibition took place at the MOCA de Montgaillard domain in the Reunion, during a conference on the different EPR (Extended Producer Responsibility) systems. The exhibition then was set up at the Town Hall in Saint Denis, from the 6 October to the 9 December 2021 and then from 9 December to 11 February 2022 at the Rontaunay Professional Lycée (Secondary School) in Saint Denis, France.

Jean Expo

Up to 8 May 2022, the "Jeans, discover jeans from every angle" exhibition, held at the Cité des Sciences et de l'Industrie, in Paris, retraced the history of the most worn garment on the planet. A cult item, this has become a symbol of rebellion and a piece of history. As a partner in this exhibition, Refashion wanted to show what goes on behind the scenes in jean manufacturing and the ways in which to make them more environmentally-friendly.

The Fashion Triathlon

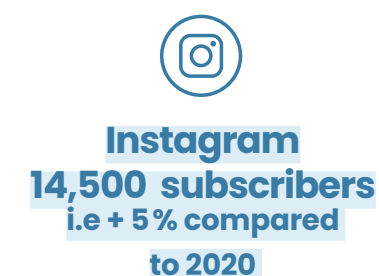
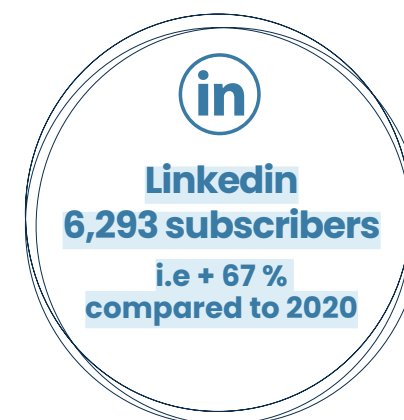
Refashion was a partner in the Ethic Fashion Triathlon, a major competition focusing on the world of fashion, sport, education and recycling. Between 2021 and 2024, several phases have been planned with the climax being the Olympic Games in July 2024. On Monday 8 November 2021, the organisation explained to 400 students its role within the textile industry and its vision about the circular economy thanks to eco-design. Awareness-raising is an essential lever for understanding the importance of a circular economy.

The "Paris Good Fashion" movement

Being a partner in the Paris Good Fashion movement, Refashion undertook to promote more responsible, more environment-friendly fashion by the time the Olympic Games take place in 2024.

The eco-organisation and a digital environment

Through the single digital portal uniting four internet sites (Refashion pro, Refashion citoyen, the "Eco design" platform and Recycle) and via its social networks, Refashion is continuing its aim to provide information and raise awareness in behavioural changes in all its audiences. These are the results of a communication-rich year.

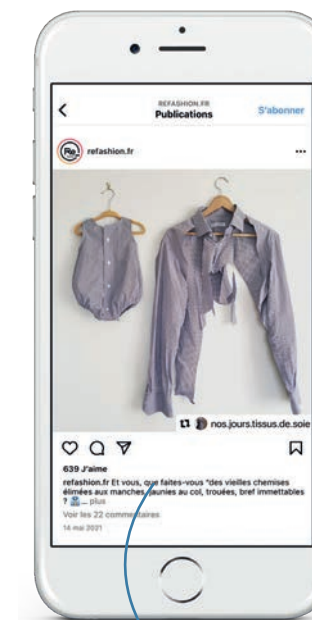


A young audience targeted on Instagram: 50% of subscribers are less than 34 years old



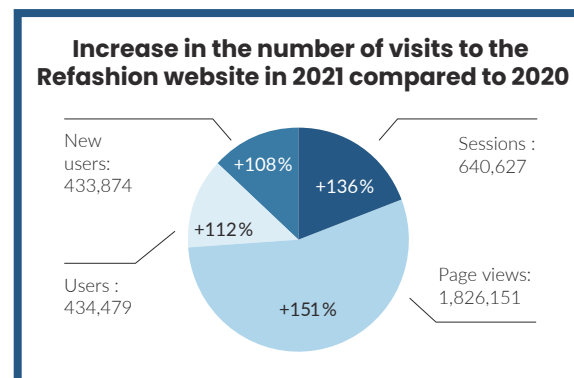
Best FB post:
by the Trois Tricoteurs, one of the Circular Fashion Trophies winners, with 821 likes and 29,000 followers.

facebook.com/refashion.fr/posts/3743438995882082



Best IG post:
An example of reusing an old shirt transformed into a babygrow, with 640 likes and 13,600 followers.

instagram.com/p/CO2XJRnldJ/?utm_medium=copy_link



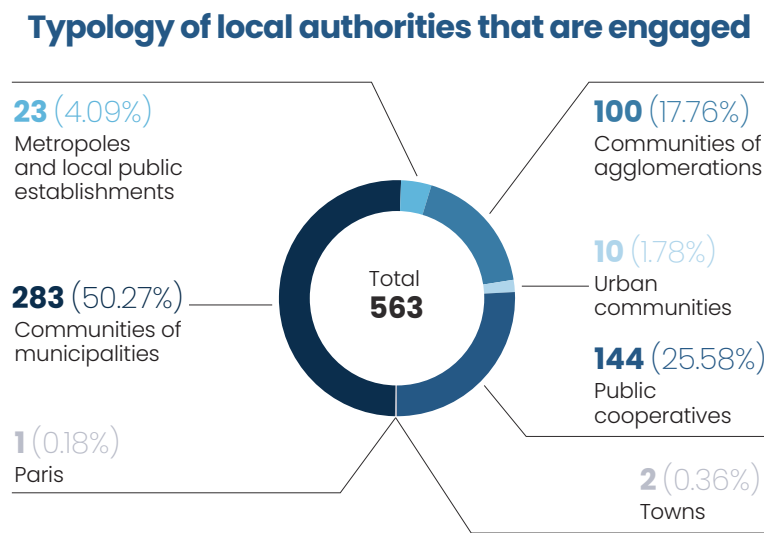
In 2021, Refashion launched its sites in English to make these more accessible for its points of contact and stakeholders.

Appendices

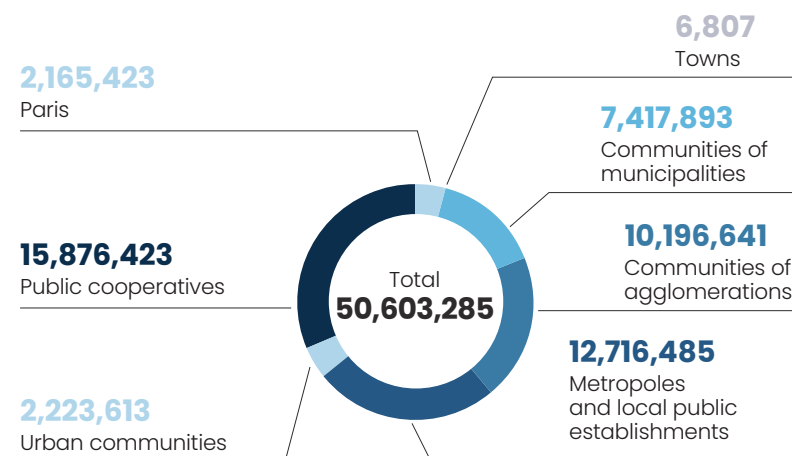
Local authorities and local coverage in figures

Local authorities engaged in the sector in 2021

In 2021, 563 local authorities engaged alongside Refashion to coordinate used textile recovery systems in their areas. Thanks to the agreement they signed with the eco-organisation, 283 local authorities have received support for their communication campaigns undertaken to raise the awareness of their residents.



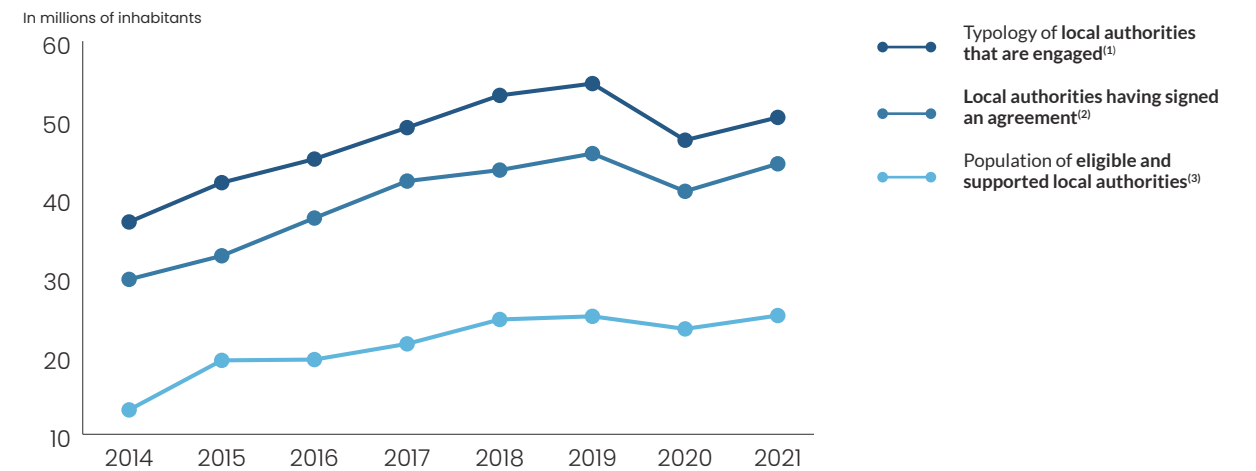
The population covered per typology of engaged local authority



A population of more than 50 million people is covered by local authorities that are engaged in the textile industry.

Development of local authority engagement

(Population concerned in millions)



Of the 563 local authorities that are engaged with Refashion, only 499 signed an agreement in 2021. Amongst these, 283 benefited from funding from Refashion for awareness-raising initiatives for their residents, accounting for 23 million people.

The remaining 216 local authorities having signed an agreement did not contact the eco-organisation.

For a better understanding...

- (1) Engaged local authority:** this is a local authority that is registered with Refashion and has access to the sector's data in its area and communication kits.
- (2) Local authorities under agreement:** this is a local authority that has signed an agreement with Refashion and can thereby benefit, under certain conditions, from funding for communications purposes at a rate of €0.10/inhabitant.
- (3) Supported local authority:** this is a local authority who benefits from support for communications that it undertook in year N-1.

Financial support in €M

The amount of funding in 2021 for communication initiatives in 2020 is €2.5M (compared to €2.3M in 2020 for initiatives carried out in 2019).

Year	2014	2015	2016	2017	2018	2019	2020	2021
Financial support (€M)	1.3	1.9	2.0	2.2	2.3	2.5	2.3	2.5

Collection and sorting in the French regions in 2021

Average number of inhab/SDB ratio: 1,494

Number of self-deposit banks (SDB) in 2021: 44,829

Average collection in kg/inhab/year: 3.6

Of the 19 regions in France, 6 achieved or nearly achieved the collection target of 4.6kg/inhab/year, set by public authority specifications.

- 4.5kg and more collected/inhab
- Between 3.1 and 4.4 kg collected/inhab
- Less than 3 kg collected/inhab

Normandy
COLLECTION IN T: 15,700
RATIO INHAB/SDB: 1,380
RATIO KG/INHAB: 4.7
SORTING IN T: 6,126

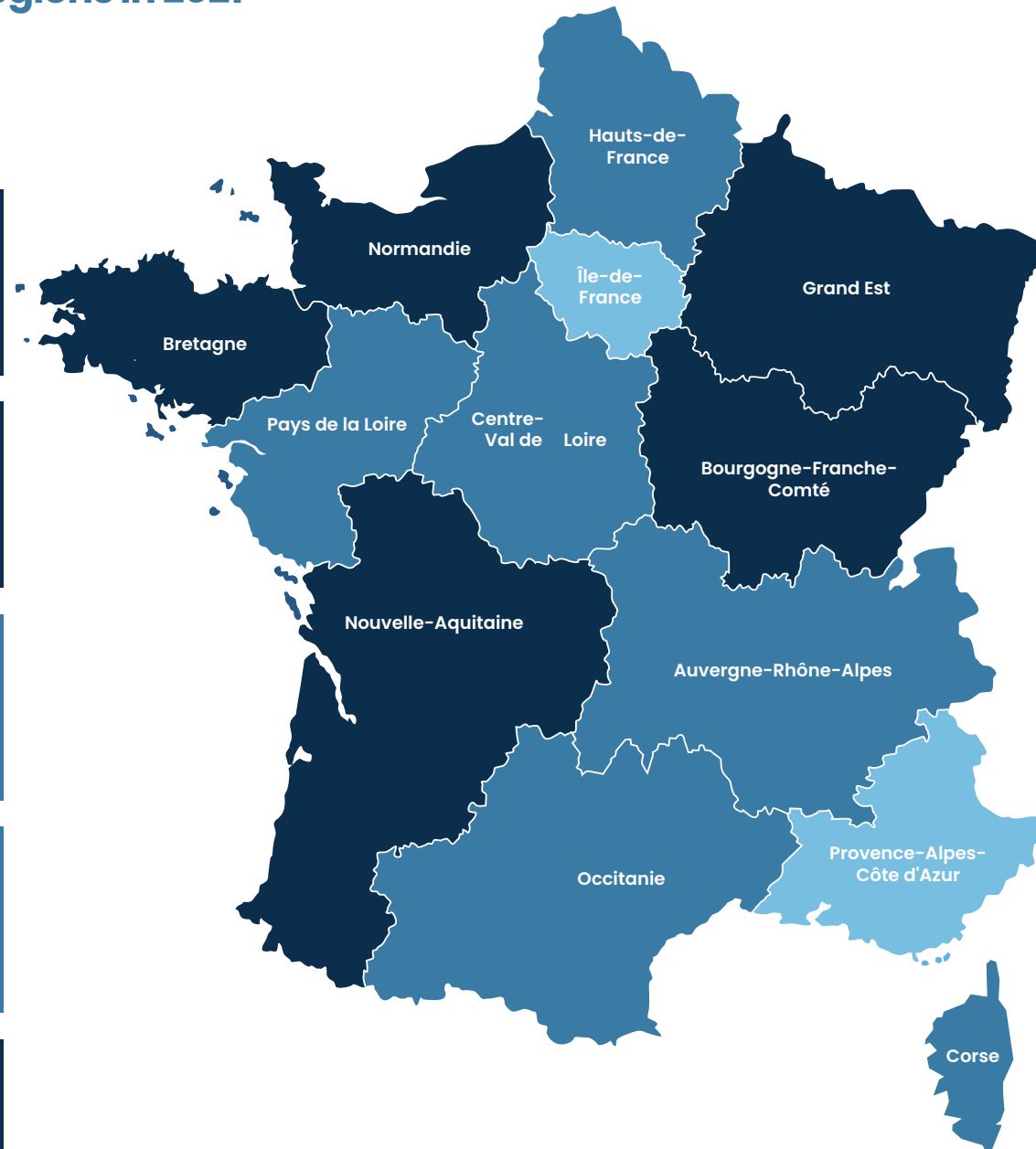
Brittany
COLLECTION IN T: 15,898
RATIO INHAB/SDB: 1,523
RATIO KG/INHAB: 4.7
SORTING IN T: 11,212

Pays de la Loire
COLLECTION IN T: 16,013
RATIO INHAB/SDB: 1,418
RATIO KG/INHAB: 4.2
SORTING IN T: 4,882

Centre-Val de Loire
COLLECTION IN T: 10,557
RATIO INHAB/SDB: 1,386
RATIO KG/INHAB: 4.1
SORTING IN T: 5,630

Nouvelle-Aquitaine
COLLECTION IN T: 26,765
RATIO INHAB/SDB: 1,112
RATIO KG/INHAB: 4.5
SORTING IN T: 12,410

Occitanie
COLLECTION IN T: 21,786
RATIO INHAB/SDB: 1,094
RATIO KG/INHAB: 3.7
SORTING IN T: 13,190



FRENCH OVERSEAS TERRITORIES



Hauts-de-France
COLLECTION IN T: 26,048
RATIO INHAB/SDB: 1,461
RATIO KG/INHAB: 4.3
SORTING IN T: 48,080

Île-de-France
COLLECTION IN T: 24,526
RATIO INHAB/SDB: 2,753
RATIO KG/INHAB: 2
SORTING IN T: 7,499

Grand Est
COLLECTION IN T: 25,189
RATIO INHAB/SDB: 1,031
RATIO KG/INHAB: 4.5
SORTING IN T: 20,624

Bourgogne-Franche-Comté
COLLECTION IN T: 14,130
RATIO INHAB/SDB: 1,274
RATIO KG/INHAB: 5
SORTING IN T: 8,796

Auvergne-Rhône-Alpes
COLLECTION IN T: 31,202
RATIO INHAB/SDB: 1,505
RATIO KG/INHAB: 3.9
SORTING IN T: 11,687

Provence-Alpes-Côte d'Azur
COLLECTION IN T: 13,072
RATIO INHAB/SDB: 1,804
RATIO KG/INHAB: 2.6
SORTING IN T: 8,785

Corse
COLLECTE EN T: 1,185
RATIO HAB/PAV: 1,407
RATIO KG/INHAB: 3.5
SORTING IN T: 0

Guadeloupe
COLLECTION IN T: 0
RATIO INHAB/SDB: 0
RATIO KG/INHAB: 0
SORTING IN T: 0

Mayotte
COLLECTION IN T: 0
RATIO INHAB/SDB: 256,518
RATIO KG/INHAB: 0
SORTING IN T: 0

Saint-Pierre-et-Miquelon
COLLECTION IN T: 31
RATIO INHAB/SDB: 1,494
RATIO KG/INHAB: 5.3
SORTING IN T: 0

Martinique
COLLECTION IN T: 440
RATIO INHAB/SDB: 5,360
RATIO KG/INHAB: 1.2
SORTING IN T: 0

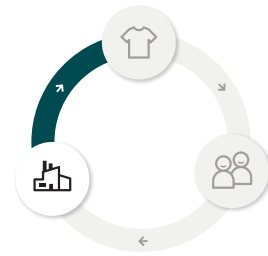
La Réunion
COLLECTION IN T: 1,873
RATIO INHAB/SDB: 4,978
RATIO KG/INHAB: 2.2
SORTING IN T: 0

Guyane
COLLECTION IN T: 33
RATIO INHAB/SDB: 40,240
RATIO KG/INHAB: 0.1
SORTING IN T: 0

Re_ generate materials

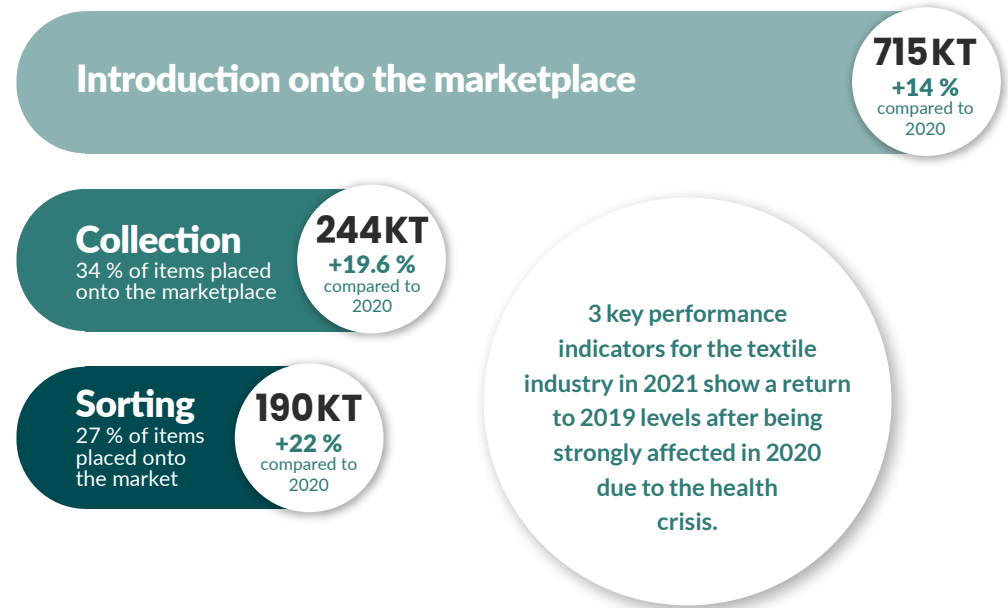


Re_generate materials



In order to accelerate the development of an operational recycling industry, competitive in France and Europe, the eco-organisation supports the textile industry via several **major tools**: working groups on “auto mobile non-woven materials” and “composite materials”, the SMP Committee; the Textile Materials Library; the Innovation Challenge, with a new format this year, and above all, the “Recycle by Refashion” platform enabling industrials to find and integrate materials from used, non-reusable clothing and footwear into their production processes.

REFASHION



Collection The 1st step in the second lease of life given to clothing, footwear and household linen

Collection is an essential stage in regenerating waste. This is one of three textile industry performance indicators, along with sorting and recovery.

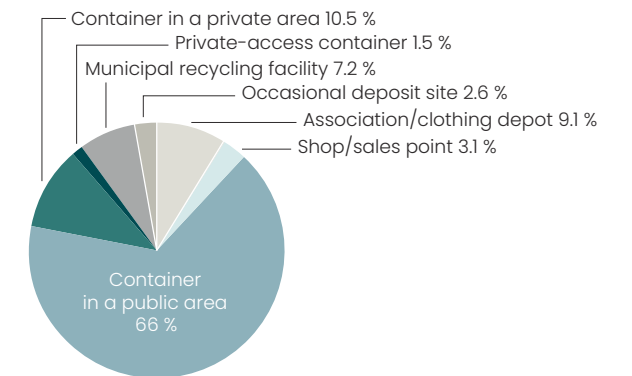
The overall volume of waste collected in 2021 has increased by 40,000 tonnes compared to 2020, the year of the health crisis, and marks the recovery of business in the textile industry. The tonnages of collection activities are very close to those of 2019 (244 kT in 2021 compared to 248 kT in 2019).

Increasing collection remains necessary in order to achieve the target set in the eco-organisation’s authority approval specifications (50 % collected in relation to the tonnages placed onto the market). However, is it a priority to increase collection if the sector does not have industrial recycling solutions for non-reusable textiles at this moment in time? The health crisis demonstrated that as soon as the export markets stopped being operational, collection and sorting mechanically came to a halt. Refashion is convinced that it is necessary to **concentrate its efforts and resources on the industrialisation of used, non-reusable textiles** as a preliminary step to increase collection.

What needs to be retained about 2021:

- **244,448 tonnes collected**, i.e. an average weight of 3.6 kg/inhabitant/year, close to 2019 levels (3.7 kg/inhabitant/year)
- **44,829 owners of self-deposit banks** compared to 44,633 in 2020

Distribution of self-deposit banks (SDB) in France



Containers in a public area remain the vast majority (i.e. 66% of SDB). A certain stability can be seen in the breakdown of SDB types.

There are now 408 owners of self-deposit banks (SDBO) compared to 376 in 2020. A rise of 8.5% in the number of self-deposit banks can be seen, linked to the tightened measures for tracking sorted tonnages. This rise confirms the necessity for SDBO to be identified by Refashion. Those involved in collection operations have various profiles: these can be commercial or private companies or associations. Some companies manage several locations, others only one. Some of those with banks manage a sorting activity in addition to collection activities, others sell the resource collected. The disparity in bank owners provides good national coverage with 1 self-deposit bank per 1,494 inhabitants. Nonetheless some local areas need to be optimised, such as densely populated areas or those with low-density populations.

The average yield of a SDB is 5.4 tonnes/year.

Following 2020, which was strongly affected by the health crisis, 2021 shows the same level of performance as 2019.

FOR A 100% CIRCULAR INDUSTRY

Sorting

The challenge: maximise clothes sorting for reuse and material sorting for recycling purposes

Following collection but before treatment, the sorting stage consists of the essential routing of collected clothing and footwear waste to recover it. Sorting operators separate the reusable clothing and footwear, a priori profitable thanks to their resale as second-hand products. They also sort non-reusable clothing and footwear which will be transformed into new raw materials that are more costly to prepare.

2021, post-health crisis, was marked by several factors: after the decrease in 2020, sorted volumes are nearly as high as those of 2019; financial support has been boosted by the differentiation in the fee scale per type of category sorted; sorting's economic and environmental balance sheet for the 2016-2019 period was established and shared.

What needs to be retained about the business:

66 sorting centres have signed an agreement (compared to 64 in 2020), 51 of which are in France and 15 elsewhere in Europe. This increase is due to 4 new sorting centres that signed an agreement (2 in France and 2 outside of France) and the halting of the processing of CHF from France by 2 sorting centres (one in France, the other in Europe).

190 kT sorted (compared to 156 kT in 2020): i.e. an increase of nearly 22% compared to 2020, but which remains 3% lower compared to the volume sorted in 2019 (196 kT).

Lastly, like every year, the difference in volume between the total collected by those possessing referenced SDB and sorting operators having signed an agreement is high, standing at 54 kT in 2021 (compared to 48 kT in 2020).

There are 3 reasons for this difference in collected and sorted tonnages:

1. Tonnages sent to sorting operators outside of France that have not signed an agreement (between 30 and 40 kT)
2. Tonnages sent directly for reuse by the collector (between 10 and 20 kT)
3. Tonnages sent directly to landfill (between 0 and 5 kT)

Distribution of sorted tonnages per category of operator (France and Europe)

	N° of sorting centres	Sorted tonnages	% of total sorted
Le Relais	18	94,645	50 %
Independent operators	15	26,588	14 %
Emmaüs platforms	8	20,464	11 %
Association platforms	10	17,225	9 %
Operators outside of France	15	31,626	16 %
Total	66	190,548	100 %

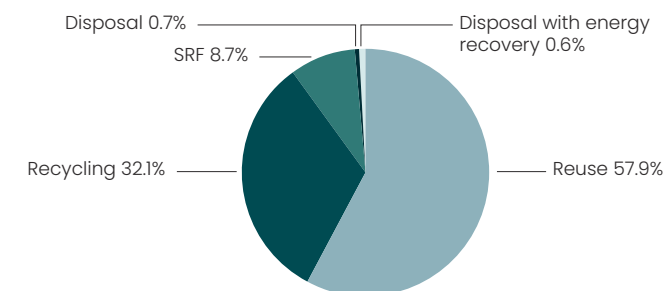
The relative market share in sorted volume per category of stakeholder is stable from one year to the next, in particular the sorting centres outside of France which account for 16% of the total sorted.

A rise in funding for sorting

In consultation with the sorting operator representatives, additional temporary funding was introduced in 2020 for tonnages intended for recycling and SRF (Solid recovered fuel). This measure enabled a sum of between €105 and €136/supported sorted tonne to be paid per centre, depending upon the individual percentages of recycling and SRF. In 2021, Refashion conducted a consultation process to strengthen the differentiation of financial support according to the reality of the destination of sorted sources, the results of which were made official by the French ministerial decree of 2 March 2021, as follows:

- _ Reuse: €80/t
- _ Recycling, SRF: €180/t
- _ Energy recovery: €20/t
- _ Disposal: €0/t

The breakdown per category of sorting carried out in the 66 centres in France and outside France:



Reuse, still remains the highest, i.e. the share of clothing and footwear intended for resale on the second-hand market in France and for export. This is on the rise standing at 57.9% in 2020, an effect of the health crisis) and is at 2019 levels (57.8%).

Recycling accounts for 32.1% (compared to 33.3% in 2020 and 33.5% in 2019), a decrease in the relative share for the last two years. Sorting of materials for garneting account for 23.1% and remains stable compared to 2019 whilst production of rags to be shredded at 9% is lower compared to 2019 (10%).

The SRF (solid recovered fuel) production process (shredding and densification of an alternative fuel for cement kilns) was lower at 8.7% (compared to 9.1% in 2020) and on the rise compared to 2019 (7.9%).

Disposal (with or without energy recovery) is around 1.3% i.e. 0.2 points higher compared to 2020 and 2019, which corresponds to 2,500 tonnes. Also note that only 0.7% of sorted textiles are disposed of without energy recovery.

These overall results mask very different percentage breakdowns per sorting centre.

Indeed, the reuse rate covering premium choice reuse, recycling and SRF, as well as the different ways of disposal all show very high differences related to a sorting centre's capacity.

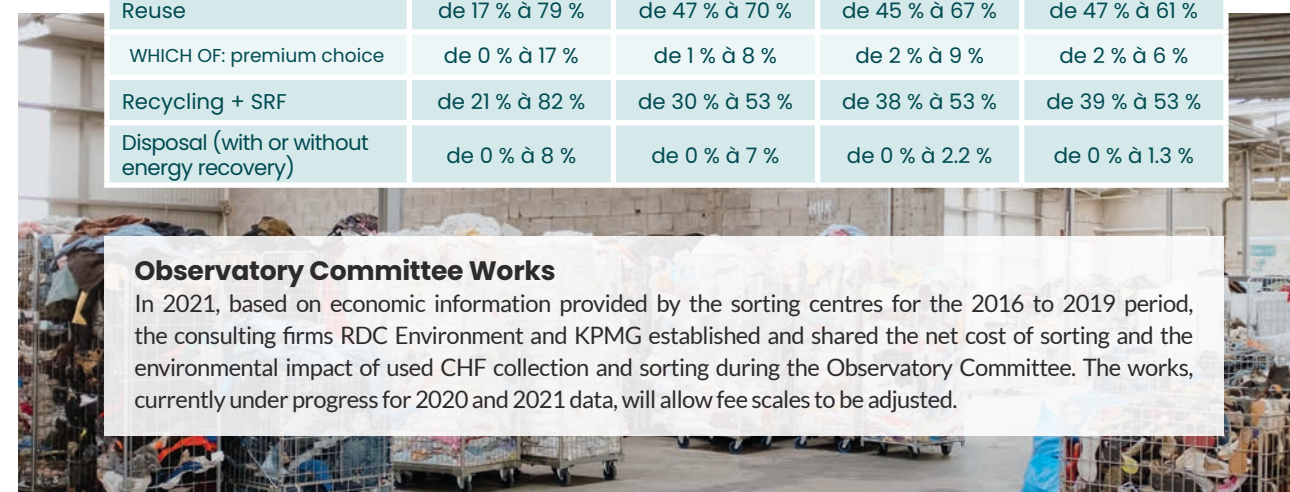
It should be noted that the higher the sorting capacity, the lower the differences become, but they still remain very high, as shown in the following table:

Relative share of the main sorting outlets for 4 sorting capacity categories each representing 25% of the total sorted tonnage in 2021:

Annual sorting capacity	Less than 2,500 tonnes	Between 2,500 & 3,999 tonnes	Between 4,000 & 5,999 tonnes	More than 6,000 tonnes
Number of sorting centres concerned	37	14	10	5
Reuse	de 17 % à 79 %	de 47 % à 70 %	de 45 % à 67 %	de 47 % à 61 %
WHICH OF: premium choice	de 0 % à 17 %	de 1 % à 8 %	de 2 % à 9 %	de 2 % à 6 %
Recycling + SRF	de 21 % à 82 %	de 30 % à 53 %	de 38 % à 53 %	de 39 % à 53 %
Disposal (with or without energy recovery)	de 0 % à 8 %	de 0 % à 7 %	de 0 % à 2.2 %	de 0 % à 1.3 %

Observatory Committee Works

In 2021, based on economic information provided by the sorting centres for the 2016 to 2019 period, the consulting firms RDC Environment and KPMG established and shared the net cost of sorting and the environmental impact of used CHF collection and sorting during the Observatory Committee. The works, currently under progress for 2020 and 2021 data, will allow fee scales to be adjusted.



Reuse

The first choice for used clothing and footwear

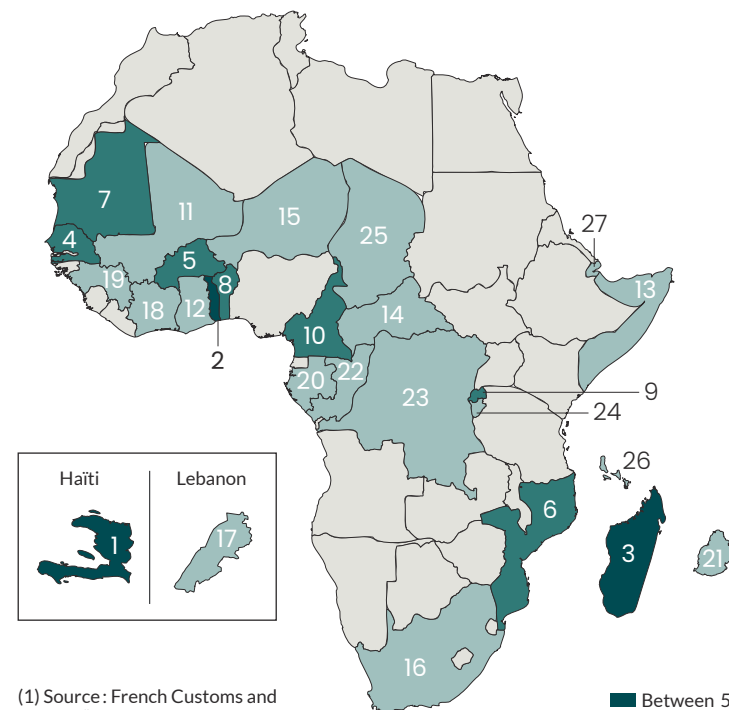
The majority of clothing collected and sorted is destined for reuse: it is resold on the second-hand clothing market, be this charity shops or second-hand clothes shops, in France or abroad. In regards to the ranking of waste treatment methods, reuse should be the prime choice due to its low environmental footprint.

In 2021, reuse accounts for 57.9% of tonnages sorted by operators having signed an agreement, a percentage close to that of 2019 (before the health crisis). Nevertheless, the trend for reuse is declining (64% in 2014 compared to 57.9% in 2021). Indeed, over the last few years major changes in the textile industry have been seen: the placing of products onto the market that do not last as long; the development of many solutions to resell/exchange/return items aimed at consumers and, lastly, the increase in the tonnages collected. The combination of these three tendencies means that a greater amount of clothing, footwear and household linen collected is in a state of wear and tear that does not allow them to be reused. This means that a new recovery equilibrium model must be found that will integrate more recycling in the years to come.

Focus on what becomes of clothing sorted for reuse

Africa is the number one recipient continent for the direct export of reusable clothing and footwear collected in France (excl. Haïti). In 2021 the total tonnage is 60,000 tonnes, i.e. 37% of the total exports under the French Customs and Excise code ("second-hand clothes").

Recipient countries (1)



(1) Source: French Customs and Excise / "second-hand clothes" code.

■ Between 5,000 to 12,000 tonnes ■ Between 1,000 to 4,999 tonnes ■ Between 50 to 999 tonnes

Recipient countries (1)	In tonnes
1 Haïti	11 090
2 Togo	7 155
3 Madagascar	5 480
4 Senegal	4 166
5 Burkina-Faso	4 136
6 Mozambique	2 465
7 Mauritania	2 096
8 Benin	1 669
9 Rwanda	1 379
10 Cameroon	1 280
11 Mali	538
12 Ghana	510
13 Somalia	424
14 Republic of Central-Africa	363
15 Niger	359
16 South Africa	351
17 Lebanon	333
18 Ivory Coast	329
19 Guinea	317
20 Gabon	232
21 Mauritius Island	204
22 Republic of the Congo	198
23 Democratic Republic of the Congo	160
24 Burundi	153
25 Chad	148
26 Comoros	121
27 Djibouti	52

Recycling

Towards a 100% circular industry

The acceleration in industrialising the recycling of non-reusable clothing and footwear is a major stake for future years. Refashion funds innovative projects and supports stakeholders who are striving for a 100% textile industry in France and in Europe.

Recycling, what exactly is this?

The recycling process consists in transforming non-reusable clothing and footwear into new resources (rags, geotextiles, fibres, non-woven materials, composite plastics etc.). Consequently it provides multiple 'closed-loop' outlets - applied to the textile industry-, but also and above all 'open-loop' outlets, for example in the construction, automobile and plastics manufacturing industries. It provides an opportunity to use materials that are already available thereby saving natural resources.

To accelerate the development of industrial recycling solutions, the eco-organisation is continuing to support the textile industry through several major tools:

- _ "Non-woven" and "composite" working groups
- _ The SMP Committee
- _ The Recycle by Refashion platform
- _ The Textile Materials Library
- _ The Innovation x SoScience Challenge

The "Non-woven" and "Composite" working groups

Since 2020, Refashion funds two working groups on two priority segments: non-woven textiles for the automobile industry and composites. Managed by experts, these groups have established processes for sorting and material preparation trials.

Non-woven automobile textiles

The working group, created in 2019, has developed three, high acoustic performance non-woven felt samples that can be used in different parts of a vehicle. These three products were the subject of specifications for the trials undertaken for the Sorting and Materials Preparation Committee (SMP) in 2022.

Composites

The Composites working group created composite prototypes for the sports and leisure industry. Despite the successful trials on the different manufacturing processes, no transformation operator is willing to establish the specifications at the present time.

The SMP Committee (1)

Made up of referenced stakeholders on the Recycle by Refashion platform, the purpose of this committee is to improve the sorting and the preparation of materials in view of the industrial recycling of non-reusable textiles and footwear into new high-performance materials. To do this, it is necessary to bulk the source.

Specifications are given to sorting operators and material preparation companies by material transformation companies.

Sorting and material preparation trials will take place throughout 2022.

(1) SMP: Sorting and Material preparation



New

Launch of RECYCLE by Refashion The first European digital platform for connecting stakeholders in the clothing and footwear industry

Within the framework of its mission to accelerate clothing and footwear recycling, Refashion is innovating with its "Recycle" platform which provides a response to a major challenge: build bridges to connect companies offering materials with industrials who will integrate them into their production processes.

For who, why? "An inter-industrial vocation"

Mainly aimed at sorting and material transformation companies, the digital Recycle by Refashion platform is not only intended for "closed-loop" stakeholders in the textile industry but also for "open-loop" industries: plastics manufacturing, construction, automobile. This is the particularity of this unique, European level tool.

"Recycling waste on an industrial scale in the textile industry is only possible by opening up opportunities to other industries other than the textile industry"

Alain Claudot,
(Refashion CEO 2009 - 2021)

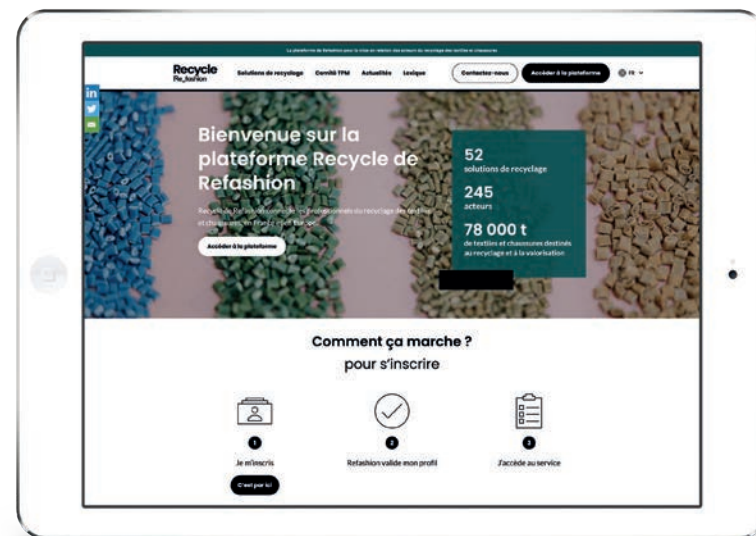
The origins of the project

Refashion established a 30-strong group of European experts coming from various industrial sectors in France, the Netherlands, Germany, Italy, Belgium and Spain in order to define, in French and English, the sorting filters, the content, the recycling solution definitions and the user pathways.

Refashion partnered with the company Inex Circular, specialist in digital relations between stakeholders in the energy and waste recycling sectors. Their robust technology has already been validated by market leaders in France and Europe.

The platform in figures

Recycle by Refashion already counts 245 stakeholders, 75 % of which are French and 25 % European. Amongst these, 40 % are clothing materials and footwear suppliers, and 60 % transformation companies offering semi-finished and finished products to the textiles, plastics, transport and construction industries and even the sports industry.



New

The Textile Materials Library How can material characterisation be improved with a view to the industrialisation of recycling?

One of the eco-organisation's flagship missions is to support the development of recovery technologies for used clothing and footwear sorting coming from French household consumption.

The development of sorting and optical textile material recognition technologies has been identified as an essential lever for the development of recycling solutions. These technologies do however require a large database, calibrated using a very wide range of textile materials samples of known composition and certified.

- ✓ 25 categories of material compositions
- ✓ 20 samples per category
- ✓ 409 pieces of textile materials

Indeed, textiles are made of many material compositions (cotton, polyester, wool, etc.). Manual sorting only (feel, labels) does not enable rapid and reliable identification. The recycling is, therefore, faced with a problem in the characterisation of materials.

For this reason, in 2021 Refashion decided to establish a common base by creating a Textile Materials References Library. This is a key element for calibrating and optimising automatic characterisation systems for textiles, which contribute to accelerating the development of textile materials sorting with a view to recycling.

The Textile Materials Library, a user guide

409 samples of textile materials that are representative of the textile market can be found.

The composition of each sample has been certified by two specialised laboratories: Celabo and Intertek.

This library enables textile material recognition technology suppliers to configure and optimise their systems.

In 2021, Refashion played its role of "facilitator" by making available 10 copies of its Textile Materials References Library.

Innovation challenge the 12th edition has a make-over

For the 2021 edition, the Refashion Innovation Challenge was the subject of an exceptional format. In partnership with SoScience, the challenge revealed new and collaborative solutions providing responses to the following: “How can high environmental performance materials be produced from used, non-reusable clothing and footwear which meet the functional and economic needs of the market?”

For this edition, contrary to the 2020 edition, the expected solutions did not have a minimum technological readiness level (TRL), other than preliminary research work.

SoScience, a specialist in collaborative research and responsible innovation programmes, applied its “The Future Of” methodology for this edition in a specific programme called: “The Future Of Textiles & Footwear Recycling”.

The call for applications process and key figures

Open from October to December 2021, the call for international applications was sent out to 310 experts. 110 companies from 25 different countries showed an interest.

The 2021 Innovation Challenge Jury selected 34 applicants to participate in the Partnership Meeting sessions, the highlight of the “The Future Of” programme.

These two half-days, organised in February 2022, brought together 50 participants, encouraging the emergence of 13 collaborative projects.

8 projects were finalised and submitted to the 2021 Innovation Challenge Jury at the beginning of March.

At the end of the selection process, the jury recommended Refashion’s Board of Directors to fund 5 finalist projects for a total of €622,000.

Taking a look at the Innovation Challenge rules

Open to all for solutions established in France or in Europe, the Innovation Challenge has a minimum budget of €500,000 per year and is fee-free for applicants. This call for projects proposals aims at developing innovative and commercial solutions that optimise used, non-reusable textile and footwear recycling from households in France, and at accelerating the development of a more circular industry in synergy with other sectors (construction, automobile, etc.).

Since 2010, the eco-organisation has therefore committed more than 5.6 million Euros to co-finance 60 ambitious projects on the recycling of used, non-reusable clothing and footwear selected by the Innovation Challenge Jury. This collaborative body is composed of twenty experts from Refashion’s Scientific Committee who also supports the eco-organisation in following up the funded projects. Refashion sincerely thanks them for their commitment.



The 5 winning projects in the 2021 Innovation Challenge

1. TISSIUM INDUSTRIE

Founded in 2015, the company Maximum designs and produces furniture made from industrial waste. Already a winner in 2018, Maximum developed a rigid composite material, TISSIUM, entirely made from waste (recycled textile fibres and recycled thermo-hardening binder). In 2022, the company Tissium SAS was created for the development of a 1,300m² industrial demonstrator located at Ivry-sur-Seine, France. The aim is to produce TISSIUM in the form of machinable panels for the furniture and furnishings market. Its partner Gebetex will provide a sustainable source of used, non-reusable household textiles and a sorting process that has been adapted to the project’s requirements.



2. REVIVAL

Located in the Hauts de France region, the company REVIVAL by impact.capital aims at being the first industrial recycling platform for used footwear in France. It has partnered with Bouyer Leroux, a construction components manufacturer, who is looking for recycled materials as an alternative to oil-based materials. The REVIVAL project is creating a demonstrator using EVA (elastomer polymer) resulting from the recycling of trainer soles to be used as underlay for residential parquet (wooden) flooring.

3. MISTERY

The MISTERY (Multispectral Optical Sensors for TEXTiles RecYcling), collaborative project, within the framework of the Institut de Recherche Technologique (IRT) Nanoelec, aims at prototyping the use of multispectral optical sensors for characterising used household textiles. The tests under industrial conditions will be carried out thanks to the support provided by the Boer Group Recycling Solutions at the Gebetex sorting centre. The two other partners in the project are Aalto University which provides its expertise in the use of optical sensors for textile sorting, and Horbia Scientific a specialist in the production of analytical and measuring technologies.

4. GREENCOSE

INDUO is a young Franco-British company specialised in textile innovation. INDUO has developed a chemical recycling process, Greencose, that enables cotton-based textiles to be recycled into a dual-component fibre for the clothing sector. Thanks to Refashion’s funding, the GREENCOSE project is accelerating its development by testing this innovative process on used textiles mainly comprised of cotton. The characterisation of suitable sources will be defined directly at the sorting centres, with the support of Gemtex, ENSAIT and the CETI.

5. AURAreFIL

Recyc’Elit is a young company that has developed a low-carbon, plastic (PET) depolymerisation solution. It is associated with the Techtera Competitiveness Cluster and Grenoble-Alpes Métropole. The AURAreFIL project aims at adjusting the chemical recycling process to transform used, non-reusable polyester textiles (pure and blended) into recycled polyester thread in the Auvergne Rhone-Alpes region. Techtera will coordinate this project aiming at creating a genuine local industry producing high-quality, recycled polyester thread. Grenoble-Alpes Métropole will supply the sorted textiles.

Appendices

Collection, sorting and recovery in figures

SDB	2021	
	Number of SDB	% in n° of SDB
Type		
Association/clothing depot	4,087	9.1%
Boutique/Sales point	1,404	3.1%
Container, of which:	34,951	78%
– Public space	29,587	66%
– Private space	4,682	10.4%
– Not visible private space for the general public	682	1.5%
Municipal Recycling Facility	3,214	7.2%
Occasional deposit point ⁽¹⁾	1,173	2.6%
Total	44,829	100%

(1) Temporary collection at an SDB address.

Self-deposit banks (SDB) in France

Over all, the number of self-deposit banks (SDB) is stable compared to 2020 (44,829 compared to 44,633 in 2020).

The addresses are identified on the Refashion Citoyen website with a map allowing geolocation.

Changes in sorting centre figures in France

France	2019	2020	2021 ⁽¹⁾	2021 vs 2020
Sorted tonnages	159,820	129,263	158,922	23%
Premium choice	5.5 %	5.4 %	5.6 %	0.2 pt
Other choices	45.8 %	45.4 %	45.4 %	0 pt
Footwear	6 %	5.8 %	6.9 %	1.1 pt
Reuse	57.3 %	56.6 %	57.9 %	1.3 pt
Garnetting	23.5 %	23.5 %	22.8 %	-0.7 pt
Rags	9.6 %	8.7 %	8.4 %	-0.3 pt
Recycling	33.1 %	32.2 %	31.2 %	-1 pt
SRF recovery ⁽²⁾	8.8 %	10.3 %	10 %	-0.3 pt
Material recovery and SRF	99.2 %	99.1 %	99.1 %	0 pt
Disposal	0.8 %	0.9 %	0.9 %	–
– With energy	0.3 %	0.45 %	0.4 %	-0.05 pt
– Without energy	0.5 %	0.45 %	0.5 %	0.05 pt
Total	100 %	100 %	100 %	–

(1) Before audit results. (2) Solid recovered fuel.

Export-import streams of used textiles in France

Exports ⁽¹⁾	Second-hand clothes shop	Rags	Total	Imports ⁽¹⁾	Second-hand clothes shop	Rags	Total
Tonnes in 2021	162,900	20,699	183,599	Tonnes in 2021	5,112	14,712	19,824
Tonnes in 2019	162,202	13,892	176,094	Tonnes in 2019	4,370	15,916	20,286
Change	0 %	49 %	4 %	Change	17 %	-8 %	-2 %
Price per tonne 2021	€505	€171	€468	Price per tonne 2021	€2,262	€625	€1,263
Price per tonne 2019	€446	€158	€423	Price per tonne 2019	€1,567	€593	€803
Change	13 %	8 %	11 %	Change	44 %	5 %	57 %

80% of tonnages collected are exported. Data from French Customs and Excise provides an additional indicator for the change in second-hand clothes market (articles sorted and unsorted intended for reuse) and the rags market (sorted and unsorted destined for recycling). The export volumes of items to be recycled ("rags" code) have increased by 49% compared to 2019 whereas the volume to be sorted and sorted for reuse is stable ("second-hand clothes" code). Note the high rise in prices for both categories. In parallel, a significant share of the same items is imported into France, in particular, rags that have been shredded abroad.

Break down of used clothing and footwear exports per recipient country ⁽¹⁾

	2019	2021
Pakistan	12%	17%
Belgium	19%	16%
Tunisia	13%	13%
India	7%	8%
The Netherlands	5%	7%
Haïti	3%	6%
United Arab Emirates	10%	4%
Togo	6%	4%
Germany	2%	4%
Madagascar	4%	3%
Senegal	3%	2%
Burkina Faso	2%	2%
Mozambique	1%	1%
Mauritania	2%	1%
Other African countries	11.5%	12%
Total	100%	100%

(1) French Customs & Excise ("second-hand clothes" and "rags" codes).

In total, the relative shares per continent are:

- _ Africa: 37 %
- _ Europe: 30 %
- _ Asia: 21 %
- _ The Americas: 7 %
- _ Middle East: 5 %

Textiles and footwear key:

- Sorted for reuse and recycling
- To be sorted or sorted for reuse
- Sorted for recycling
- Sorted for reuse

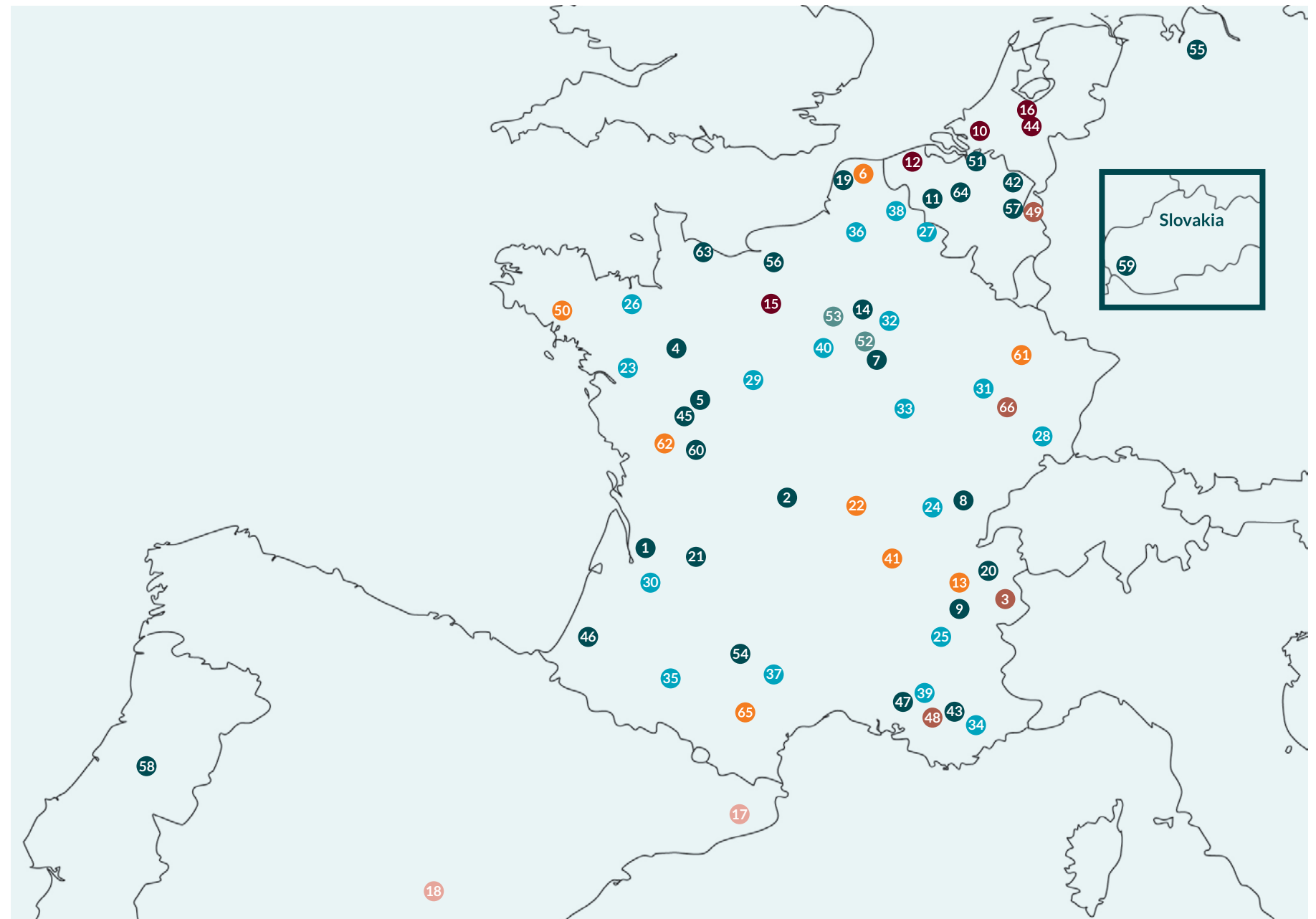
The 66 sorting operators having signed an agreement

- 1. Actifrip**
33240 Saint-André de Cubzac, France
- 2. Agir**
36000 Chateauroux, France
- 3. Alpes Tlc**
73200 Gilly-Sur-Isère, France
- 4. Apivet**
49100 Angers, France
- 5. Audacie**
86100 Châtellerault, France
- 6. Audo-Tri**
62500 Saint-Martin-Lezattinghem, France
- 7. Continental Frip**
94420 Le Plessis-Trévisé, France
- 8. CTFC**
39230 Sellières, France
- 9. Eco Tri International**
38260 La Frette, France
- 10. Euro Used Clothing**
4761 Rk Zevenbergen, Netherlands
- 11. Eurofrip**
9870 Zulte, Belgium
- 12. Evadam NV**
08800 Roeselare, Belgium
- 13. Evira**
38490 Saint-André-le-Gaz, France
- 14. Framimex**
60400 Apilly, France
- 15. Gebetex Tri Normandie**
27200 Vernon, France
- 16. Gebotex**
3316 Bc Dordrecht, Netherlands
- 17. Humana Barcelone**
08480 L'Ametlla del Valles, Spain
- 18. Humana Madrid**
28914 Leganes, Spain
- 19. KFB Solidaire**
62320 Saint-Léonard, France
- 20. La Fibre Savoyarde**
74540 Saint-Félix, France
- 21. La Tresse**
24400 Les Lèches, France
- 22. Le Lien**
58240 Langeron, France
- 23. Le Relais Atlantique**
44220 Couéron, France
- 24. Le Relais Bourgogne**
71380 Saint-Marcel, France
- 25. Le Relais 42**
42410 Pelussin, France
- 26. Le Relais Bretagne**
35690 Acigné, France
- 27. Le Relais Cambresis**
59292 Saint-Hilaire-lez-Cambrai, France
- 28. Le Relais Est**
68270 Wittenheim, France
- 29. Le Relais Eure-et-Loir**
28170 Favières, France
- 30. Le Relais Gironde**
33300 Bordeaux, France
- 31. Le Relais Lorraine**
54170 Allain, France
- 32. Le Relais Nord-Est Ile-de-France**
02200 Ploisy, France
- 33. Le Relais NPDC - R10**
10600 La Chapelle Saint-Luc, France
- 34. Le Relais NPDC - R13**
13014 Marseille, France
- 35. Le Relais Npdc - R65**
65500 Vic-en-Bigorre, France
- 36. Le Relais NPDC - R80**
80830 L'Etoile, France
- 37. Le Relais NPDC - R81**
81660 Bout-du-Pont-de-L'Ar, France
- 38. Le Relais NPDC - Bruay**
62700 Bruay-la-Buissière, France
- 39. Le Relais Provence**
84000 Avignon, France
- 40. Le Relais Val-de-Seine**
78570 Chanteloup-les-Vignes, France
- 41. Le Tri d'Emma**
42300 Villerest, France
- 42. Limbotex**
3990 Peer, Belgium
- 43. Magreg**
13015 Marseille, France
- 44. Marbo Recycling BV**
4782 SM Moerdijk, Netherlands
- 45. Origin**
86280 Saint-Benoit, France
- 46. Ouateco**
40230 Saint-Geours-de-Maremne, France
- 47. Philtex & Recycling**
30128 Garons, France
- 48. Provence TLC**
13127 Vitrolles, France
- 49. Recytex Europe**
4100 Seraing, Belgium
- 50. Retritex**
56308 Pontivy Cedex, France
- 51. Rimatex BVBA**
9100 Sint-Niklaas, Belgium
- 52. Société de distribution de vêtements (95)**
95200 Sarcelles, France
- 53. Société de distribution de vêtements (60)**
60430 Ponchon, France
- 54. Société de récupération de chiffons européens (SRCE)**
81800 Rabastens, France
- 55. Soex Processing Germany GMBH**
06766 Bitterfeld-Wolfen, Germany
- 56. Solidarité Textiles**
76770 Le Houllme, France
- 57. Tertex**
4040 Herstal, Belgium
- 58. Texamira**
6270-554 Seia, Portugal
- 59. Textile House for Euro Trade**
90301 Senec, Slovakia

- 60. Tio Createx Sarl**
86400 Saint-Saviol, France
- 61. Tri d'Union**
57 60 Behren Les Forbach, France
- 62. Trio**
79000 Niort, France
- 63. Tritex Normandie**
14650 Carpiquet, France
- 64. Vanbreuze Productions Sa**
9320 Erembodegem, Belgium
- 65. Vertex**
09300 Lavelanet, France
- 66. Vosges TLC**
88150 Capavenir, France

SORTING CENTRES AFFILIATED TO THE SAME GROUP

- Emmaüs
- Groupe Boer
- Groupe Humana
- Groupe SDV
- Indépendants
- Le Relais
- Synergies TLC



Industry key performance indicators

Since 2009, the eco-organisation carries out precise measurements for the industry's key performance indicators and its changes.

	AUTHORITY APPROVAL 2014-2019	AUTHORITY APPROVAL 2014-2019	AUTHORITY APPROVAL 2020-2022	AUTHORITY APPROVAL 2020-2022
	2014	2019	2020	2021
Member entities (companies and federations)	4,600	4,019	4,096	more than 6,000
Number of membership contracts	1,650	1,519	1,580	4,351
Number of items placed onto the market (billions)	2.5	2.9	2.4	2.8
Corresponding estimated tonnage	600,000	648,000	624,187	715,290
Eco-fee amounts in €M	15.8	25.6	34.5	51.1
Of which % of eco-modulated items	0.03 %	2.09 %	0.70 %	1.60 %
Average contribution per item of CHF	€0.0063	€0.008	€0.0127	€0.0168
Contribution in €/tonne placed onto the market	€26.3	€39.4	€60.00	€71.44

Public awareness-raising on sorting	2014	2019	2020	2021
Number of local authorities registered (including having signed an agreement)	870	679	535	563
Population covered by registered local authorities	37,252,749	54,647,067	47,370,914	50,603,285
Number of local authorities having signed an agreement	522	594	451	499
Number of communication initiatives declared for year N-1	996	960	858	802
Amount of funding for communications awarded for year N-1	€1,310,438	€2,509,041	€2,339,431	€2,512,765

Collection of used CHF	2014	2019	2020	2021 ⁽¹⁾
Tonnage collected	175,000	248,547	204,291	244,448
Quantity collected per inhabitant (in kg)	2.7	3.7	3.1	3.6
Number of self-deposit banks (SDB)	34,650	46,066	44,633	44,829
Tonnage collected per SDB	5.1	5.4	4.5	5.45
Number of towns having at least 1 SDB	–	16,310	16,383	15,689
Population covered by a SDB (number of inhabitants in equipped towns)	54,702,352	58,747,334	58,949,329	56,665,826

(1) Result before audit.

Sorting & destination of sorted materials (France & Europe)	2014	2019	2020	2021 ⁽¹⁾
Number of sorting centres declaring and under agreement / of which in France	60 / 43	63 / 49	64 / 50	66 / 51
Sorted tonnages / of which in France	153 602 / 79 %	196 054 / 81.5 %	156 000 / 82.9 %	190 548 / 83.4 %
Average tonnage per sorting centre	2,560	3,112	2,438	2,887
% recovery of sorted tonnages (including energy recovery)	99.1%	99.5%	99.6%	98.8%
Of which: Reuse	64.1%	57.8%	56.5%	58%
Materials for garnetting	20.2%	23.4%	23.6%	23.1%
Cleaning cloth	9.3%	10.1%	9.7%	9%
Solid recovered fuels (SRF as material recovery)	4.3%	7.6%	9.1%	8.7%
Disposal via incineration with energy recovery	1.2%	0.6%	0.7%	0.6%
Disposal without energy recovery	0.9%	0.5%	0.4%	0.6%
Amount of funding paid for sorting	€10,817,419	€16,018,197	€16,999,640	€23,544,559

Jobs in France	2019	2020	2021 ⁽¹⁾
N° Total FTE⁽²⁾, of which:	2,443	2,409	2,404
FTE in sorting	1,483	1,255	1,427
FTE in inclusive jobs	419	552	619
Relative share in %	28%	44%	43%
Productivity in T/FTE in sorting	108	103	111

(1) Result before audit. (2) FTE: Full-time equivalent.

R&D Studies and projects	2014	2019	2020	2021
Number of R&D projects funded since 2010	18	52	55	60
Amount of cumulated funding engaged in R&D since 2010	€1.8 M	€4.2 M	€5 M	€5.6 M

The financial situation

Statement of account in €

	2020	2021	Change
Operating income in €			
Contributions	34,563,207	51,131,030	48 %
Other income, of which reversal of provisions	2,253,471	1,617,848	-28 %
Total income	36,816,678	52,748,878	43 %
Operating costs in €			
Sorting funding costs	16,999,640	23,544,559	39 %
Local authority funding costs	4,091,006	4,622,969	13 %
R&D funding costs	729,307	595,104	-18 %
Sub-total of funding costs	21,819,953	28,762,631	32 %
Other costs in €			
Other purchases and external costs	1,957,297	2,234,689	14 %
Of which: Consultancy, studies and audit fees	803,894	899,056	12 %
Communications	740,578	742,119	0 %
Current operating expenditure	412,825	593,513	44 %
Taxes and duties	70,482	360,376	411 %
Personnel costs	1,134,387	1,885,233	66 %
Amortization	63,347	107,192	69 %
Provision on current assets	1,950,846	278,722	-86 %
Provision for future expenses	9,850,392	19,115,920	94 %
Other expenses, of which exceptional balance	2,050	0	-100 %
Sub-total of other expenses	15,028,801	23,982,131	60 %
Total expenses	36,848,754	52,744,763	43 %
Results in €			
Net operating result	-32,076	4,115	113 %
Income and financial costs	32,076	-4,115	-113 %
Company taxes	0	0	-
Net result	0	0	

Comparison of 2020–2021 balance sheets

Assets	2020	2021
Fixed		
Intangible	€180,049	€194,859
Tangible	€36,590	€72,881
Financial	€720	€3,000,320
Current		
Stocks	€0	€0
Receivables	€37,958,122	€60,564,111
Invested values	€2,704,847	€2,547,406
Available	€15,141,554	€6,056,973
Prepaid expenses	€19,675	€25,689
Total	€56,041,556	€82,462,238

Passive	2020	2021
Equity		
Capital	€40,000	€40,000
Reserves	€0	€0
Earnings	€0	€0
Provisions	€26,863,644	€45,979,564
Debts		
Financial	€6,388,000	€4,575,235
Suppliers	€15,800,860	€19,940,811
Fiscal and social	€6,661,580	€10,029,929
Other debts	€287,473	€1,896,699
Prepaid income		
Total	€56,041,556	€82,462,238

Illustrative 2022 financial plan

Funding for sorting recovery	
Number of tonnes	217,000
Change (compared to 2021)	14 %
Total amount	€28,210K

Investments for developing sorting	
Number of tonnes	21,700
Change (compared to 2021)	26 %
Total amount	€1,628K

Funding for material sorting	
Number of tonnes	10,500
Change (compared to 2021)	N.A.
Total amount	€1,575K

Funding for local authority communication operations	
Number of inhabitants covered	47,500,000
Change (compared to 2021)	7 %
Total amount	€4,750K

R&D funding	€1,215K
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Expenses excl. funding	€9,573K
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Total expenses	€46,951K
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**For a 100%
circular industry**

#RRRRR

Let's reuse

Let's repair

Let's recycle

Let's reduce