

The Digest's 2026 Multi-Slide Guide to Textile Recycling's Missing Buyer

Europe has plenty of used textiles. What it lacks is a buyer for sorted fibre — and the finance to build one.

THE PUZZLE · OBSERVED DATA

Europe exported over 1.44 Mt of used textiles. Its first automated sorter: ~203 t.

EU USED-TEXTILE EXPORTS · 2025

>1.44 Mt

shipped out of the EU, 48% to Asia and 43% to Africa

Reported · EEA, Eurostat ComExt data

SYSAV SIPTEX, MALMÖ · 2025

~203 t

sorted against a 24,000 t/yr design — about 0.85% (derived)

Measured · Sysav annual report 2025

The sorter worked. Its owner has now put it up for sale.

THE QUESTION · INTERPRETATION

Is textile recycling limited by feed — or by the buyer for sorted fibre?

The evidence points to the buyer, and to the finance to build one. Feed is abundant and much of it is exported; the plants meant to use it have failed, stalled or are still only announced.

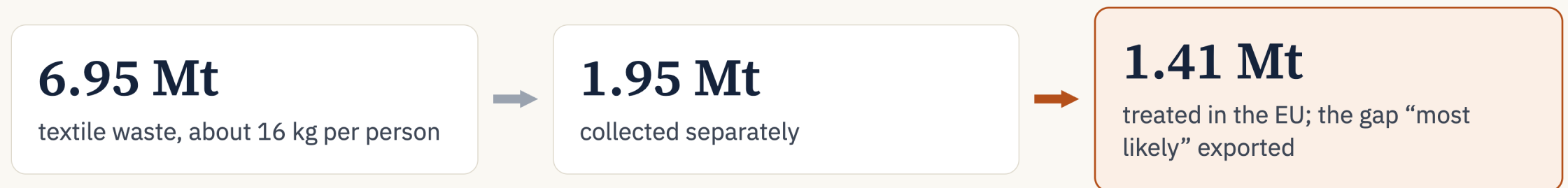
There is no shortage of used textiles. In the US, two-thirds went to landfill.

US textiles, 2018 (latest EPA): 17.03 Mt generated



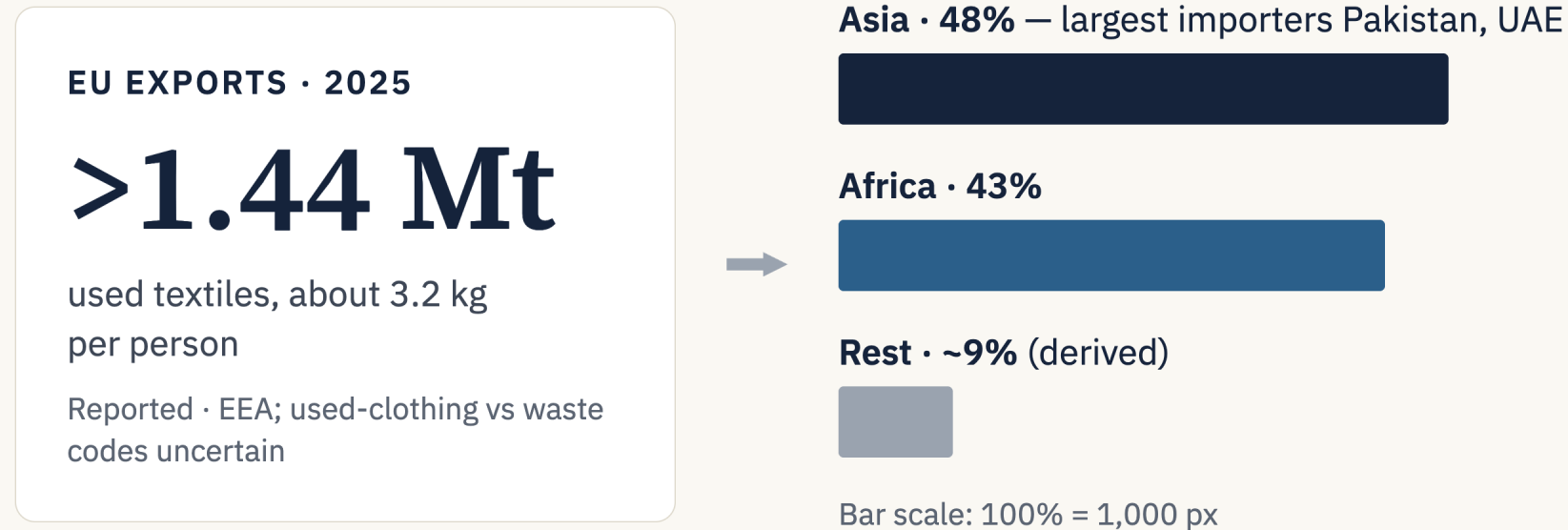
Shares derived. EPA’s “recycled” includes export for reuse and rags, not fibre-to-fibre.

EU textile waste, 2020



Sources: US EPA, Textiles: Material-Specific Data (2018 data, Reported); EEA, Management of used and waste textiles in Europe’s circular economy (2020 data, Reported)

The used-textile system's working offtake is export: over 1.44 Mt in 2025.



For scale: comparable to all separately collected EU textiles in 2020 (1.95 Mt).

Fibre-to-fibre is under 1% of EU textile waste; planned capacity is mostly downcycling.

TODAY

<1%

of EU textile waste is recycled
fibre-to-fibre

Consultant estimate · McKinsey, Jul 2022

POTENTIAL BY 2030

18–26%

of gross textile waste, if €6–7bn of
capex is built

Consultant estimate · McKinsey, Jul 2022
(modelled, not an outcome)

EXPECTED TO 2025

1.25–1.3

Mt/yr at 17 EU recyclers; ~1
Mt mechanical, mostly rags
and insulation

Consultant estimate via EEA (companies'
own expectations)

Renewcell sold 18,000 t from a 60,000 t/yr plant, then went bankrupt.

Ortviken nameplate · 60,000 t/yr of Circulose pulp



Sold in 2023 · 18,000 t — about 30% (derived), below half of break-even



Price

“Almost a third more” than viscose

Offtake

Tangshan Sanyou, Lenzing: “up to 275,000 t” over five years, not taken on time

Outcome

Board decided bankruptcy 25 Feb 2024; yield and quality issues also cited

Siptex sorted about 203 t in 2025. Sysav is selling it for lack of demand.

Design capacity · 24,000 t/yr (opened Nov 2020)



Environmental permit · 10,000 t/yr



Sorted in 2025 · ~203 t — 0.85% of design, 2.0% of permit (derived)



In Dec 2025 Sysav decided to divest, citing low demand for the end product. **The sorting worked; the buyer didn't exist.**

THE PIPELINE • ANNOUNCED

Every fibre-to-fibre buyer in this guide is still Announced, not operating.

Q4 2026	Circulose, Sweden (Altor-owned)	Restart on “confirmed demand” from 11 brands	Restart not yet confirmed
Undated	Infinited Fiber, Kemi, Finland	€400M, 30,000 t/yr; permitted Mar 2026	No financing; next step a ~200 t/yr demo
H1 2028	Carbios, Longlaville, France (PET)	Commissioning target; ~50% of capacity pre-contracted	Remaining financing; textile feed share undisclosed
Late 2029	Syre, Vietnam (H&M-backed)	US\$500–700M; Target offtake 70,000 t to 2030, ~50% of capacity	Vietnamese textile-waste import licences

Sources: FashionUnited, 16 Feb 2026; Yle, 28 May 2025 and 24 Mar 2026; CHEManager, 2 Jan 2026; ScandAsia, 12 Nov 2025; Modaes, 13 May 2026. All Announced

France has had textile EPR since 2007 and collects about 32% of what is sold.

France (Refashion), 2024 · more than 60% of the system relies on exports



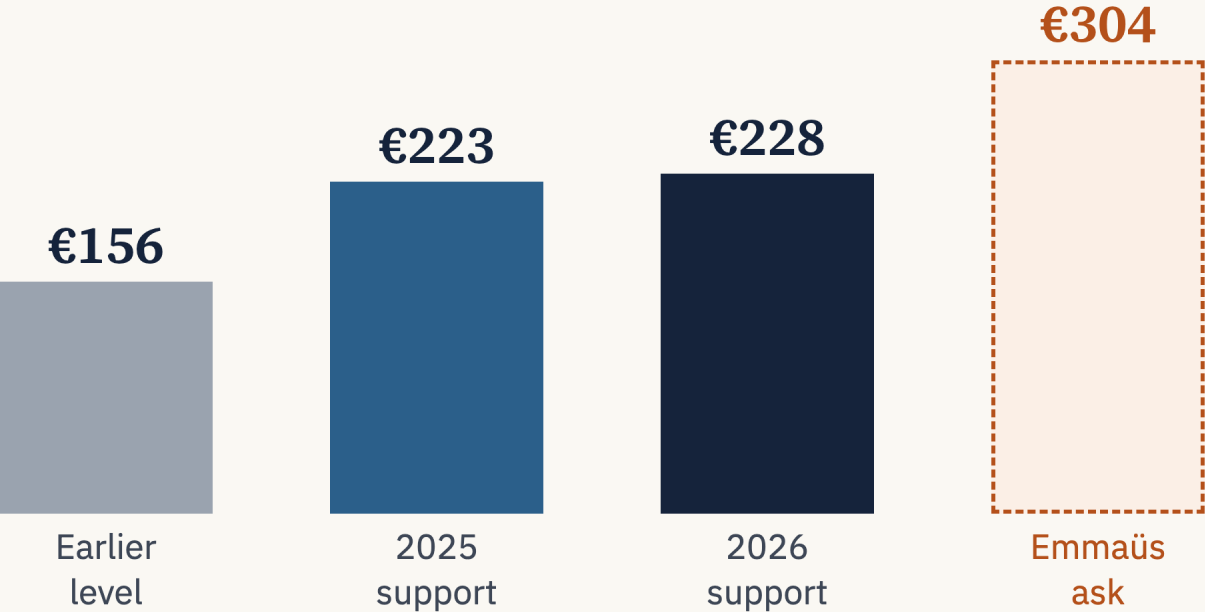
Next · EU Directive (EU) 2025/1892
Textile EPR schemes required in every member state by 17 Apr 2028

Next · California SB 707
PRO Landbell USA approved Mar 2026; rules no earlier than 1 Jul 2028; full implementation 2031

WHEN EXPORT PRICES FELL · OBSERVED DATA

When export prices fell, French sorters needed emergency support.

Refashion support per sorted tonne, € (scale: €304 = 340 px)



€6M

emergency aid, Jan 2025

€49M

from the State and Refashion, 2025

Causes cited: ultra-fast-fashion volume, collapsed export prices, resale platforms. Emmaüs warns over 5,000 jobs are at risk.

Infinited Fiber claimed buyers, yet has no financing and an unproven loop.

2023	Company claims binding agreements with seven customers (Vendor claim)
2024	Leases for the Kemi plant lapse; capital does not follow the offtake
May 2025	Project “on ice”; the Kemi subsidiary has zero staff
Mar 2026	Permit for a €400M, 30,000 t/yr plant; no financing, no investment decision
Next	A ~200 t/yr demonstration plant (Announced)

Here technology readiness still binds too: the full recycling loop has not been demonstrated.

COMPARATOR · INTERPRETATION

Cardboard loops because mills pay for baled grades. Textiles lack that buyer.

US CORRUGATED BOXES · 2018

96.5%

Reported · EPA, recycling rate

Aggregated at commercial back docks

Baled to a grade (OCC #11)

Mills pay a positive price

US TEXTILES · 2018

14.7%

Reported · EPA, “recycled” incl. reuse export, rags

Scattered across households

Blended fibres, elastane and trims

No paying buyer for sorted fractions

The mechanism is the Digest’s inference from the two streams, not an EPA finding.

WHAT MOST READERS MISS · INTERPRETATION

Europe's textile loop runs on export. The fibre buyer it needs has failed, stalled or is still years away.

More collection and more EPR fees add feed. Without a financed buyer for sorted fibre, that feed goes abroad or into subsidy.

Competing view: for chemical fibre routes, technology readiness still binds — Infinited Fiber has not demonstrated its full loop.

DECISION TEST

Six questions before backing a textile sorter or recycler

1. Who buys your sorted fraction, and at what price against virgin fibre?
2. Is your offtake a volume floor, or only “up to”?
3. What does the export outlet pay for the same tonnes?
4. Is your plant financed, or only permitted?
5. Which EPR fee reaches you, and when?
6. Does your feed licence depend on another country’s import rules?