

Textile Recycling Market Report by Product Type (Cotton Recycling, Wool Recycling, Polyester & Polyester Fiber Recycling, Nylon & Nylon Fiber Recycling, and Others), Textile Waste (Pre-consumer Textile, Post-consumer Textile), Distribution Channel (Online Channel, Retail & Departmental Store), End-Use (Apparel, Industrial, Home Furnishings, Non-woven, and Others), and Region 2024-2032

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Abstracts

The global textile recycling market size reached US\$ 5.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 6.7 Billion by 2032, exhibiting a growth rate (CAGR) of 2.49% during 2024-2032. The growing focus on environmental sustainability, imposition of government policies, changing consumer behavior, recent innovation in recycling technology, heightened awareness among textile producers, and increasing contribution of non-governmental organizations (NGOs) and other advocacy groups are some of the major factors propelling the market.

Textile recycling refers to the practice of repurposing or reusing old or unwanted textiles to create new products or materials. It involves collecting, sorting, cleaning, and reprocessing the textiles into usable forms. Textile recycling is widely used for the creation of industrial rags, upholstery stuffing, insulation material, carpet underlays, soundproofing, and raw materials for new textiles. Additionally, it finds utility in the automotive industries, pet care, and the construction sector. Textile recycling offers numerous benefits, such as waste reduction, conservation of raw materials, and energy savings.

The recent innovations in recycling technology, which allow more efficient sorting, cleaning, and repurposing of textiles, thus making the entire process more cost-effective and scalable, are propelling the market growth. Along with this, the easier transfer of technology and best practices across borders due to rapid globalization, which enables more countries to participate effectively in textile recycling, is contributing to the market growth. Besides this, the heightened awareness among textile producers regarding the cost savings earned through using recycled over virgin materials is favoring the market growth. Furthermore, the increasing contribution of non-governmental organizations (NGOs) and other advocacy groups in promoting recycling efforts is positively impacting the market growth. Additionally, the ongoing participation of the education sector in researching and developing sustainable textile practices is strengthening the market growth.

Textile Recycling Market Trends/Drivers:

The growing focus on environmental sustainability

The growing awareness and concern regarding environmental sustainability is a compelling factor driving the textile recycling market. The textile industry is one of the largest contributors to environmental degradation, with significant impacts ranging from high water usage to extensive carbon emissions. Furthermore, conventional textile manufacturing processes are resource-intensive, requiring large amounts of water, energy, and raw materials, which leads to extensive waste generation. Additionally, the growing public consciousness about climate change and resource depletion, resulting in heightened demand for sustainable alternatives, is acting as a growth-inducing factor. In line with this, textile recycling offers an effective way to mitigate various environmental issues, as it significantly reduces the waste that ends up in landfills, which are already reaching their capacity limits in many regions. Moreover, recycling textiles lessens the need for virgin resources, thereby reducing the associated environmental costs of extraction and transportation.

The imposition of government policies

The role of governmental bodies in shaping and steering the textile recycling market is a pivotal factor driving the market growth. Governments are enacting policies and legislation aimed at reducing waste and encouraging the use of recycled materials. Furthermore, regulations are being tightened around landfill use, imposing higher fees and stricter guidelines, which, in turn, makes textile recycling a more economically viable option. Besides this, subsidies or tax incentives are being offered to companies that adopt recycling or other eco-friendly practices. Moreover, international accords and

agreements on climate change, like the Paris Agreement, are also pressuring countries to adopt sustainable industrial practices. As a result, regulatory policies and incentives are prompting companies to invest in textile recycling, thereby contributing to the market growth.

The changing consumer behavior

Consumer behavior serves as a critical driving force in the textile recycling market. The rising global awareness about sustainability issues has made consumers more discerning in their choices, thus prompting the adoption of brands and products that reflect their own values toward environmental responsibility. Furthermore, the shifting trend towards ethical consumerism due to heightened awareness is profoundly influencing the textile industry. Moreover, the growing segment of consumers willing to pay a premium for sustainably produced goods, pushing brands to reevaluate their manufacturing processes and material sourcing strategies, is catalyzing the market growth. Additionally, numerous high-profile brands have launched clothing lines featuring recycled materials in response to the growing consumer demand. Besides this, the proliferation of information through social media and other platforms, which has made it easier for consumers to research and choose sustainable options, is positively impacting the market growth

Textile Recycling Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on product type, textile waste, distribution channel and end-use.

Breakup by Product Type:

- Cotton Recycling
- Wool Recycling
- Polyester & Polyester Fiber Recycling
- Nylon & Nylon Fiber Recycling
- Others

Cotton recycling dominates the market

The report has provided a detailed breakup and analysis of the market based on product type. This includes cotton recycling, wool recycling, polyester & polyester fiber

recycling, nylon & nylon fiber recycling, and others. According to the report, cotton recycling represented the largest segment.

Cotton recycling is dominating the market as cotton is one of the most widely used natural fibers in the textile industry. Its ubiquity means that there is a substantial volume of cotton waste generated, providing a large base of material for recycling efforts. Additionally, the properties of cotton, such as its natural biodegradability and relatively simple molecular structure, make it easier to recycle compared to synthetic fibers like polyester. It can be more readily broken down and reprocessed into new fibers or other cotton-based products, which simplifies the recycling process. Furthermore, the rising consumer demand for sustainable and natural fibers is acting as another growth-inducing factor. Besides this, cotton recycling has a lower environmental impact compared to producing virgin cotton. As a result, by recycling cotton, manufacturers can significantly reduce their water consumption and chemical use, aligning with current sustainable development goals.

Breakup by Textile Waste:

Pre-consumer Textile

Post-consumer Textile

Pre-consumer textile hold the largest share in the market

A detailed breakup and analysis of the market based on textile waste has also been provided in the report. This includes pre-consumer and post-consumer textiles. According to the report, pre-consumer textile represented the largest segment.

Pre-consumer textiles are dominating the market as these materials have not been exposed to wear and tear, stains, or laundering, which makes them easier to recycle. Furthermore, the recycled output often retains higher quality, thereby fetching a better market price and making it more appealing for applications that require durable material. Additionally, pre-consumer textile waste comes directly from manufacturers or suppliers, which is generated in bulk and is easier to collect, sort, and process, compared to post-consumer waste, which requires extensive sorting and cleaning. Besides this, pre-consumer textile waste is usually of the same type and grade of material, making it easier and more efficient to recycle. Moreover, governments and regulatory bodies are offering various incentives for reducing industrial waste, and businesses can qualify for these benefits by engaging in pre-consumer textile recycling.

Breakup by Distribution Channel:

Online Channel
Retail & Departmental Store

Retail & departmental store holds the largest share in the market

A detailed breakup and analysis of the market based on distribution channel has also been provided in the report. This includes online channel and retail & departmental store. According to the report, retail & departmental store accounted for the largest market share.

Retail and departmental stores are dominating the market as they benefit from high foot traffic, which enables them to serve as effective platforms for the collection and redistribution of recycled textiles, thereby facilitating a more extensive reach and higher adoption rates. Besides this, they have established brand reputations and customer trust, which is essential for the successful collection and sale of recycled textile products, as consumers often have reservations about the quality and usability of recycled goods. Moreover, retail and departmental stores have established supply chain management systems that are well-equipped to manage the collection, sorting, and distribution of recycled textiles efficiently. Along with this, the integration of textile recycling into their existing operations is often more seamless compared to smaller entities or specialized stores, which might lack such robust logistical frameworks.

Breakup by End-Use:

Apparel
Industrial
Home Furnishings
Non-woven
Others

Apparel holds the largest share in the market

A detailed breakup and analysis of the market based on end-use has also been provided in the report. This includes apparel, industrial, home furnishings, non-woven, and others. According to the report, apparel accounted for the largest market share.

Apparel is dominating the market owing to its sheer volume, which provides a

considerable amount of raw material for the textile recycling market. Additionally, the heightened consumer awareness about the environmental impact of fast fashion, making recycled textiles an attractive choice for apparel manufacturers, is contributing to the market growth. Furthermore, the relatively simpler supply chain for apparel production, as compared to other potential end-uses like industrial applications, makes it easier to incorporate recycled textiles. Along with this, the technology and expertise needed to recycle textiles into wearable clothing are more readily available, thereby lowering entry barriers for companies looking to venture into sustainable apparel. Moreover, fashion companies are bolstering their corporate social responsibility (CSR) profiles by using recycled materials, making apparel a lucrative sector for such initiatives.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Turkey
Saudi Arabia
Others

Asia Pacific exhibits a clear dominance, accounting for the largest textile recycling market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia-Pacific hosts some of the world's largest textile-producing countries, creating a substantial feedstock for recycling operations. Furthermore, the labor costs in the region are relatively low, which facilitates various stages of the textile recycling process, from collection and sorting to reprocessing, thereby making the region a hub for textile recycling. Additionally, the increasing awareness and adoption of sustainable practices in the region supported by various government initiatives and policies is positively impacting the market growth. Moreover, Asia Pacific has a rapidly growing middle-class population, which is increasingly concerned with sustainability and environmentally friendly practices. Apart from this, the region has strong intra-regional and international trade relations that facilitate the easy export of recycled textile products to other markets.

Competitive Landscape:

Major firms are developing advanced recycling technologies, including methods for sorting and cleaning textiles more efficiently and techniques for breaking down fibers to their most basic form for high-quality recycling. Furthermore, they are forming alliances with governments, non-governmental organizations (NGOs), and even competitors to improve the overall recycling infrastructure. Besides this, companies are leveraging marketing and public relations to build awareness about textile recycling. Additionally, they are increasingly adopting circular economy principles, where end-of-life textile waste is looped back into the production process, which not only promotes sustainability but also significantly reduces manufacturing costs. Moreover, several market players are focusing on making their supply chains transparent, allowing them to trace the origin of the materials used. In addition, they are looking to expand their operations internationally, particularly in emerging markets where consumer awareness about

sustainability is on the rise.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Anandi Enterprises
American Textile Recycling Service
Boer Group Recycling Solutions
I:Collect GmbH
Infinited Fiber Company
Patagonia
Prokotex
Pure Waste Textiles
Retex Textiles
Unifi, Inc.

(Please note that this is only a partial list of the key players, as the complete list is provided in the report.)

Recent Developments:

In June 2023, Boer Group Recycling Solution introduced mobile NIR spectroscopy solution to enhance the efficiency of identifying and sorting textile materials.

In October 2023, I:Collect GmbH attended Biotextfuture Fall 2022 forum along with other companies to discuss the prospects of scaling up sustainable textile recycling.

In May 2023, Infinited Fiber Company signed an agreement with SOEX on textile waste feedstock for Infinited Fiber's flagship factory.

Key Questions Answered in This Report

1. What was the global textile recycling market size in 2023?
2. What will be the global textile recycling market outlook during the forecast period 2024-2032?
3. What is the impact of COVID-19 on the global textile recycling market?
4. What are the major global textile recycling market drivers?
5. What are the major global textile recycling market trends?
6. What is the global textile recycling market breakup by product type?
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Figure 92: Global: Textile Recycling Industry: Value Chain Analysis

Figure 93: Global: Textile Recycling Industry: Porter's Five Forces Analysis

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