

Textile-to-Textile Recycling Market Forecasts to 2032 – Global Analysis By Material Type (Cotton, Polyester, Wool and Mixed Fibers), Source (Post-Consumer Waste and Post-Industrial Waste), Process (Mechanical, Chemical, Biological), End User and By Geography

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Abstracts

According to Statistics MRC, the Global Textile-to-Textile Recycling Market is accounted for \$5.1 billion in 2025 and is expected to reach \$6.4 billion by 2032 growing at a CAGR of 3.4% during the forecast period. Textile-to-textile recycling involves converting used or waste textile products into new textile materials, reducing environmental impact and conserving resources. This closed-loop process mechanically or chemically reprocesses fibers from garments or fabrics, minimizing waste and avoiding downcycling into lower-value applications. Applied in sustainable fashion, industrial textiles, and nonwovens, it supports circular economy principles by promoting resource efficiency and reducing landfill use. Innovations target enhancing fiber quality retention, reducing energy consumption, and increasing recycling yield, driving industry adoption amid growing consumer demand for sustainable, eco-friendly textiles.

According to the Environmental Protection Agency (EPA), textile recycling in the United States achieved a rate of 14.7% in 2018, with 2.5 million tons recycled.

Market Dynamics:

Driver:

Rising consumer demand for sustainable apparel

Rising consumer demand for sustainable apparel is a primary market catalyst. This paradigm shift, fueled by greater environmental consciousness, pressures brands to integrate circular economy principles into their business models. Consumers actively seek products with verified recycled content, viewing them as a direct counter to the waste generated by fast fashion. This creates a powerful commercial incentive for apparel companies to invest in and source from textile recycling initiatives. Consequently, this demand pulls recycled materials through the value chain, stimulating innovation and scaling collection and processing infrastructure to meet market expectations.

Restraint:

High cost of chemical recycling processes

The high cost of chemical recycling processes presents a significant barrier to widespread adoption. These advanced processes, while effective in handling blended fabrics, require substantial capital expenditure for specialized infrastructure and operate with high energy inputs. Moreover, the complex purification of output materials to achieve virgin-grade quality further escalates operational expenses. This cost premium makes the resulting recycled fibers less economically competitive compared to virgin synthetics or mechanically recycled alternatives, potentially limiting their use to high-value applications and restraining overall market growth in the short to medium term.

Opportunity:

Partnerships with fashion brands for take-back programs

Partnerships with fashion brands for take-back programs present a substantial growth opportunity. Such collaborations secure a consistent and high-volume supply of post-consumer textile waste, which is critical for scaling recycling operations. Additionally, these programs enhance brand equity by demonstrating a tangible commitment to sustainability, directly engaging the conscious consumer. Moreover, they provide brands with a closed-loop solution for their own products, moving beyond traditional linear models. This symbiotic relationship helps de-risk investment in recycling infrastructure while simultaneously providing brands with a storyworthy and impactful environmental initiative.

Threat:

Greenwashing and lack of standardization

Greenwashing and a lack of standardization pose a credible threat to market credibility. Unsubstantiated claims regarding recycled content or environmental benefits can erode consumer trust and investor confidence, potentially stalling market growth. The absence of universally accepted definitions and certifications for "recycled" materials creates ambiguity, making it difficult to verify claims and compare environmental footprints accurately. This could lead to market skepticism, consumer disillusionment, and potential regulatory backlash, undermining the efforts of legitimate operators and hindering the development of a transparent and trustworthy textile-to-textile recycling market.

Covid-19 Impact:

The COVID-19 pandemic initially disrupted the textile-to-textile recycling market through severe supply chain interruptions and temporary halts in collection programs, stalling feedstock availability. Lockdowns also caused a sharp decline in consumer spending on apparel, reducing post-consumer waste volumes. However, the crisis subsequently acted as an accelerator for sustainability, prompting an industry-wide reevaluation of resilient and circular supply chains. It heightened consumer awareness of environmental issues, fostering a greater appreciation for sustainable products and potentially accelerating long-term adoption of recycling practices as the market recovered.

The polyester segment is expected to be the largest during the forecast period

The polyester segment is expected to account for the largest market share during the forecast period due to its overwhelming prevalence in the global textile market, particularly from fast fashion and athletic wear. This provides a vast and consistent waste stream for recyclers to utilize. Additionally, the well-established mechanical and emerging chemical recycling technologies for polyethylene terephthalate (PET) are more advanced and commercially viable compared to those for natural or other synthetic fibers. The economic incentive to recycle this high-volume material is strong, ensuring its continued largest share as recycling rates for this ubiquitous polymer increase.

The chemical recycling segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the chemical recycling segment is predicted to witness the highest growth rate due to its technological capability to overcome the limitations of mechanical methods. It can effectively break down complex blended fabrics (e.g., poly-cotton) and produce virgin-quality fibers, which is paramount for high-end apparel applications. This technological superiority addresses a critical gap in recycling capabilities. Moreover, significant investments and innovations are focused on scaling these processes and reducing their historically high costs, positioning chemical recycling as the key solution for achieving a truly circular textile economy.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by its established position as the global hub for textile manufacturing and consumption, generating monumental volumes of pre- and post-consumer waste. Furthermore, growing government initiatives and regulations aimed at tackling textile waste in key countries provide a supportive policy framework. The presence of a massive consumer base increasingly concerned about sustainability creates demand-pull dynamics. Additionally, the region's robust industrial infrastructure and growing investments in recycling technologies consolidate its position as the largest and most critical market for textile recycling.

Region with highest CAGR:

The Middle East & Africa region is poised for the highest growth rate, albeit from a smaller base. This expansion is fueled by increasing investments in waste management infrastructure and a growing recognition of the economic opportunities within the circular economy. Governments are beginning to implement policies to divert textiles from landfills. Moreover, the region's strategic focus on developing its industrial sectors, including textiles, presents an opportunity to integrate recycling technologies from the outset, enabling a more sustainable growth trajectory compared to established markets.

Key players in the market

Some of the key players in Textile-to-Textile Recycling Market include Aditya Birla Group (Birla Cellulose), Andritz Group, Boer Group, Carbios, Circ, Eastman, Evrnu, Hyosung TNC, Infinited Fiber Company, Lenzing AG, Patagonia, Inc., Pure Waste, Renewcell, S?dra, Textile Recycling International, Unifi, Inc., and Worn Again Technologies.

Key Developments:

In June 2024, Evrnu launched 'The 360 Hoodie,' a direct-to-consumer product made with Nucycl®, a high-performance 100% recyclable material derived from cotton textile waste.

In February 2024, Eastman and Patagonia partnered to recycle 8,000 pounds of pre- and post-consumer clothing waste using Eastman's molecular recycling technology, producing new fibers from the waste.

In June 2023, Circ entered into a strategic partnership with Birla Cellulose to enhance textile-to-textile recycling, aiming to integrate recycled fibers within the textile industry.

Material Types Covered:

Cotton

Polyester

Wool

Mixed Fibers

Sources:

Post-Consumer Waste

Post-Industrial Waste

Processes Covered:

Mechanical Recycling

Chemical Recycling

Biological Recycling

End Users Covered:

Apparel

Home Textiles

Industrial Textiles

Automotive Textiles

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments

Textile-to-Textile Recycling Market Forecasts to 2032 – Global Analysis By Material Type (Cotton, Polyester, W...

- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL TEXTILE-TO-TEXTILE RECYCLING MARKET, BY MATERIAL TYPE

Textile-to-Textile Recycling Market Forecasts to 2032 – Global Analysis By Material Type (Cotton, Polyester, W...

- 5.1 Introduction
- 5.2 Cotton
- 5.3 Polyester
- 5.4 Wool
- 5.5 Mixed Fibers

6 GLOBAL TEXTILE-TO-TEXTILE RECYCLING MARKET, BY SOURCE

- 6.1 Introduction
- 6.2 Post-Consumer Waste
- 6.3 Post-Industrial Waste

7 GLOBAL TEXTILE-TO-TEXTILE RECYCLING MARKET, BY PROCESS

- 7.1 Introduction
- 7.2 Mechanical Recycling
- 7.3 Chemical Recycling
- 7.4 Biological Recycling

8 GLOBAL TEXTILE-TO-TEXTILE RECYCLING MARKET, BY END USER

- 8.1 Introduction
- 8.2 Apparel
- 8.3 Home Textiles
- 8.4 Industrial Textiles
- 8.5 Automotive Textiles

9 GLOBAL TEXTILE-TO-TEXTILE RECYCLING MARKET, BY GEOGRAPHY

- 9.1 Introduction
- 9.2 North America
 - 9.2.1 US
 - 9.2.2 Canada
 - 9.2.3 Mexico
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.2 UK
 - 9.3.3 Italy

- 9.3.4 France
- 9.3.5 Spain
- 9.3.6 Rest of Europe
- 9.4 Asia Pacific
 - 9.4.1 Japan
 - 9.4.2 China
 - 9.4.3 India
 - 9.4.4 Australia
 - 9.4.5 New Zealand
 - 9.4.6 South Korea
 - 9.4.7 Rest of Asia Pacific
- 9.5 South America
 - 9.5.1 Argentina
 - 9.5.2 Brazil
 - 9.5.3 Chile
 - 9.5.4 Rest of South America
- 9.6 Middle East & Africa
 - 9.6.1 Saudi Arabia
 - 9.6.2 UAE
 - 9.6.3 Qatar
 - 9.6.4 South Africa
 - 9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

11 COMPANY PROFILING

- 11.1 Aditya Birla Group (Birla Cellulose)
- 11.2 Andritz Group
- 11.3 Boer Group
- 11.4 Carbios
- 11.5 Circ
- 11.6 Eastman

- 11.7 Evrnu
- 11.8 Hyosung TNC
- 11.9 Infinited Fiber Company
- 11.10 Lenzing AG
- 11.11 Patagonia, Inc.
- 11.12 Pure Waste
- 11.13 Renewcell
- 11.14 S?dra
- 11.15 Textile Recycling International
- 11.16 Unifi, Inc.
- 11.17 Worn Again Technologies

List Of Tables

LIST OF TABLES

Table 1 Global Textile-to-Textile Recycling Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Textile-to-Textile Recycling Market Outlook, By Material Type (2024-2032) (\$MN)

Table 3 Global Textile-to-Textile Recycling Market Outlook, By Cotton (2024-2032) (\$MN)

Table 4 Global Textile-to-Textile Recycling Market Outlook, By Polyester (2024-2032) (\$MN)

Table 5 Global Textile-to-Textile Recycling Market Outlook, By Wool (2024-2032) (\$MN)

Table 6 Global Textile-to-Textile Recycling Market Outlook, By Mixed Fibers (2024-2032) (\$MN)

Table 7 Global Textile-to-Textile Recycling Market Outlook, By Source (2024-2032) (\$MN)

Table 8 Global Textile-to-Textile Recycling Market Outlook, By Post-Consumer Waste (2024-2032) (\$MN)

Table 9 Global Textile-to-Textile Recycling Market Outlook, By Post-Industrial Waste (2024-2032) (\$MN)

Table 10 Global Textile-to-Textile Recycling Market Outlook, By Process (2024-2032) (\$MN)

Table 11 Global Textile-to-Textile Recycling Market Outlook, By Mechanical Recycling (2024-2032) (\$MN)

Table 12 Global Textile-to-Textile Recycling Market Outlook, By Chemical Recycling (2024-2032) (\$MN)

Table 13 Global Textile-to-Textile Recycling Market Outlook, By Biological Recycling (2024-2032) (\$MN)

Table 14 Global Textile-to-Textile Recycling Market Outlook, By End User (2024-2032) (\$MN)

Table 15 Global Textile-to-Textile Recycling Market Outlook, By Apparel (2024-2032) (\$MN)

Table 16 Global Textile-to-Textile Recycling Market Outlook, By Home Textiles (2024-2032) (\$MN)

Table 17 Global Textile-to-Textile Recycling Market Outlook, By Industrial Textiles (2024-2032) (\$MN)

Table 18 Global Textile-to-Textile Recycling Market Outlook, By Automotive Textiles (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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