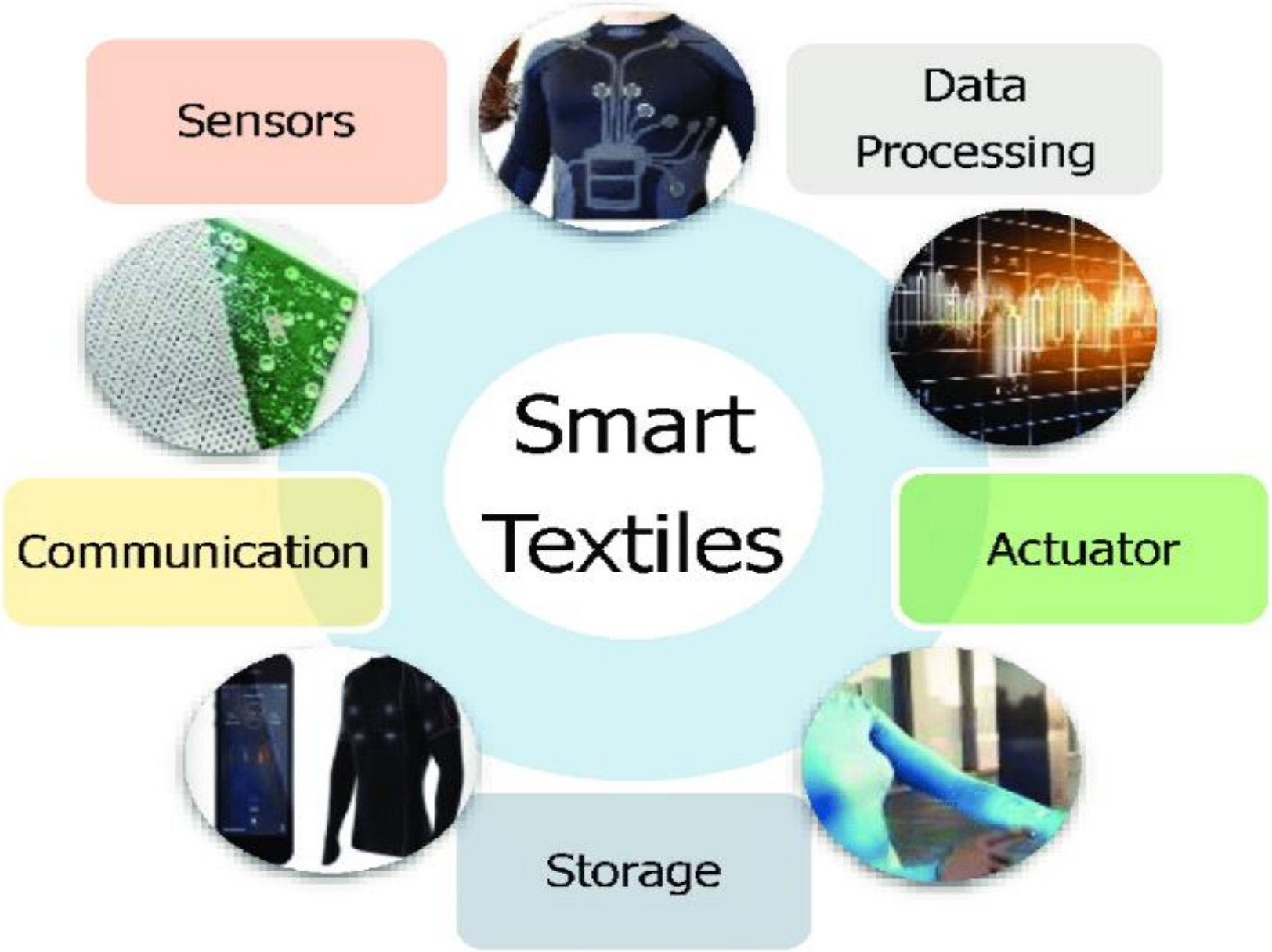
ICAC 83rd Plenary Meeting

Crafting National Textile Policies that Encourage Innovation and Enhance Global Competitiveness

V. Besim ÖZEK
Istanbul Textile & Raw Materials Exporters Association
Board Member

GLOBAL TRANSFORMATION



APPROACH

REDUCED WATER CONSUMPTION

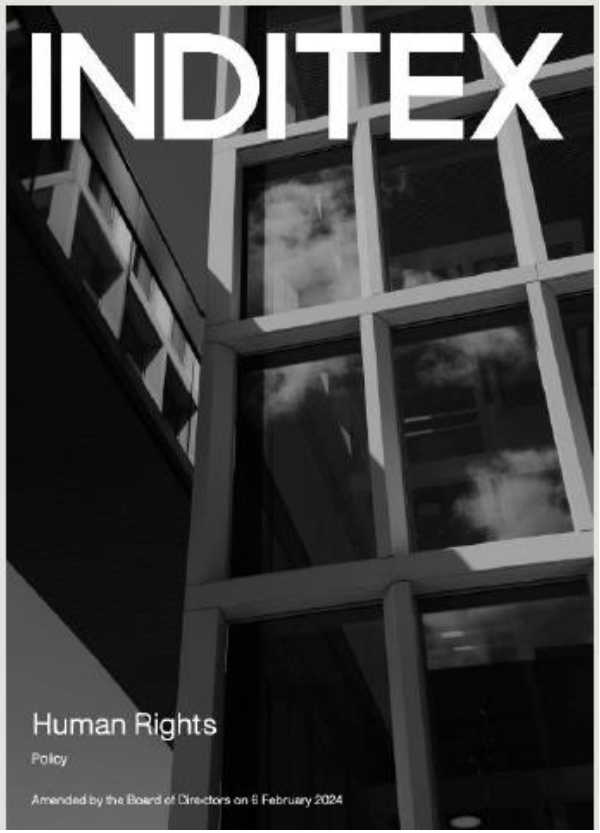
We have a Care for Water standard for water consumption that allows us to classify wet process facilities and set minimum water management requirements. As of November 2024, facilities must have a 'good' level of water consumption according to the standard and, as of July 2025, they must achieve 'excellent'. We also have assistance and technical support tools, such as the Best Available Techniques, with solutions to improve process optimisation and pre-treatment, dyeing and finishing recipes; investment in new, more efficient machinery; and recycling wastewater for use in textile processes. With the project, so far we have reduced water consumption in our supply chain by 22% compared to 2020, with a commitment to reach 25% by 2025.

We are working to ensure that 40% of the textile fibres we use come from conventional recycling.

About another 25% will come from organic or regenerative agriculture.

We estimate that 25% will be newly generated fibres that do not currently exist on an industrial scale, so we are investing in their development.

The remaining 10% will be other preferred options according to the indicators of reference organisations.



BOOSTING CLEAN ENERGY

We have committed to the United Nations Fashion Industry Charter for Climate Action by refraining from engaging new suppliers or manufacturers that use coal as an energy source starting July 2023. We also promote the use of renewable energy across our entire supply chain. To support our suppliers in adopting clean energy, we provide a catalogue of the best available techniques, which we have made accessible to the entire industry to accelerate sector-wide change.

APPROACH

Climate

— 2030: Reduce absolute scope 1, 2 and 3 greenhouse gas emissions by 56% against a 2019 baseline.*
Progress 2024: 41 % reduction in scope 1 and 2 emissions and 24% reduction in scope 3 emissions.

— 2040: Achieve net-zero by reducing absolute scope 1, 2 and 3 emissions by least 90% against a 2019 baseline, and balance out any remaining emissions with permanent carbon removals.*

* Both goals have been verified by the Science Based Targets Initiative.

Materials and resources

— 2025: 30% of materials sourced for commercial goods to be certified recyc
Progress 2024: 29.5%.

— 2030: 100% of materials sourced for commercial goods to be either recycle
Progress 2024: 89%.

Packaging

— 2025: 25% reduction in plastic packaging against a 2018 baseline.
Progress 2024: 54%.

— 2030: Make 100% of packaging from recycled or sustainably sourced mater
recycled materials.
Progress 2024: 84%.

Chemicals

— 2030: 100% of chemical inputs in tier 1 and 2 production factories comply with ZDHC's Manufacturing Restricted Substances List.
Progress 2024: 97%.

Water

— 2025: Reduce absolute total freshwater use in tier 1 and 2 production factories by 10 % against a 2022 baseline.
Progress 2024: 9.5%

Fair and equal

Our ambition is to respect human rights across our value chain.

— Annual increase in % of supervisors in our tier 1 production supply chain that are female.
Progress: 2024 – 25%, 2023 – 27%, 2022 – 27%, 2021 – 28%, 2020 – 24%.

— Annual increase in % of worker representatives in our tier 1 production supply chain that are female.
Progress: 2024 – 65%, 2023 – 63%, 2022 – 63%, 2021 – 62%, 2020 – 59%.

INDITEX

/ Inditex fibres and materials classification

THIS DOCUMENT IS SUBJECT TO PERIODIC UPDATION

V2 November '23

FIBRES AND MATERIALS		NATURAL						MAN-MADE				SYNTHETIC			
		VEGETABLE			ANIMAL										
		Cotton	Flax	Hemp	Down-feathers	Wool, cashmere and other	Leather and other	Viscose	Lyocell	Modal	Acetate and cupro	Polyester	Polyamide 6 and 6.6	Other	PU
PERMITTED FIBRES AND MATERIALS															
BEST FIBRES	STAPLE FIBRE	Organic cotton	European flax	Organic hemp		Recycled wool		Lenzing's Ecovero™ Viscose, from China and Austria	Lenzing's Tencel™ Lyocell	Lenzing's Modal, from Austria	Eastman's Naia™ Acetate	Recycled polyester	Recycled polyamide 6	Recycled acrylic	
		Cotton in conversion /transition to organic	Organic flax			Responsible wool		Birla's Livaeco™ Viscose, from China/Thailand/Vilayat	Lenzing's Refibra™ Lyocell	Birla's Modal, from Thailand/Vilayat-India		Unifi's recycled polyester with REPREVE® traceability[7]	Recycled polyamide 6.6		
		Recycled cotton	Mechanically recycled flax			Recycled cashmere		Sanyou's Ecotang Viscose	Birla's Excel Lyocell	Sanyou Modal, from China		Indorama Group DEJA™ recycled polyester[7]	Unifi recycled polyamide with REPREVE® traceability[7]		
								Jilin's FSC Viscose	Kelheim Fibres's Ecocell™ Lyocell						
								Mechanically recycled viscose	Mechanically recycled lyocell						
								Renewcell Innovation viscose[1]							
	FILAMENT							Enka's Viscose	Lenzing's Tencel™ Luxe Lyocell		Eastman's Naia™ Acetate	Recycled polyester	Recycled polyamide 6	Recycled elastane	
								Birla's Rayski® Viscose, from Veraval	Acegreen's Lyocell		Eastman's Naia™ Renew Acetate[1]	Unifi's recycled polyester with REPREVE® traceability[7]	Recycled polyamide 6.6	Recycled polypropylene	
								Jilin's FSC Viscose				Indorama Group DEJA™ recycled polyester[7]	Unifi's recycled polyamide with REPREVE® traceability[7]	Recycled elastomultiester	
												Zhejiang Haili REBOYARN® recycled polyester[7]	Prutex PRUECO® recycled polyamide[7]		
												Jiangsu Eastern Shenghong REBORN™ recycled polyester[7]			
												Zhongyuan Runsheng RECOYARN® recycled polyester[7]			
	OTHER MATERIALS				Recycled down-feathers		Leather Working Group leather								
					Responsible down-feathers		Regenerated leather								
BETTER FIBRES	STAPLE FIBRE	Better Cotton													
	FILAMENT							Canopy Green Viscose filament[4]							
	OTHER MATERIALS														DMF-free PU
CONVENTIONAL FIBRES[2]	STAPLE FIBRE		Conventional flax[3]	Conventional hemp		Conventional wool and cashmere						Conventional polyester[3]	Conventional polyamide	Conventional acrylic	
	FILAMENT										Conventional cupro[5]	Conventional polyester[3]	Continuous filament conventional polyamide	Conventional elastomultiester, polypropylene, and elastane	
	OTHER MATERIALS				Conventional down-feathers		Conventional leather and chrome-free leather								Conventional PU
BANNED FIBRES AND MATERIALS															
STAPLE FIBRES AND/OR FILAMENTS		Conventional cotton				Angora and mohair		Canopy Green lyocell, modal and viscose staple fibre							
								Conventional acetate, lyocell, modal and viscose							
OTHER MATERIALS					Products from animals slaughtered exclusively for their skin, shell, horns, bones or down-feathers										
					Products from wild, exotic or endangered animals										
					Fur[6]										

H&M

Material Benchmark
Valid for all brands in H&M group

Version 4.0
FOR INTERNAL USE ONLY

FIBER/MATERIAL	A	B	C	D
	Materials which have the lowest environmental impact within their category - most often recycled fibers that give resources a new life. Within this category is regenerative organic farming which prioritize soil health.	*Materials which have a low environmental impact within their category - most often organic or sustainably sourced options which help ecosystems regenerate.*	*Materials which have an improved environmental impact compared to the conventional option - most often through more sustainable manufacturing or responsible farming practices.*	*Conventional or virgin materials which have the highest environmental impact within their category - most often fossil-fuel based*
COTTON	**A**	**B**	**C**	**D**
	RECYCLED COTTON WITH GRS OR RCS CERTIFICATION *REGENERATIVE ORGANIC, Regenerative Organic Std, ROC* *OCA FED programme* *IN CONVERSION COTTON TROUGH FARM PROJECTS, OCS*	*ORGANIC COTTON, WITH OCS OR GOTS CERTIFICATION*	*BETTER COTTON (Better cotton initiative, BCI)*	*CONVENTIONAL COTTON*
MAN-MADE CELLULOSICS	**A**	**B**	**C**	**D**
	RECYCLED CELLULOSICS FEEDSTOCK (≥30% for staple and ≥20% for filament) WITH GRS OR RSC CERTIFICATION *AGRICULTURAL RESIDUES FEEDSTOCK, Physical*	*FSC CERTIFIED WOOD AND CLOSED-LOOP PROCESS* *OR* *RECYCLED CELLULOSICS FEEDSTOCK (≥20% for staple and ≥10% for filament)*	*FSC CERTIFIED WOOD FEEDSTOCK* *FACILITY TO MEET EU BAT AND MEETING ZDHC GUIDELINES, ASPIRATIONAL LEVEL BY LATEST 2025*	*CONVENTIONAL MMCF*

GAP

PREFERRED FIBER SUSTAINABILITY RANKING

This is meant to serve as high-level guidance and is subject to changes as the market matures and sustainable fibers become more mainstream. Pending approval of additional fibers as reviewed by Gap Inc. Communication of scores: https://product.higg.org/terms-of-use.

*No sustainable solution for Nylon 6.6 exists yet.
**BCI cotton used as a proxy for MyBMP Australian Cotton.
*** US Cotton LEADSSM assessed as an example; include Supima cotton

	COTTON & LINEN	CELLULOSICS	WOOL & ACRYLIC	NYLON & SPANDEX	POLYESTER
BEST	Recycled Cotton - GRS	LENZING TENCEL™ Refibra LENZING™ Viscose – Europe (ECOVERO™) LENZING TENCEL™ Modal		Recycled Nylon 6 - GRS	Recycled Polyester (Blend) GRS
BETTER	Organic Linen - GOTS Organic Linen - OCS Organic Cotton - GOTS Organic Cotton - OCS Recycled Cotton - RCS	LENZING TENCEL™ Lyocell Eastman Naia™ Viscose Acetate LENZING™ Viscose – Asia (ECOVERO™)	Recycled Wool - GRS Recycled Wool - RCS Organic Wool - GOTS Organic Wool - OCS	Asahi Kasei ROICA™ Recycled Spandex Recycled Nylon 6 - RCS	Recycled Polyester (Blend) RCS C2C/bluesign Certified Polyester
GOOD	Better Cotton Initiative (BCI) Verified Australian Cotton** Verified US Cotton***	Asahi Kasei Bemberg™ Cupro Generic Lyocell	Responsible Wool	C2C/bluesign Certified Nylon 6	
AVOID WHERE POSSIBLE	Conventional Linen Conventional Cotton	Generic Modal Generic Viscose	Conventional Acrylic Conventional Wool	Virgin Elastane Virgin Nylon 6 Virgin Nylon 6.6*	Virgin Polyester
UNDER REVIEW				Partially Biobased Nylon 4.10	Partially Bio-based (30%) PET (TORAY) Ecodear® Mechanically Recycled Polyester - GRS Biodegradeable Polyester Bio-based bluesign Certified Elastane Partially Bio-based (37%) PTT Dupont (Sorona®)

Hugo Boss

RAW MATERIAL OVERVIEW & RATING

TARGET RELEVANCE

1. RESPONSIBLE

HERO

Our strategic focus materials

PLANT BASED
- ✓ Regenerative Cotton
- ✓ Regenerative Linen
- ✓ Regenerative Hemp
- ✓ Regenerative Kapok
- ✓ Recycled Cotton

MAN MADE CELLULOSE
- ✓ HeiQ AeoniQ™
- ✓ Canopy Next Gen
- ✓ Circulose® (Renewcell)
- ✓ Seacell™
- ✓ Natural Fiber Welding
- ✓ Lenzing Refibra™
- ✓ Recycled Viscose

ANIMAL BASED
- ✓ Regenerative Wool
- ✓ Regenerative Cashmere/Mohair
- ✓ Recycled Wool
- ✓ Recycled + Cashmere/Mohair

RESPONSIBLE

PLANT BASED
- ✓ Organic cotton
- ✓ Cotton made in Africa
- ✓ RESPONSIBLE Cotton
- ✓ Organic cotton in conversion
- ✓ Better Cotton - Physical
- ✓ The Egyptian Cotton Project
- ✓ Linen, Hemp, Kapok

MAN MADE CELLULOSE
- ✓ Canopy certified
- ✓ Lenzing™
- ✓ Cupro, Bemberg

ANIMAL BASED
- ✓ RESPONSIBLE Wool
- ✓ RESPONIBLE Mohair
- ✓ RESPONSIBLE Cashmere
- ✓ LWG Gold
- ✓ Olivenleder + LWG Silver

RECYCLED SYNTHETICS
- ✓ Recycled Polyester Textile Waste
- ✓ Recycled Nylon

- ✓ Other certified fibres according to the RESPSONIBLE Product Policy

2. COMPANY TARGET & SOURCING STANDARD

- ✓ Mulesing free wool
- ✓ Better Cotton - Mass balance
- ✓ LWG Leather Working Group silver & bronze or comparable standards
- ✓ RESPONSIBLE Cashmere (≥ 60%)

3. PHASE OUT

We start reducing and phase out

- Conventional cotton (no standard) until W25
- Generic mulesed wool until W30
- Recycled Polyester/Nylon until W30
- Virgin Polyester/ Polyamide/PU until W30
- PVC
- Recycled Polyester from PET bottles until W30*
- Non certified Cashmere

* NOT RESPONSIBLE SR24 ONWARDS

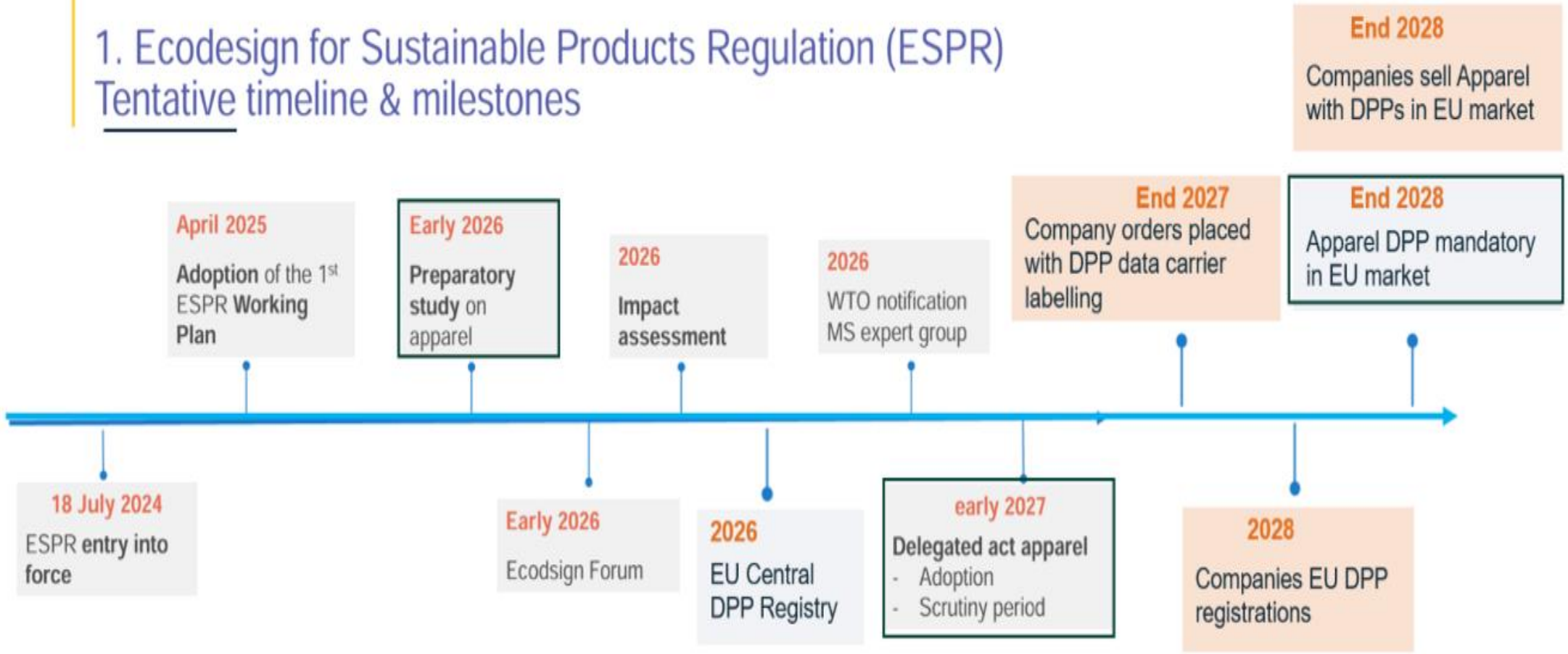
4. DO NOT USE

We never use

- X Non certified Mohair
- X Angora
- X Exotic fur
- X Exotic leather
- X Down from live plucking
- X Non canopy certified Man Made Cellulose

REGULATIONS

1. Ecodesign for Sustainable Products Regulation (ESPR)
Tentative timeline & milestones



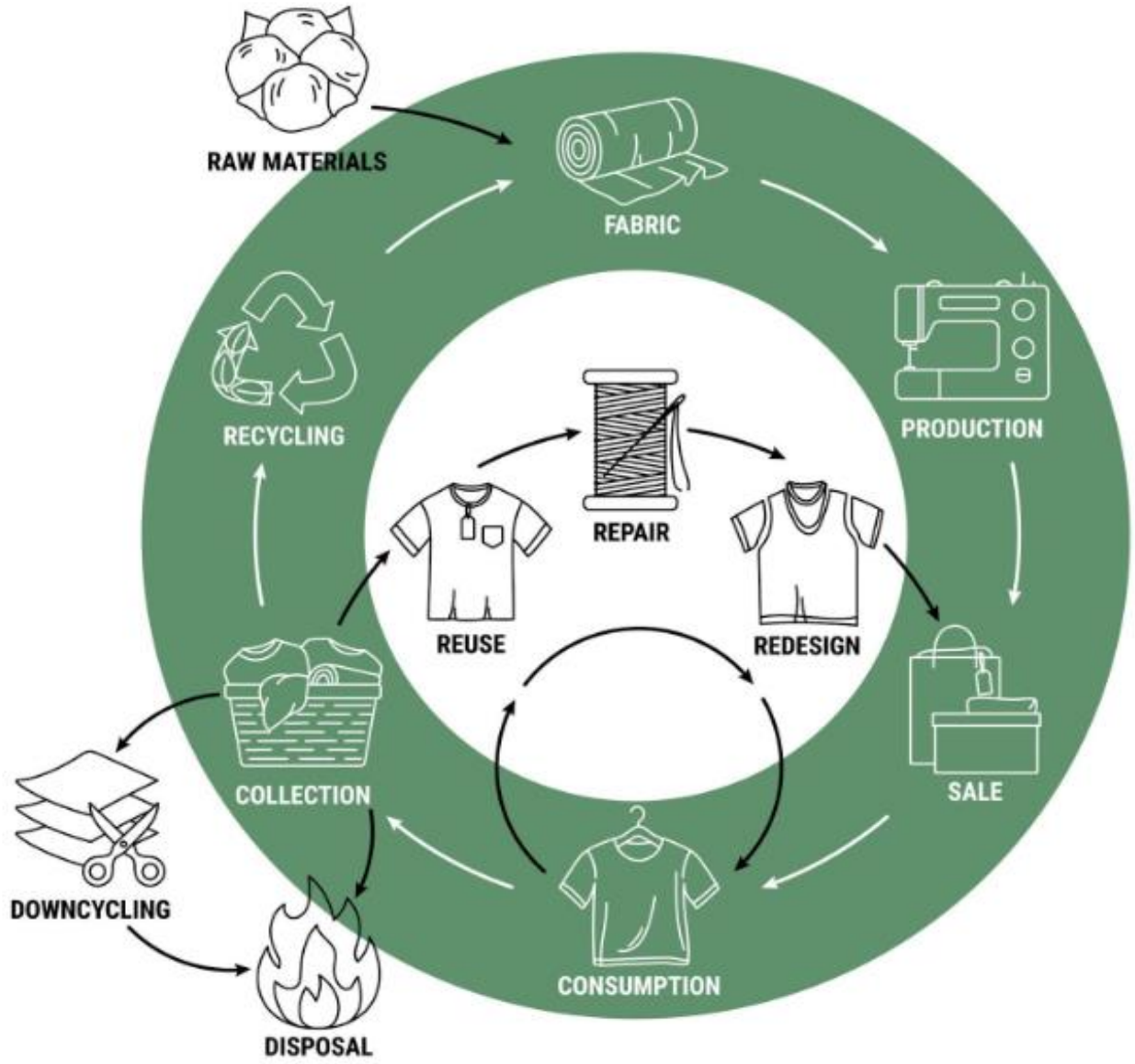
European Commission

REGULATIONS

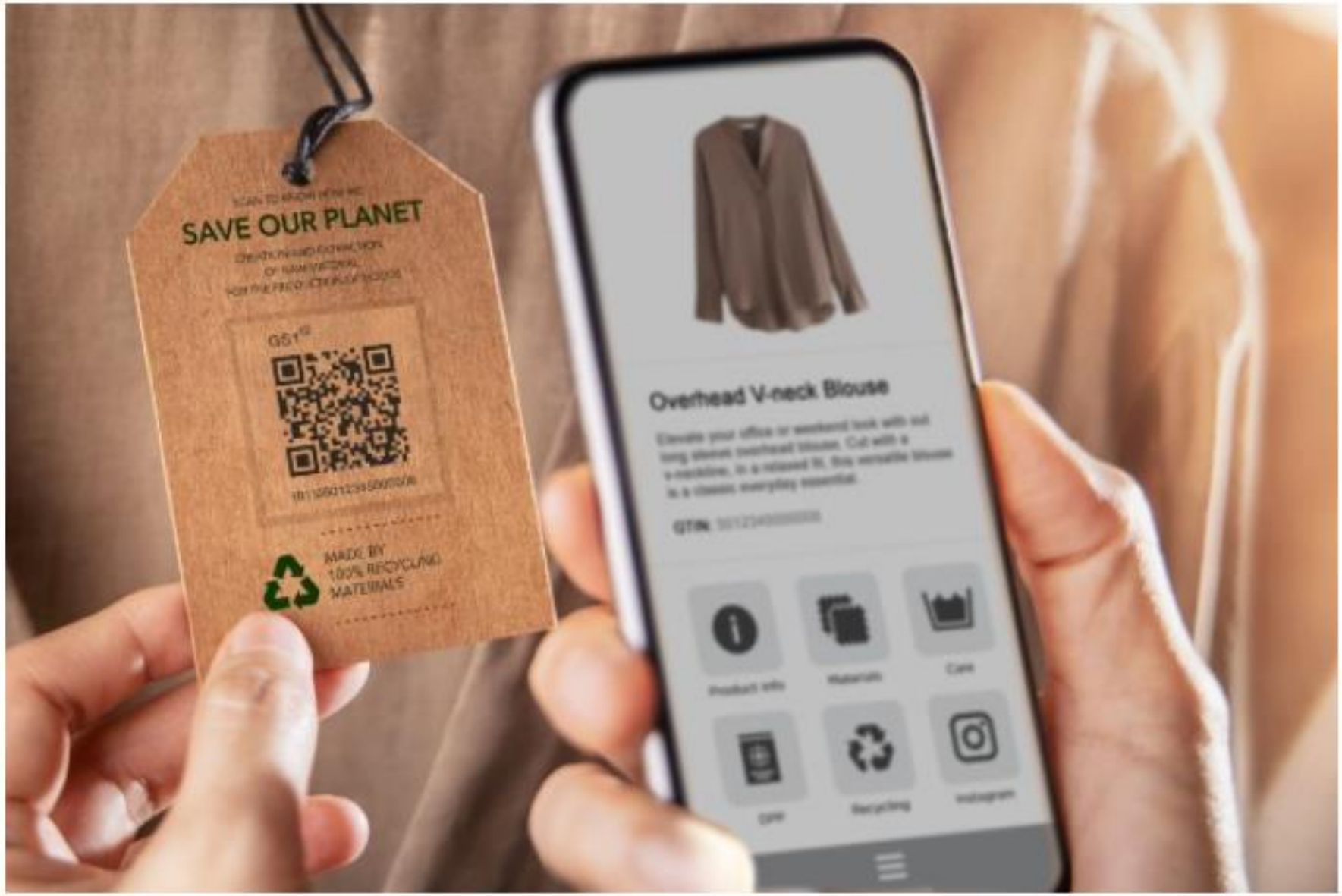
A New Era for Product Transparency with EU Regulations

EU legislations from now to 2035 make early Digital Product Passport adoption a strategic move for transparency and supply chain management.

DIGITAL PRODUCT PASSPORT



DIGITAL PRODUCT PASSPORT



Sectors Covered by DPP

01 Batteries

The DPP will initially cover batteries, focusing on sustainability and traceability to enhance consumer trust.

02 Electronics

Electronics will also be prioritized, ensuring transparent information about materials, manufacturing, and end-of-life processes.

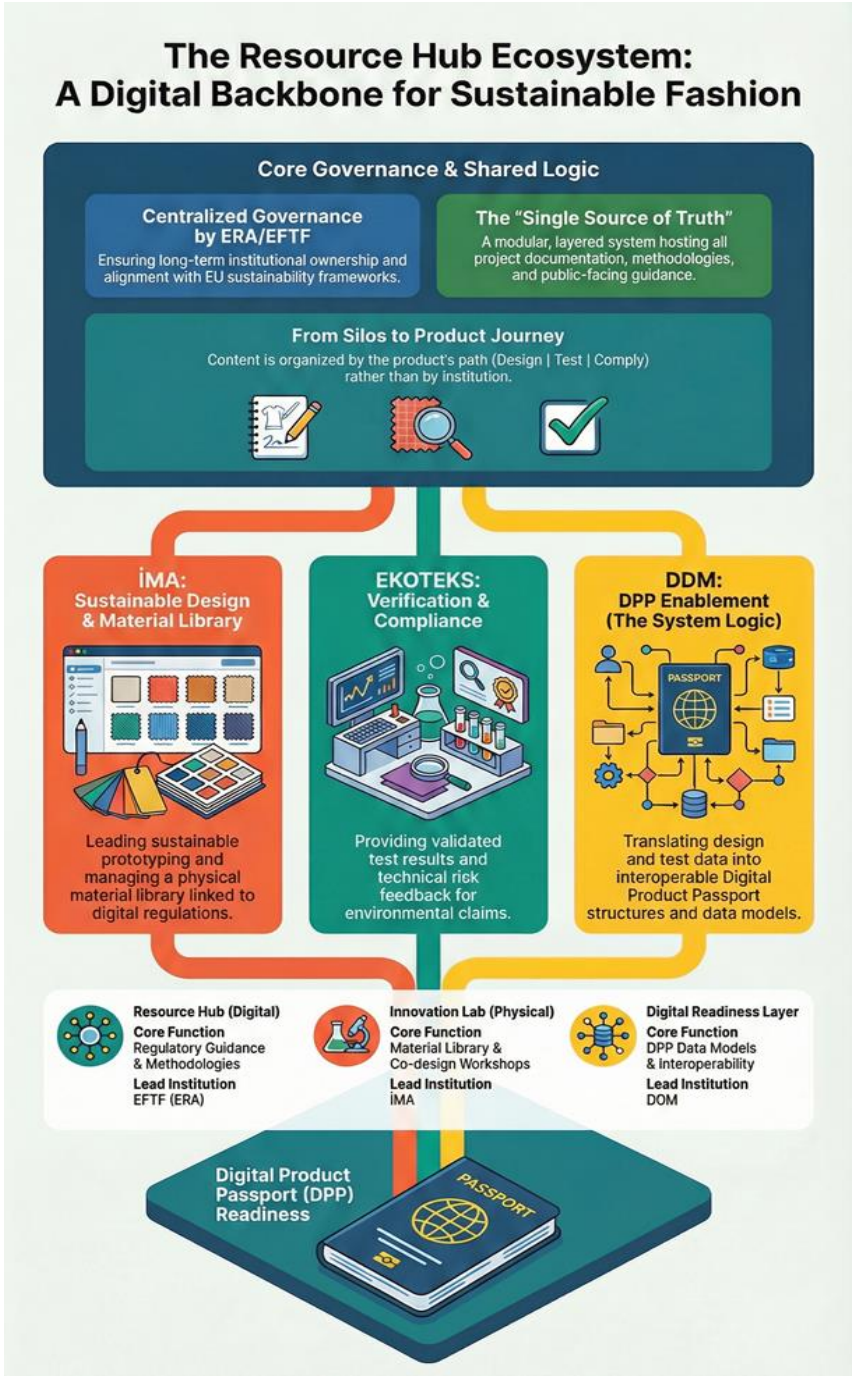
03 Textiles

Textiles are slated for early rollout, promoting sustainable practices and reducing waste in the fashion industry.

Preparing Turkish Textile Industry;

IPA III Project;

- LCA
- Carbon foot print
- Water foot print
- Digitilization of textile value chain (fiber to garments)
- DPP



ULTRA FAST FASHION PROBLEM

The future of textiles will be determined by those who combine innovation, sustainability, and fair regulation within a globally enforced system