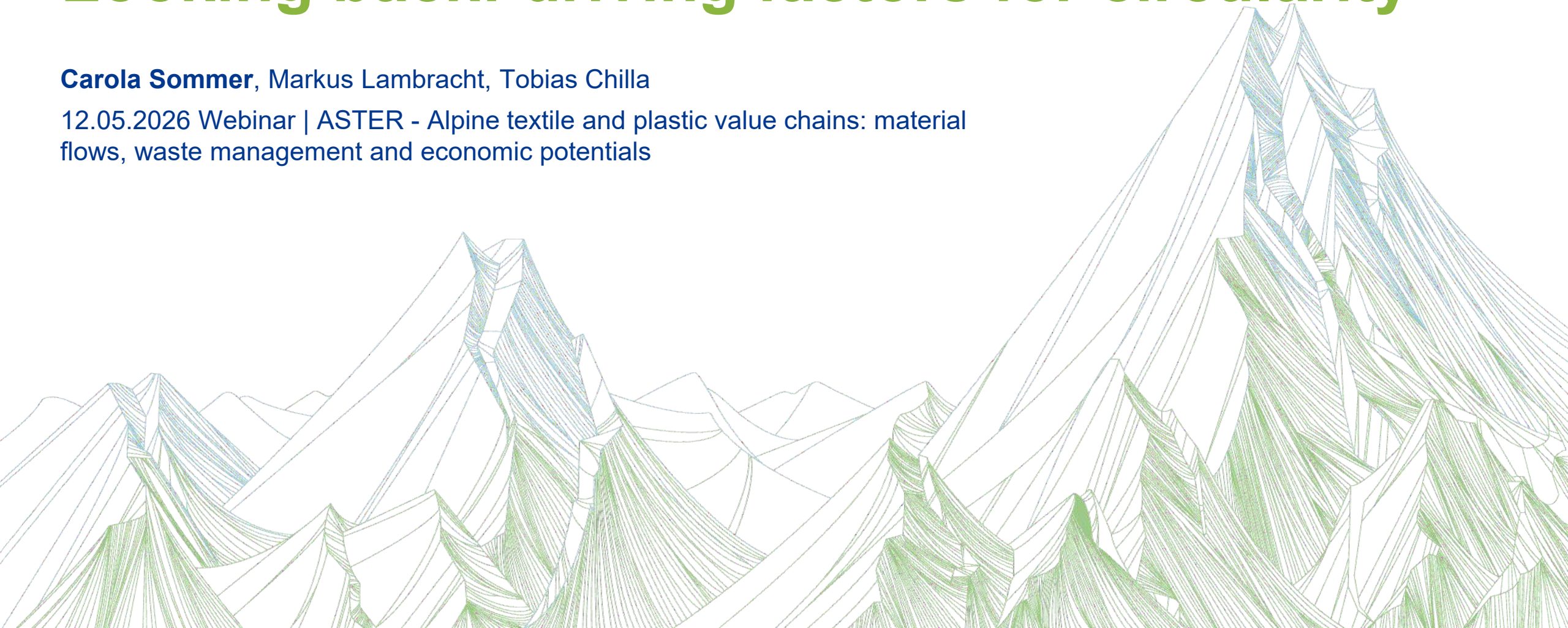


Looking back: driving factors for circularity

Carola Sommer, Markus Lambracht, Tobias Chilla

12.05.2026 Webinar | ASTER - Alpine textile and plastic value chains: material flows, waste management and economic potentials



2025

Community News

Crisis in Europe's Textile Sorting Sector: A Domino Effect Threatening Sustainability

by Juliette Tafreschi 18 Sep 2025



In October 2024, as part of the *Asia Garment Hub's* coverage of industry developments, **EuRIC Textiles** (a division of the European Recycling Industries' Confederation, EuRIC) and **Municipal Waste Europe (AISBL)**, a non-profit association, released a joint statement highlighting the unprecedented crisis facing the European textile sorting and recycling industry - challenges that remain highly relevant today.

2026

BoF

RETAIL LUXURY BEAUTY SPORTS SUSTAINABILITY MARKETING TECHNOLOGY GLOBAL MARKETS FASHION WEEK WORKPLACE & TALENT

Join BoF Professional today for agenda-setting analysis and advice. Start your 14-day trial for just €1. [START TRIAL](#)

SUSTAINABILITY

Textile Recyclers Are Back From the Brink. Now They Just Need Customers.

Europe's textile-to-textile recycling sector is rebounding from a crisis and regaining momentum as new regulations drive investment. But to succeed in the long run, it needs more brands to buy in.

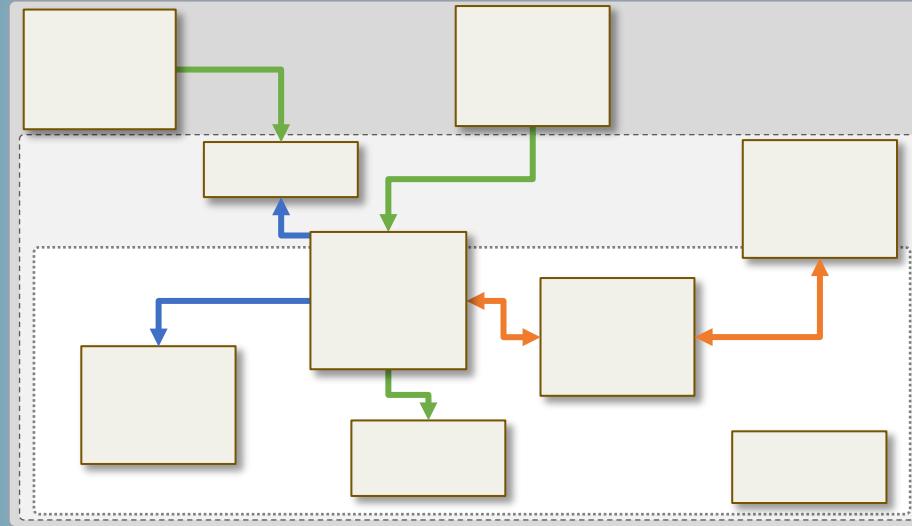





Key aim I: Network

What are the relevant network linkages that affect the economic status quo?

- Network linkages
- Scale and national context
- Data: D 1.2.1 findings, supplemented with interviews



- Consumption
- Campaigning



- Financial Support
- Regulation



- B2B Linkages
- Industry Cooperation

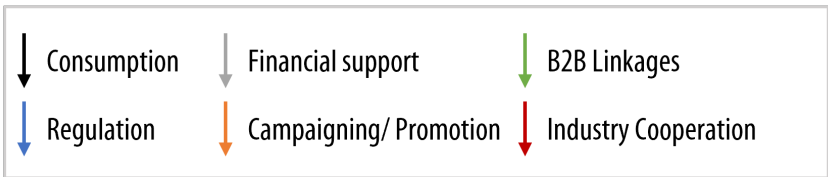
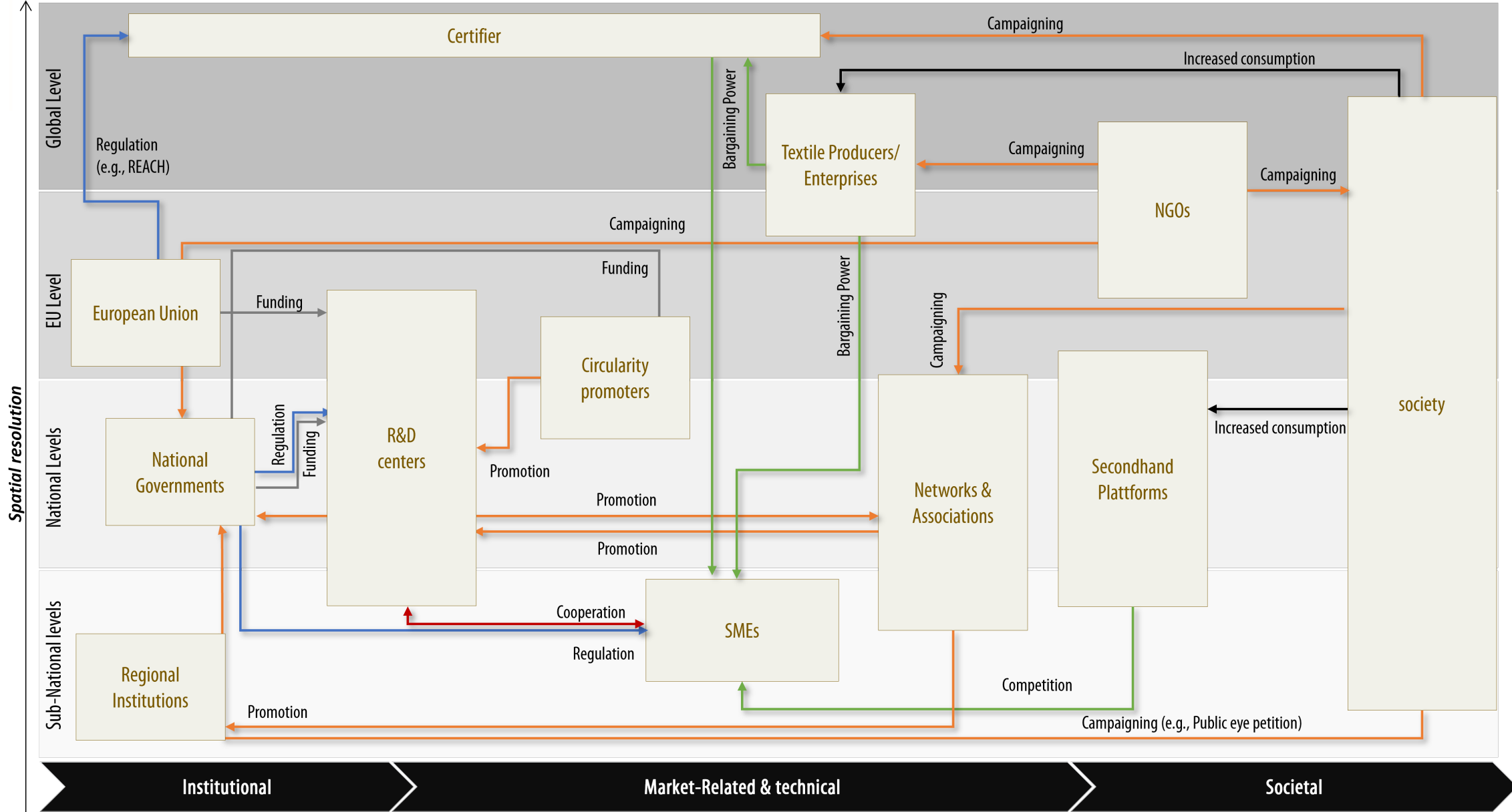


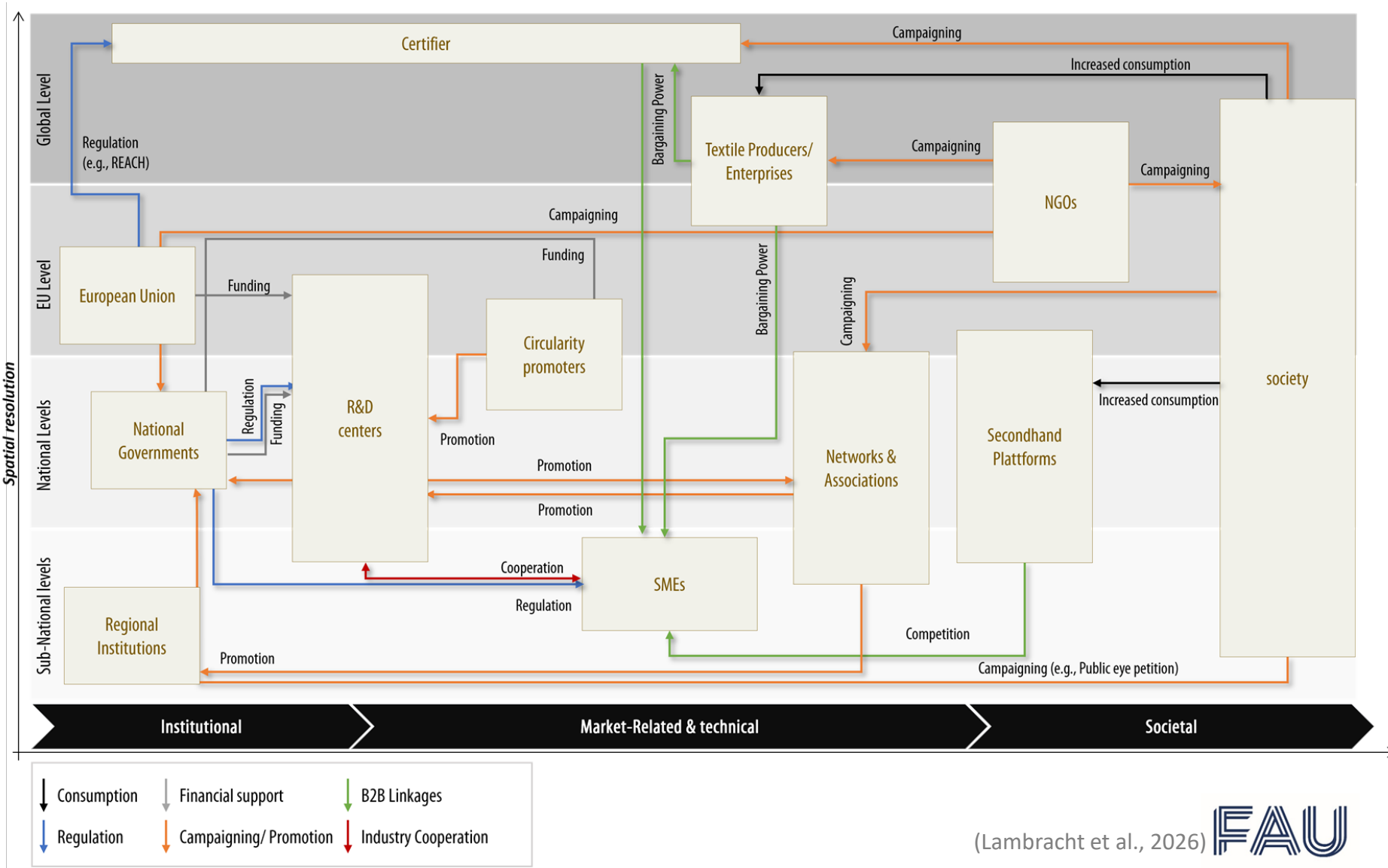
Key aim II: Time and scale

What kind of events have an impact on which level that led to the economic status quo?

- Time-related aspects
- Scale and national context
- Data: D 1.2.1 findings, supplemented with interviews







Dual role of institutional actors

- Regulation & governance processes
- Enablers of transformation

Vertical and horizontal linkages

- Vertical linkages influence strategic decision-making
- Small-scale B2B linkages & collaborative research

Societal limits vs. regulatory frameworks

- Increase in textile consumption
- Expansion of second-hand platforms etc.
- Civil society seeks to influence consumers and businesses

(Lambracht et al., 2026) 





Key aim I: Network

What are the **relevant network linkages** that affect the **economic status quo**?

- Network linkages
- Scale and national context
- Data: D 1.2.1 findings, supplemented with interviews



Key aim II: Time and scale

What kind of **events** have an impact on which **level** that led to the economic status quo?

- Time-related aspects
- Scale and national context
- Data: D 1.2.1 findings, supplemented with interviews



Societal

e.g. Consumers, broader developments (fast fashion)



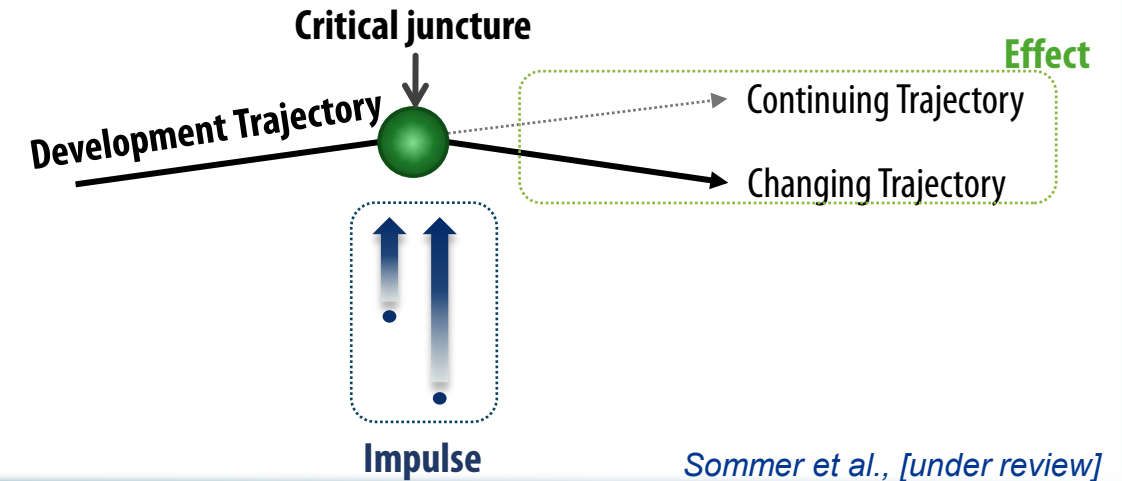
Policy

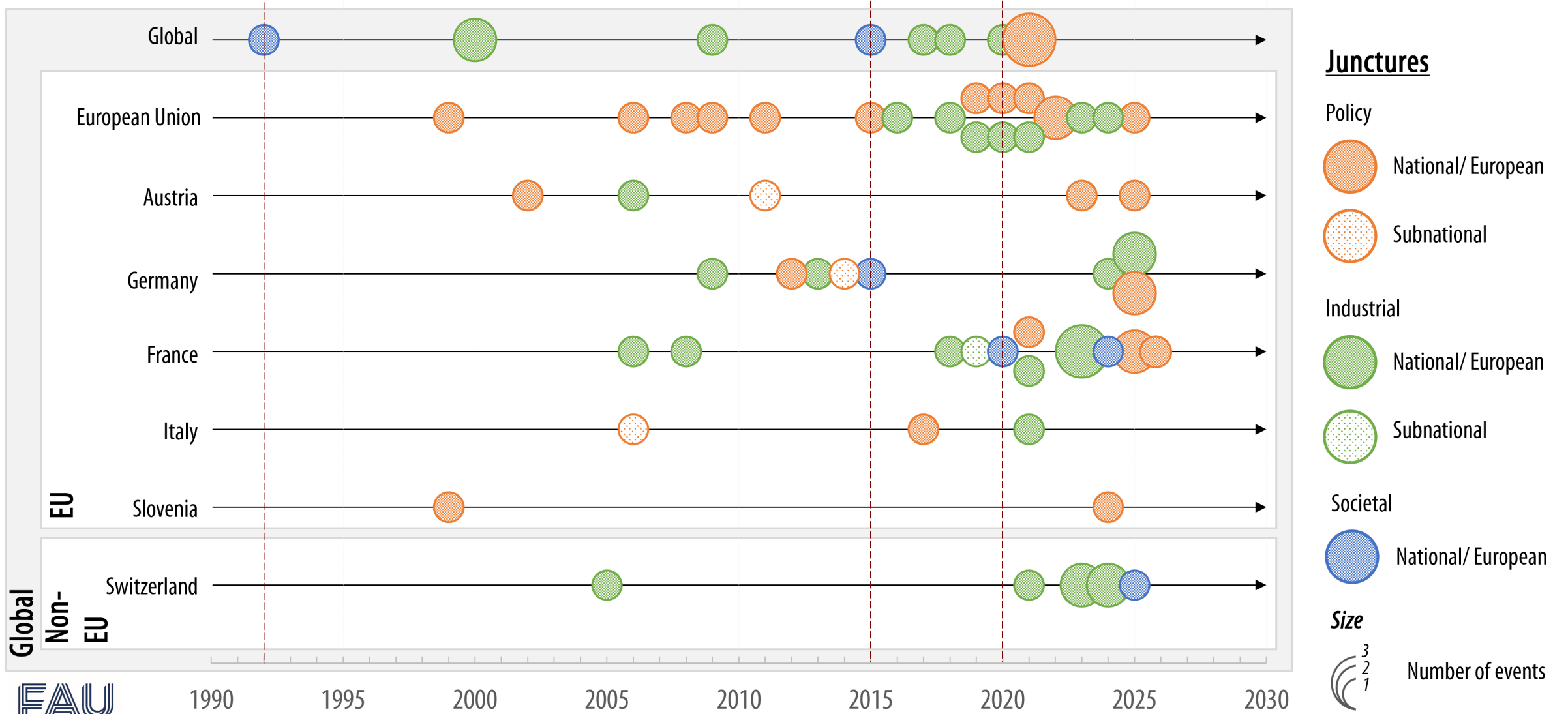
e.g. regulations, policies, regional strategies etc.

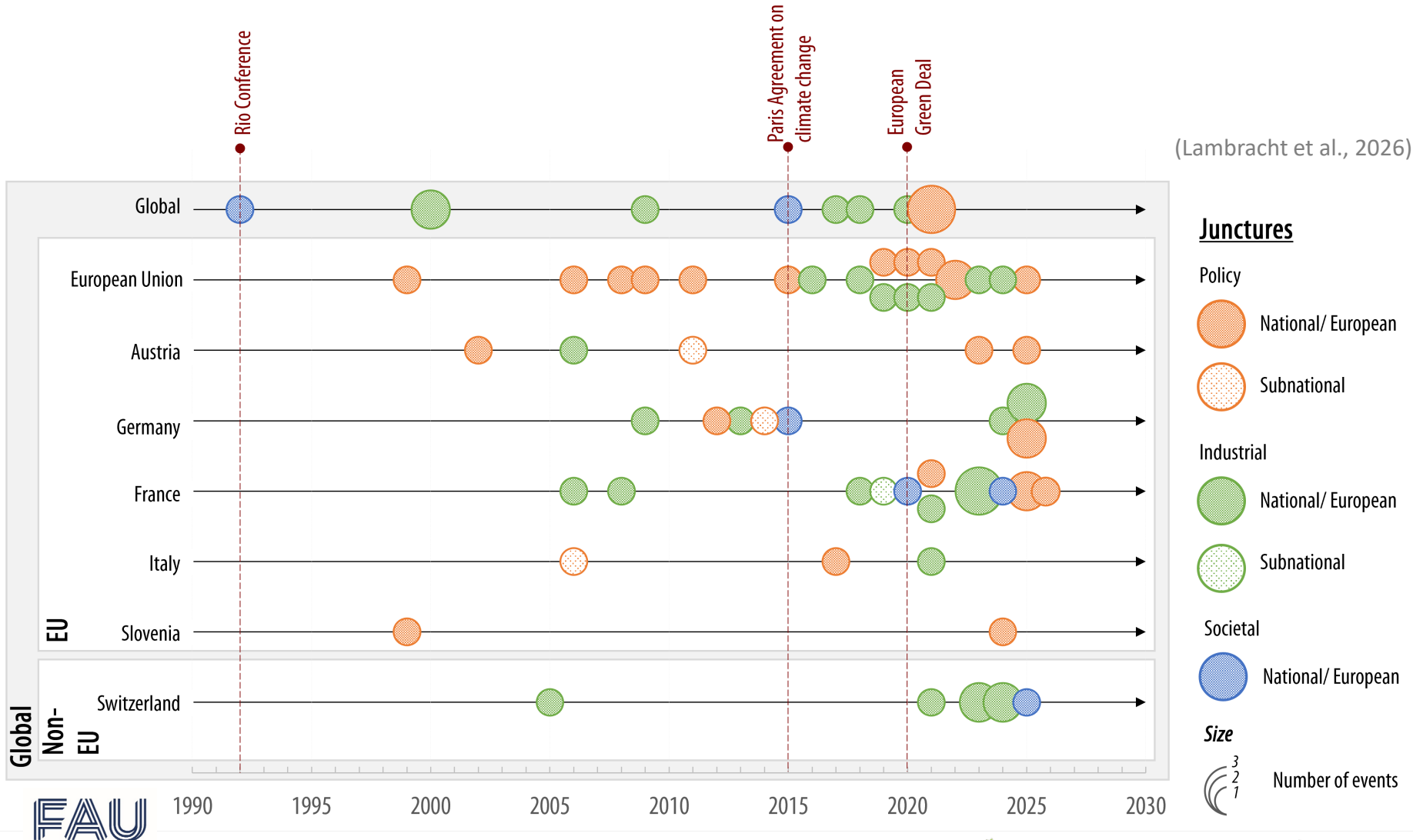


Industry

e.g. technical developments, market opportunities







Global level

- Largely Industrial
- Recent rise since 2015

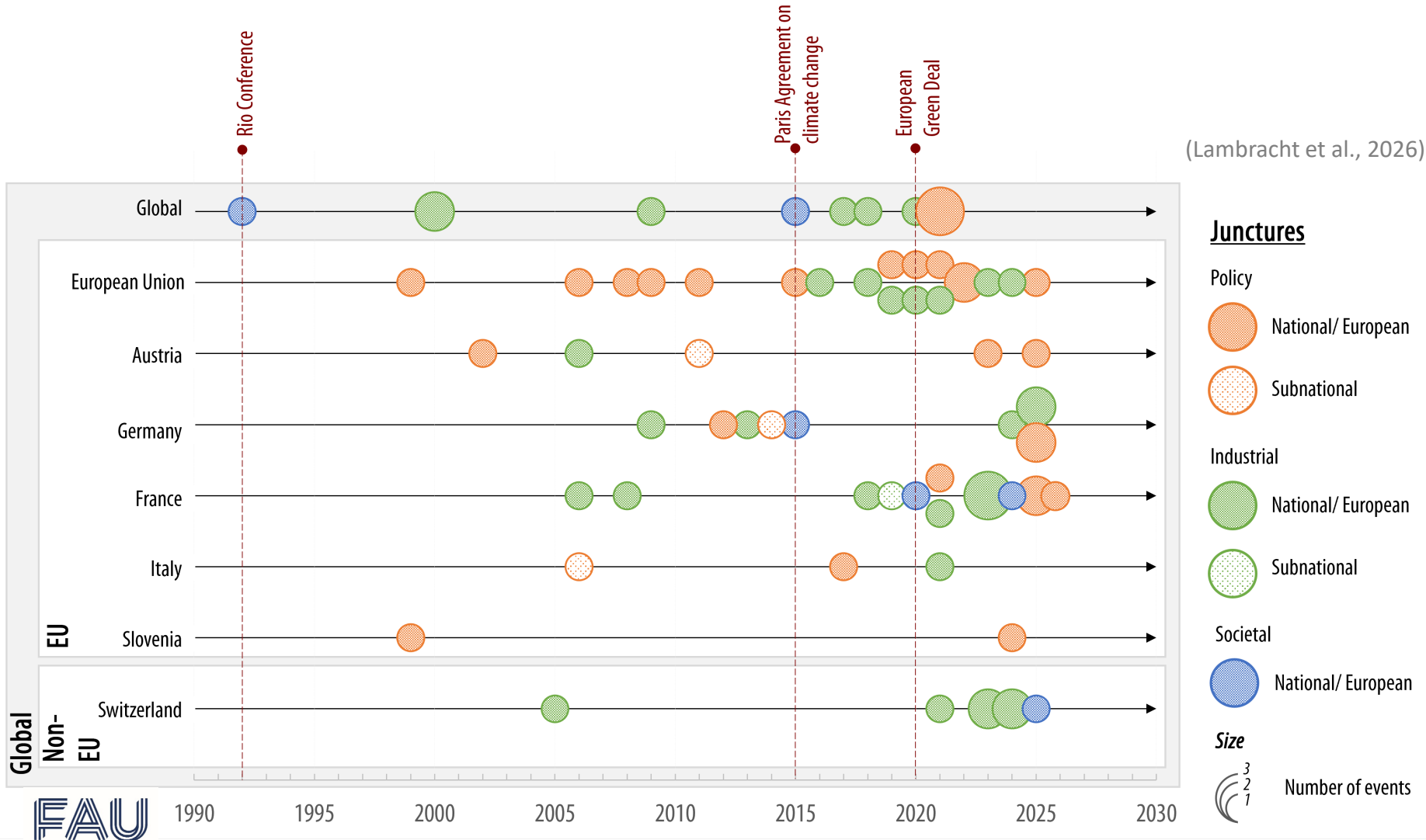
EU Level

- Largely policy-related
- Rising frequency since 1999

Country Level

- Iterative mixture of policy and industry intervention, e.g. Austria, Germany
- Industry ahead of policy, e.g. France, Switzerland
- Policy ahead of Industry, e.g. Italy, Slovenia





Increasing number of activities:

- 1992, 2015, 2020 as major milestones

Regulation vs. industry solutions:

- Industry and policy, seem to affect each other, but the national level development paths differ.

High Impact junctures

- Relevant innovation (policy, industry) happens at very different scales



Take-away messages



INDUSTRY

Upscaling of industry solutions

- Recent R&D generates promising innovations and technical solutions
- These lack an industrial level for upscaling and economic viability
- Interdependencies between regulatory and industrial actors



SOCIETY

Impact of second-hand platforms and fast fashion

- Second hand platforms are currently very successful
- Ecological shifts in consumption patterns vs. affordability issues
- Fast fashion puts a strain on R3 reuse and destabilizes collection systems



POLICY

National implementation differs

- Place-based industrial, policy, and social ecosystems shape the implementation of textile circularity
- Different timings of key policies, industry breakouts and innovation
- National policy affects industry efforts to develop and implement circular economy solutions



Contact



Carola Sommer

Friedrich-Alexander-Universität
Erlangen-Nürnberg
Institute of Geography

carola.sommer@fau.de

Markus Lambracht

Friedrich-Alexander-Universität Erlangen-
Nürnberg
Institute of Geography

markus.lambracht@fau.de

Prof. Dr. Tobias Chilla

Friedrich-Alexander-Universität
Erlangen-Nürnberg
Institute of Geography

tobias.chilla@fau.de



Link to project homepage

Work in progress
benefits from recommendations,
additional information, and criticism.

Please let us know!



Sources

Lambracht, M., Sommer, C. & Chilla, T. (2026). Mapping institutional dynamics in the Alps. WP1 | Mapping the state of Alpine Solutions for circular products, Part 4. Online: <https://www.alpine-space.eu/wp-content/uploads/2026/04/D122-Mapping-institutional-dynamics-in-the-Alps.pdf>

Sommer, C., Paul, H. & Chilla, T. (Under Review). What drives the Change? Critical junctures in the Beeronomics of Bavaria and Czechia. Contemporary Social Sciences.



Thank you !

