

# Australian Surplus Textile Survey Summary Report - 2022

CIRCULAR SOURCING°

Circular Sourcing is a digital platform for buying and selling Australian surplus textiles and designer deadstock fabrics.



# The Problem

1 – Unused pre-consumer textile waste is “hidden waste” amounting to at least 10 million kilograms of fabrics in Australia each year

2 – Materials lay dormant with no use pathway except for landfill due to limited incentives to utilise, sell or donate

3 – Businesses and individuals struggle to source sustainable materials locally in order quantities relevant to their size

4 – Textile based businesses lack the resources to sell/use surplus materials

5 – \$500 million AUD un-tapped value from surplus fabric

6 – New textiles have heavy carbon and water footprints – key areas of reduction focus for Australia

**\$160 billion**

opportunity in surplus materials globally<sup>1</sup>

**>10 million kg<sup>2</sup>**

useable textiles in Australia

**285,000 tonnes<sup>3</sup>**

In CO2 savings for local textile industry

1. Queen of Raw 2020

2. Australian Surplus Textile Survey 2022 + Australian Bureau of Statistics 2017

3. Yan, Yan & Wang, Chenxing & Ding, Ding & Zhang, Yingnan & Wu, Gang & Wang, Lihua & Liu, Xinlei & Du, Chong & Zhang, Yajun & Zhao, Chunli. (2016). Industrial carbon footprint of several typical Chinese textile fabrics. Acta Ecologica Sinica. 36. 119-125. 10.1016/j.chnaes.2015.09.002.



## Our Solution:

A digital platform that connects supply with demand for surplus materials in an online marketplace.

The platform increases textile circulation, decreases reliance on new materials while incentivising and de-risking circular innovation.

Key to our success is simplifying the process for a seller while providing value proposition for a buyer.



In 2022, A.BCH surveyed 150 local textile businesses to establish real-time estimates of Victorian and Australian surplus material volumes.

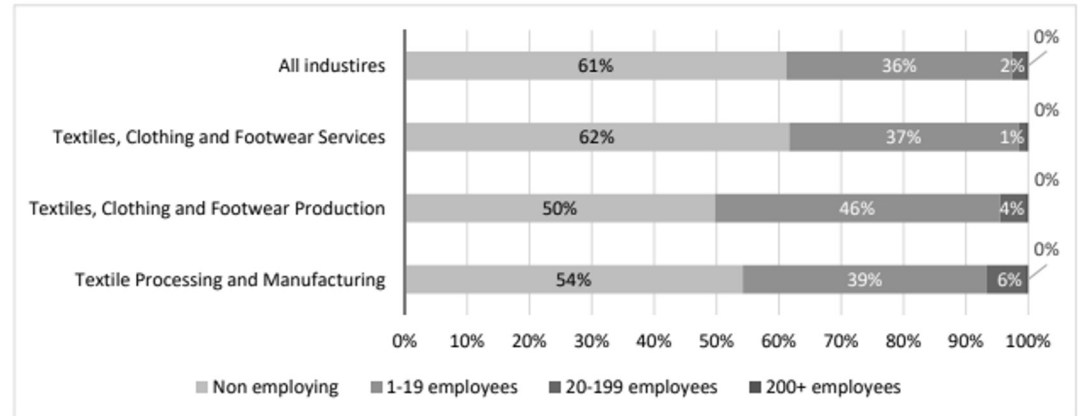
We also wanted to understand the cadence of collecting surplus and well as the types of materials available.

The data points were multiplied to reflect the number of textile business in Victoria. It is worth noting that our survey respondents heavily skewed to Sole Traders, Micro Businesses and End Use (ie. Fashion labels), as such surplus volumes are lower than those of global estimates.

# Business Demographics – Industry Data

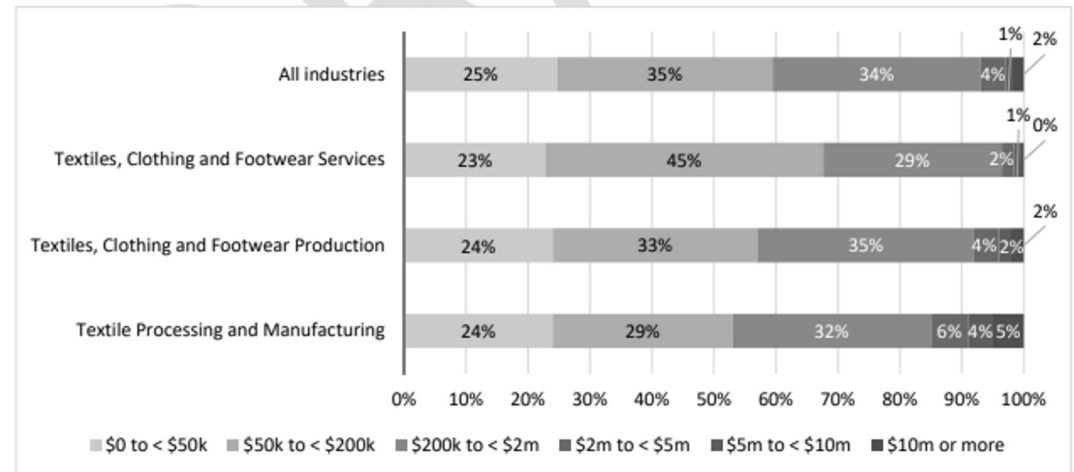
- When compared to the most recent (2017) figures on the Textile Clothing Footwear (TCF) industry, we can ascertain that our survey demographics are not dissimilar to that of the market, heavily skewed to sole traders + micro businesses.
- More work should be done to capture the fabric making/handling sector to give truer (and no doubt higher) representations of surplus volumes.
- This will be a key challenge to overcome in delivering solutions to surplus stock

Figure 2 – Workforce size of TCF businesses, selected industries vs. all industries, 2017



Source: ABS 8165.0 Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017.

Figure 3 – Proportion of TCF businesses by turnover, selected industries vs. all industries, 2017



Source: ABS 8165.0 Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017.

# Business Demographics – Key Survey Findings

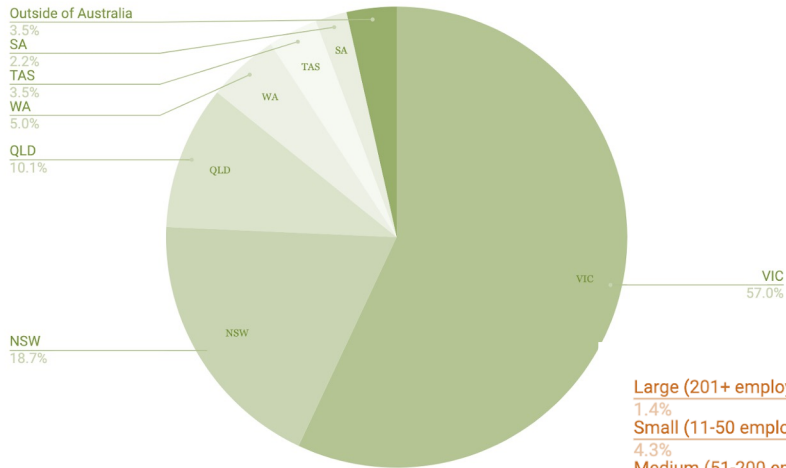


Fig 1: Location of respondents

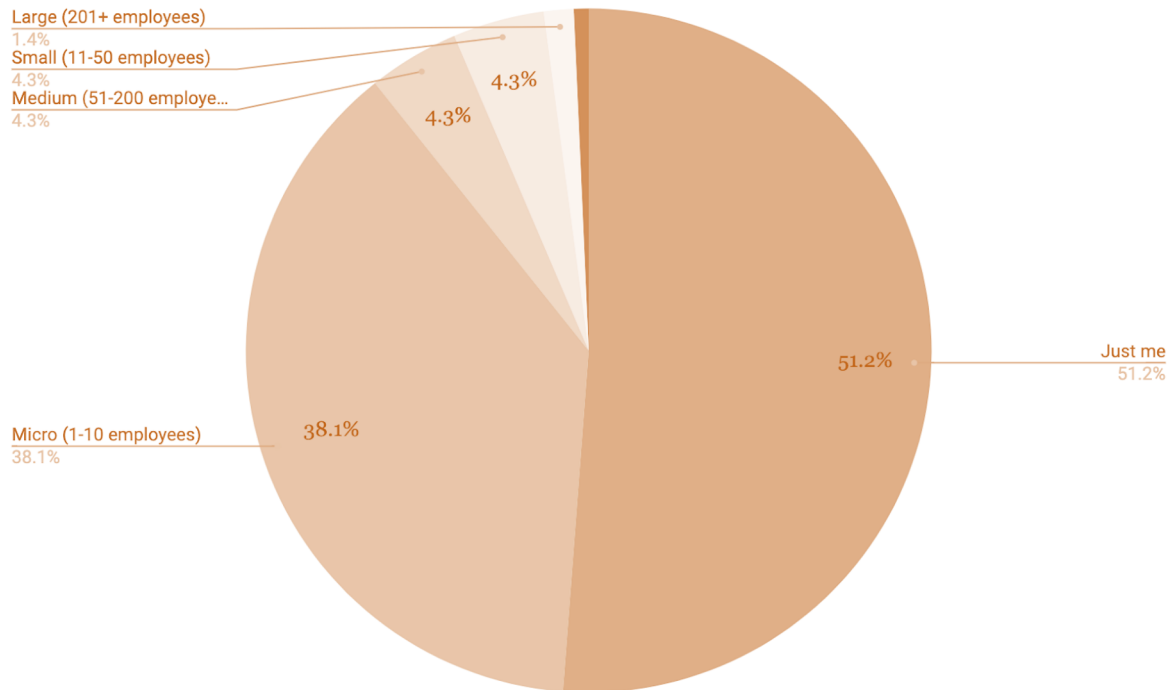


Fig 2: Respondent Businesses Size

# Business Demographics – Key Survey Findings

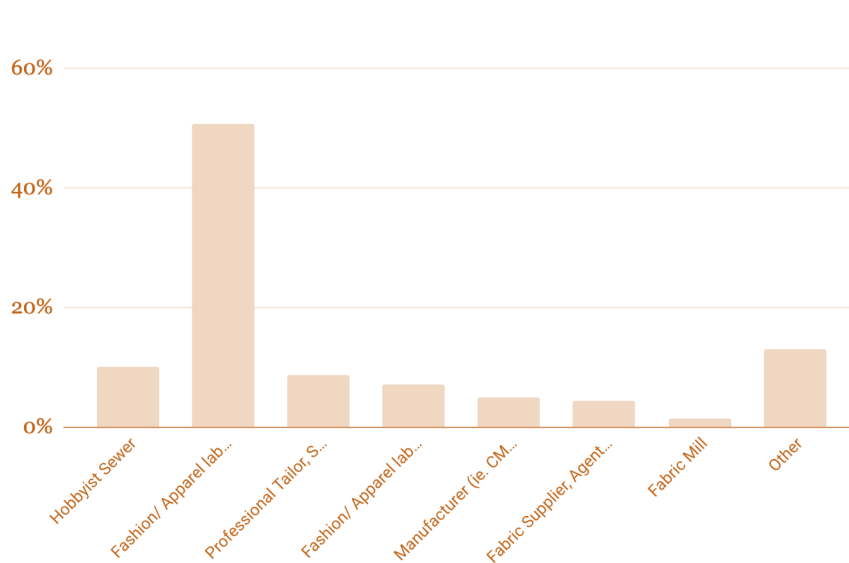


Fig 3: Respondent business types in TCF sector

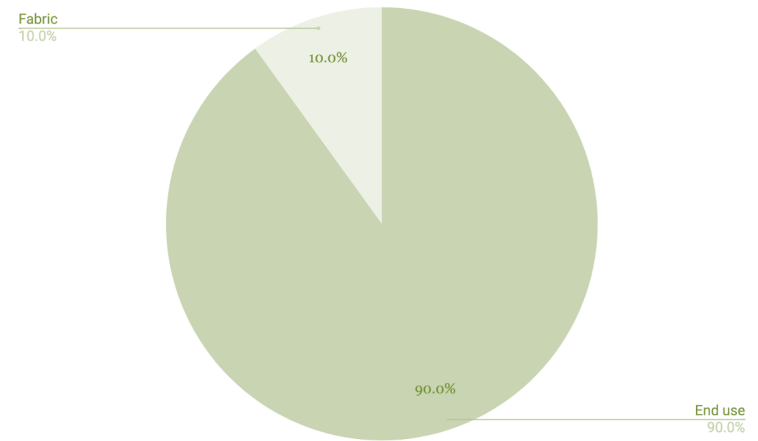
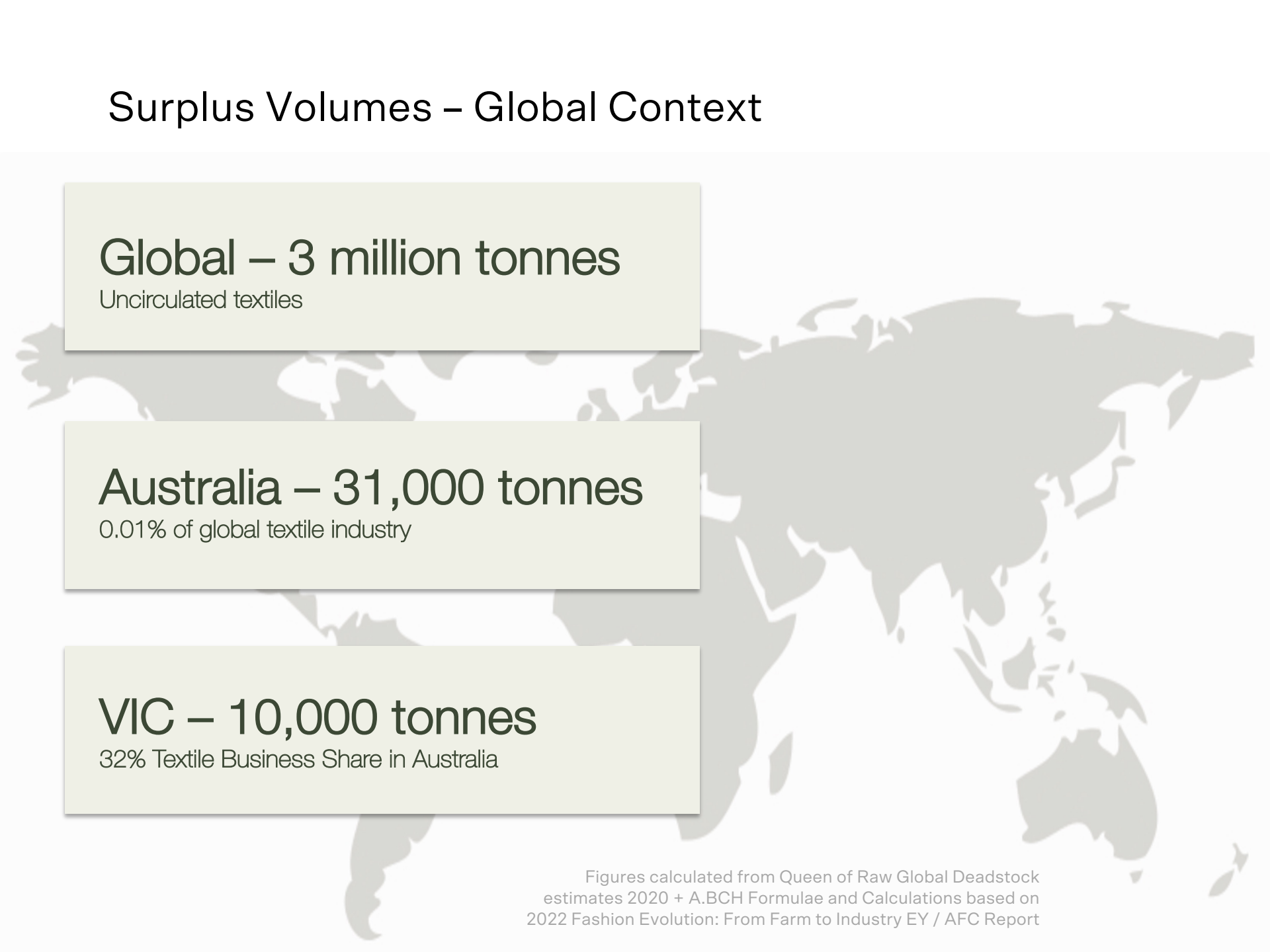


Fig 4: Further to Figure 3, results were combined to see a snapshot of the respondents as they fit into Fabric (makers, handlers, wholesalers etc) and End Use (labels, manufacturers, hobbyists etc)





# Surplus Volumes – Global Context



**Global – 3 million tonnes**

Uncirculated textiles

**Australia – 31,000 tonnes**

0.01% of global textile industry

**VIC – 10,000 tonnes**

32% Textile Business Share in Australia

Figures calculated from Queen of Raw Global Deadstock estimates 2020 + A.BCH Formulae and Calculations based on 2022 Fashion Evolution: From Farm to Industry EY / AFC Report

# Survey Snapshot: how many metres of surplus do businesses currently have?\*

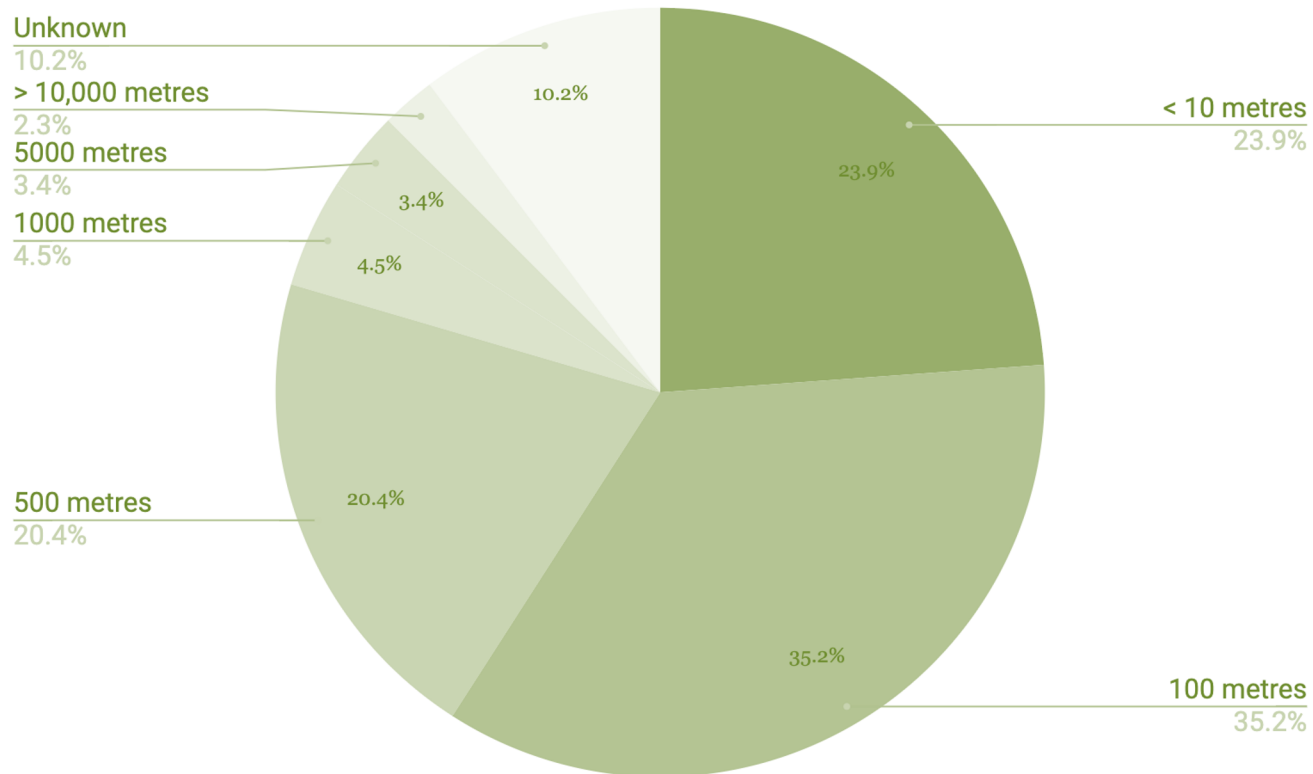


Fig 4: Respondents current estimates of surplus fabric on hand.

\*Survey skews to sole traders + micro business (less than 10 employees) with over 88% respondents identifying as such



# Surplus Volumes – Key Survey Findings

**3 million kg Victoria / 10 million kg Australia**

Conservative estimates of non-circulated surplus textiles each year

**50% of TCF businesses hold approx 500m surplus**

Snapshot data (conservative – VIC). This is equivalent to 175kg + \$10K sales value

**\$500,000 million in textile surplus value**

Additional revenue opportunity in Australia – simply by circulating what's already there

Survey skewed small business with over 88% respondents identifying between sole operators - less than 10 employees.



# Surplus Textile Type – Survey Findings

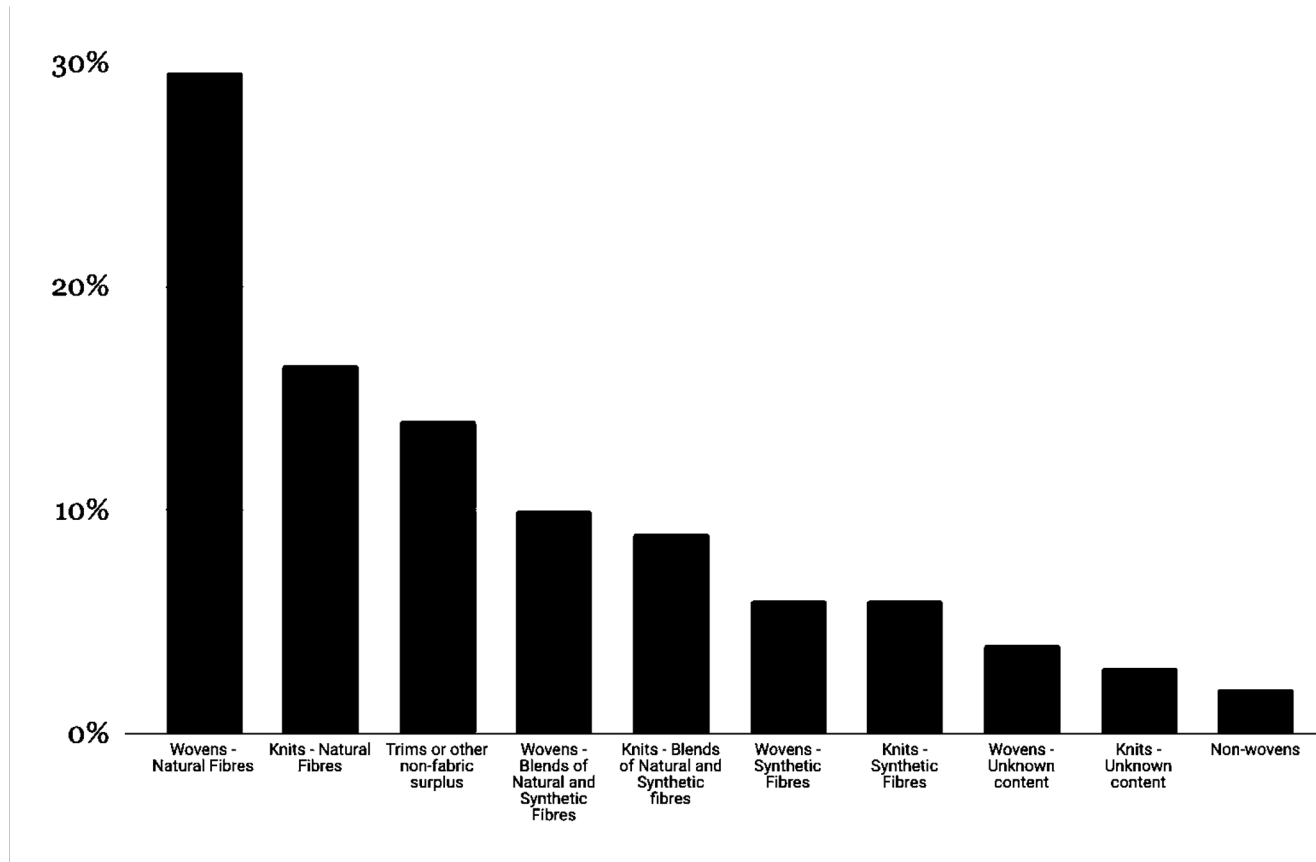


Fig 5: Snapshot surplus materials by fibre and material type. This data indicates a significant proportion (47%) of snapshot materials are natural fibres, which are typically higher quality, lend themselves to sustainability measures and can command a higher price point in apparel.



# Surplus Accumulation Cadence – Survey Findings

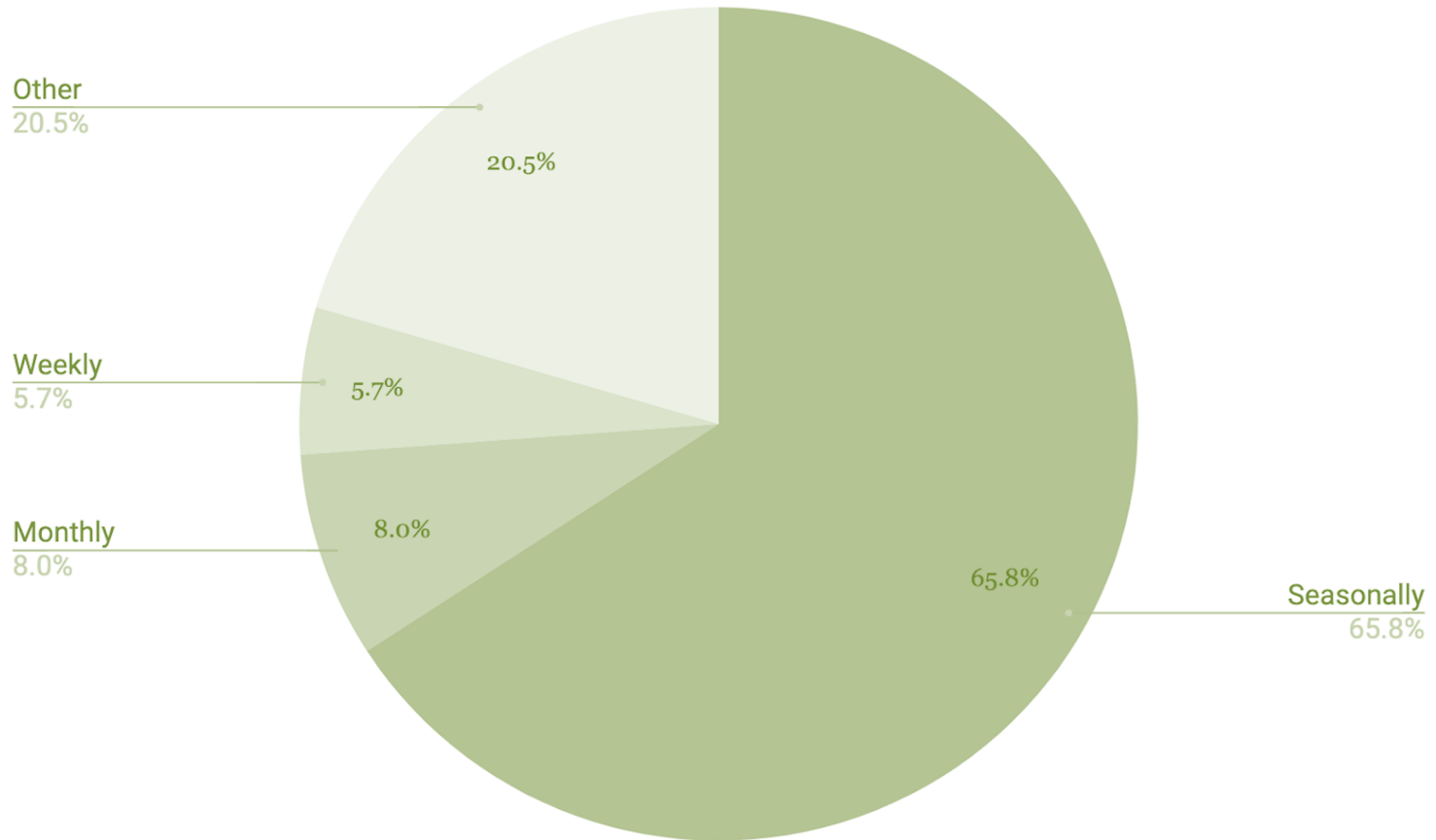


Fig 6: An overview of how often businesses accumulate surplus textiles.  
This data was not used to multiply the snapshot of materials for simplicity sake + to err on a conservative volume estimate



# Current Avenues for Surplus Use – Survey Findings

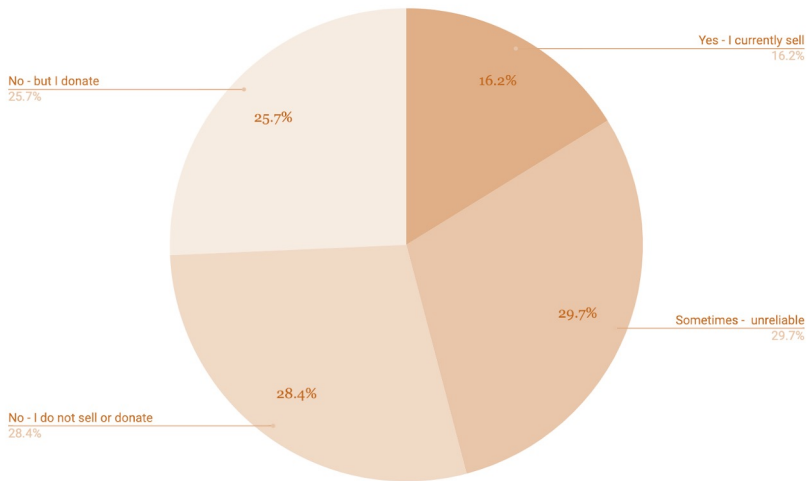


Fig 7: Response to question "Do you currently have a pathway to sell your surplus material?"

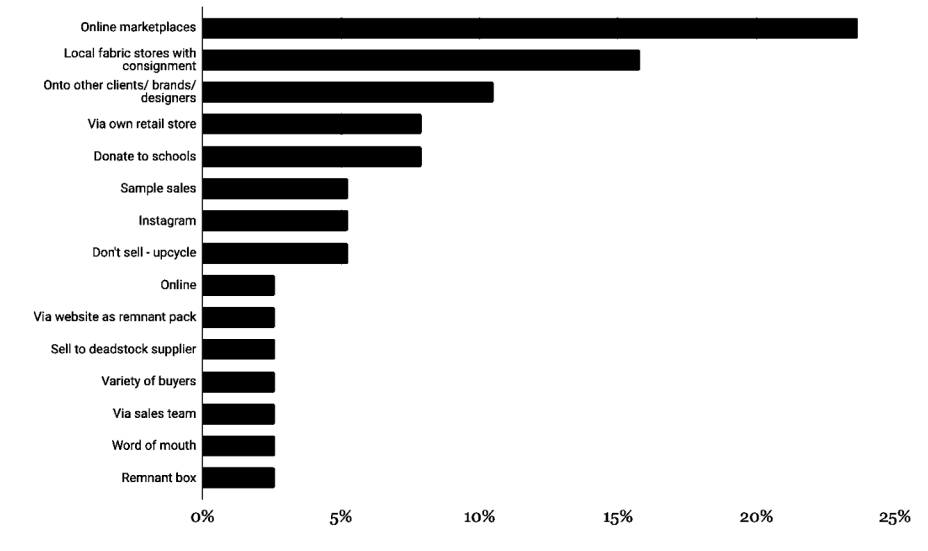


Fig 8: Of the 20% of respondents who currently sell their surplus, these are the pathways they use



# Interest in Selling Surplus – Survey Findings

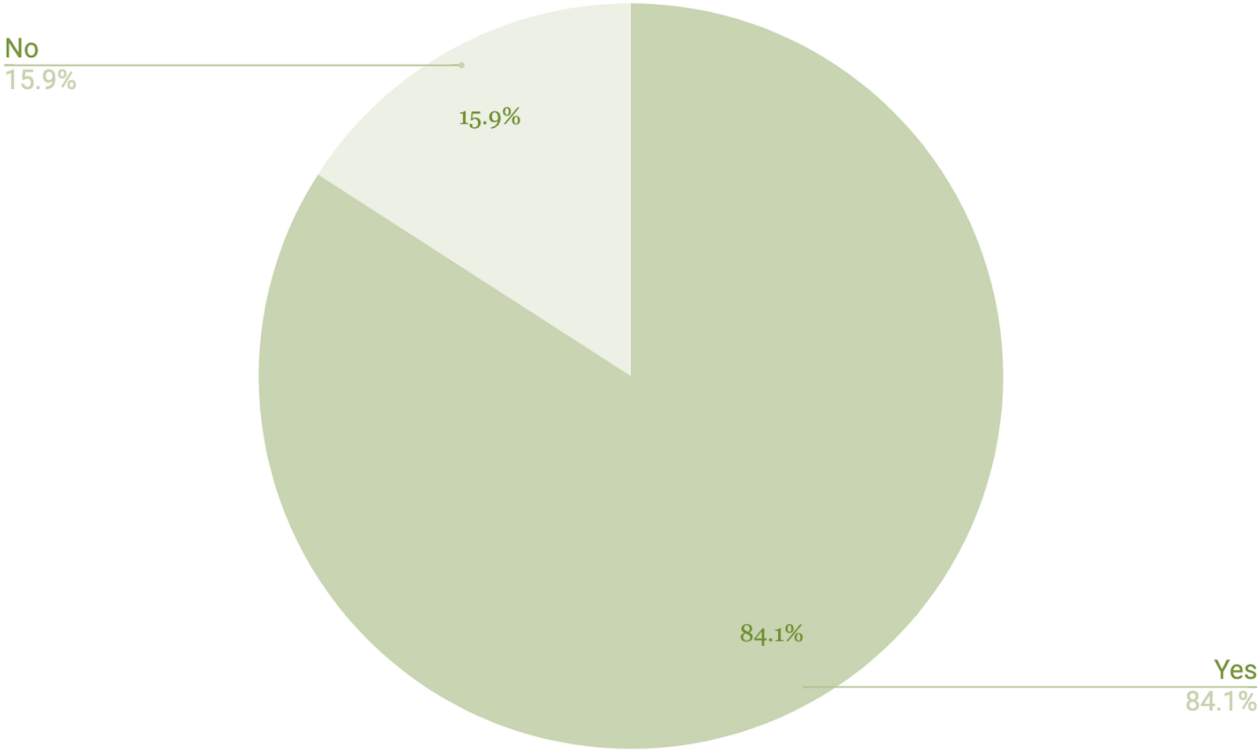


Fig 9: A majority (84%) of survey respondents are interested in selling their surplus materials.



## Key Findings:

- Surplus materials frequently go unmeasured from a volume and value perspective. A conservative estimate is that 10 million kg of usable surplus sits dormant and unused in warehouses across Australia.
- This equates to a snapshot of around \$500 million in unrealised value for a sector made up of a majority of small businesses (under \$2 million revenue).
- Nearly 50% of currently existing surplus material are natural fibres (across woven and knitted materials).
- There is a strong appetite to move (sell) these materials back into the system for new end-uses.





## Background Information – Our Team



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