

Designing Climate-Compatible Industrial Strategies for South Africa: The Textiles Value Chain

South African policy makers and clothing, textiles, leather and footwear manufacturing sector stakeholders face rising pressure to proactively engage and develop a coherent strategy to create an enabling environment to shift to a circular economy, or they will fall behind global net zero greenhouse gas emission targets.

This emerged as a key message from a report entitled “Designing Climate-Compatible Industrial Strategies for South Africa: The Textiles Value Chain” which was compiled by Trade & Industrial Policy Strategies (TIPS) and Pinpoint Sustainability. It was funded by the Department of Trade, Industry and Competition (the dtic) to assist the government and stakeholders in thinking through a climate-compatible strategy which would drive growth and employment in the value chain.

The authors, Dr Nicola Jenkin from Pinpoint Sustainability and TIPS Sustainability Researcher Elize Hattingh, argue that the clothing and textile sector will need to collaborate and agree on mitigation targets and align efforts to implement a decarbonisation strategy, in view of global targets to reduce greenhouse gas emissions to net zero by 2050. The development of such a strategy provides an opportunity for new market development and a risk management strategy to maintain the South African economy’s competitiveness and access to existing markets and financing.

Shifting towards a low-carbon model of development has implications in terms of what is produced as well as how it is produced. It implies two complementary streams, which go hand in hand, namely the development of new, green industries on the one hand (notably to replace industries which may be progressively phased out), and the greening of existing, traditional industries on the other. In addition, given the current energy constraints and need to reduce carbon emissions, improving energy efficiency and reducing energy consumption in the manufacturing processes of this value chain are also a key finding of the report.

This requires the design of climate-compatible industrial development strategies for key value chains in the country. The textile value chain is one such value chain. Moving towards sustainable and circular textiles would require a holistic approach and changes at each stage in the value chain, involving players of all sizes and from all market segments. New business models would have to be adopted on a widespread scale, the use of hazardous substances in textile processing would have to be eliminated, and resources would have to be used much more effectively, including a shift away from fossil fuels towards renewable sources of energy and materials. But, most of all, textile utilisation would have to be optimised, including a longer service life and more post-use options, along with drastically improved recycling of materials when products reach their end-of-life.

The research study delves into the environmental sustainability of South Africa's textile value chain, with a focus on the manufacturing components, and proposes a set of interventions to set South Africa's textiles value chain on a climate-compatible and sustainable pathway. These mitigation options focus on the manufacturing component of the value chain, or interventions that will directly impact and enhance manufacturing operations in the country.

These include:

- Reducing the use of hazardous chemicals and improving water management;
- Optimising manufacturing energy efficiency and consumption;
- Fostering fibre-to-fibre recycling;
- Reducing single-use sanitary wear;
- Adopting clothing and footwear leasing models; and
- Increasing the second-hand clothing market.

These interventions are currently being explored with key stakeholders and, ultimately, if adopted, would form part of the Retail-Clothing, Textile, Footwear and Leather (R-CTFL) Master Plan.

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