



celebrating 30 years of sustainable style

the Sustainable Fiber Gap

an Heubrandner
Global Textiles Business, Lenzing
Istanbul, October 5th, 2022



Lenzing at a glance

Global leader of **Wood Based Cellulose Fibers**

million tons of capacity

- Lenzing ECOVERO™
- TENCEL™ Modal
- TENCEL™ Lyocell

Global production footprint
(Europe, USA, Asia)

Sustainability leader

- Science Based Target
- CDP Triple-A
- Canopy Green Shirt
- HIGG-Index

[tencel.com](https://www.tencel.com)
is a trademark of Lenzing AG



The world uses quite a lot of fiber ...

113
million
tons



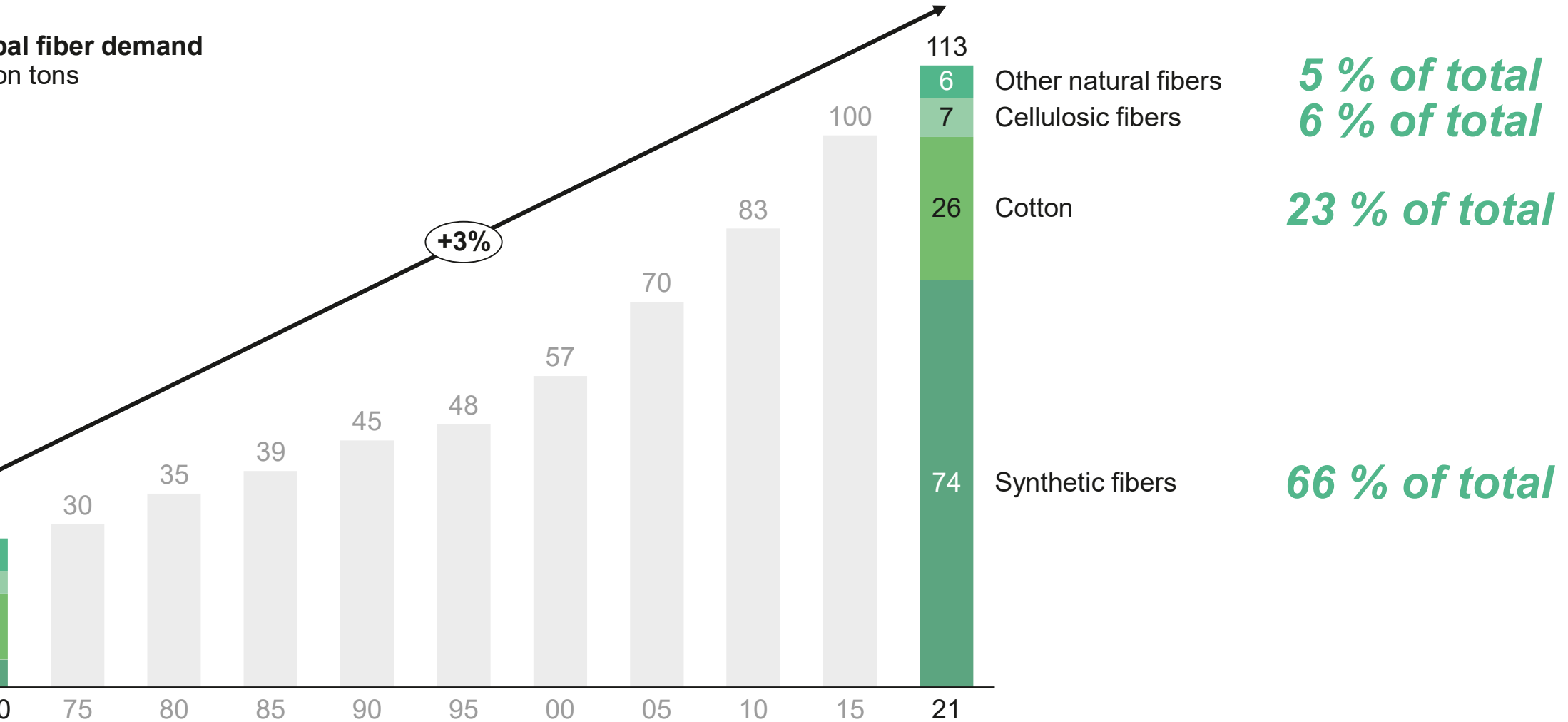
Weight of **2,2 billion** People



How did we get here?

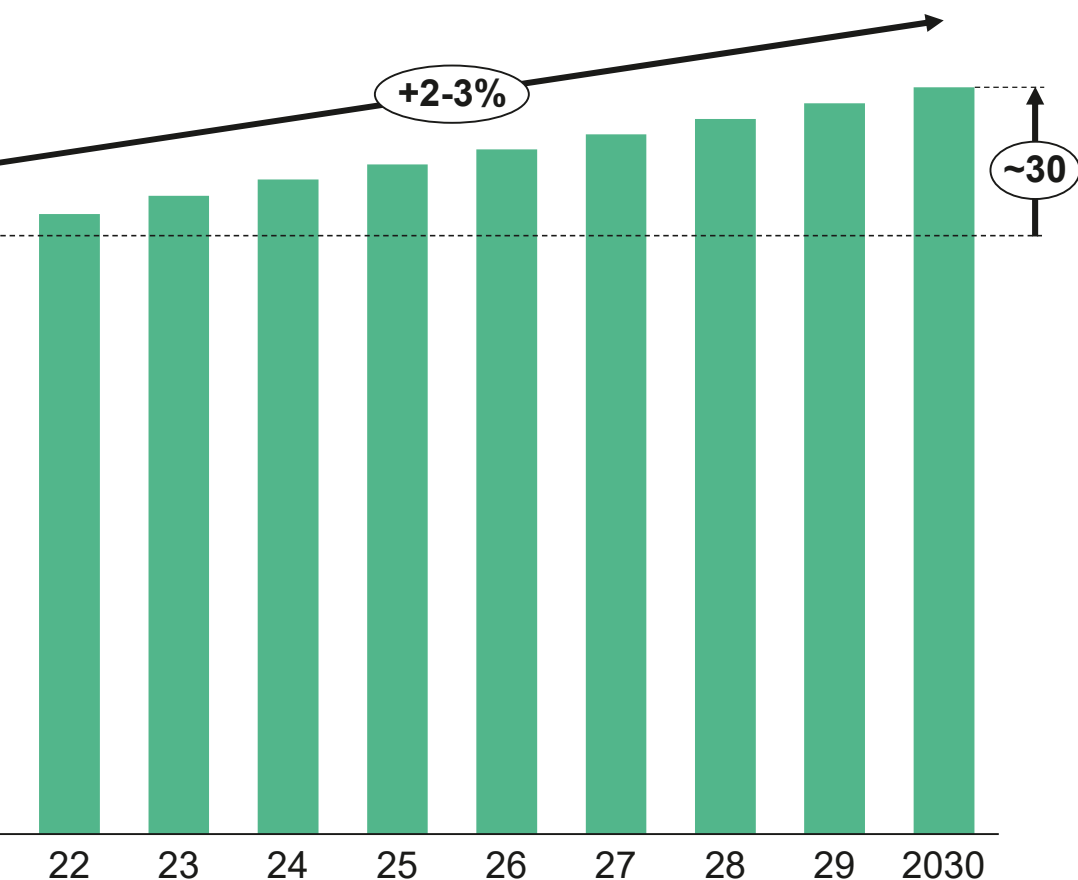


Global fiber demand
in million tons



growing at 2-3 % p.a., the world is
expected to consume ~30 million tons of
fibers more per year by 2030

Global fiber demand forecast
in million tons, percent CAGR



NOT EXHAUSTIVE

- Population
- Middle class households
- Underlying apparel and nonwovens market
- More conscious spending
- Longer product lives / reusable products

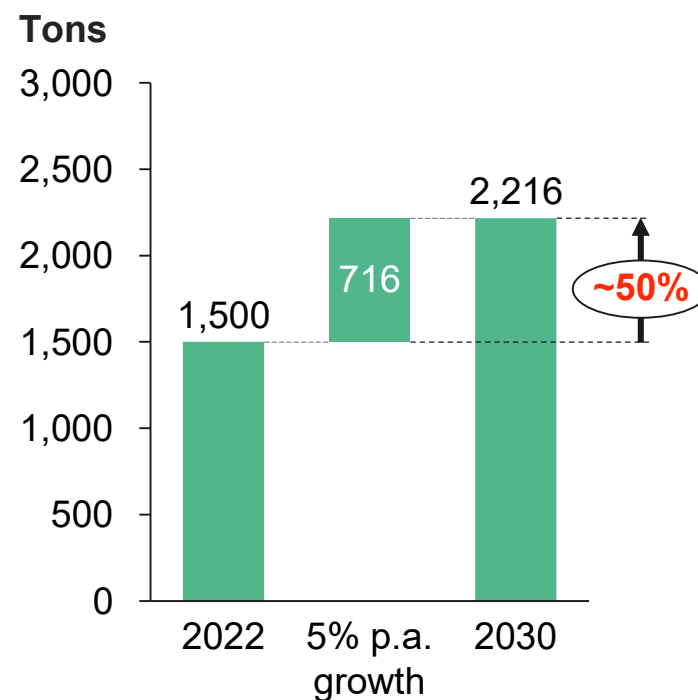
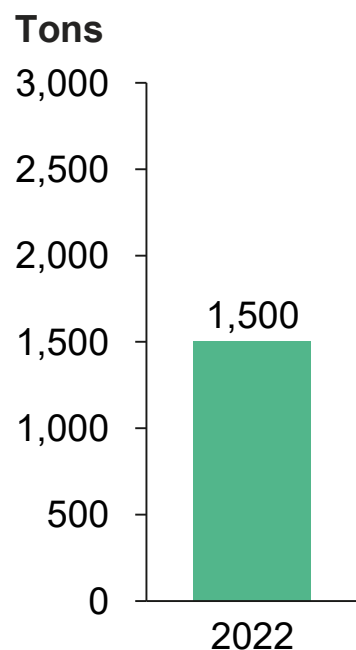
What does this mean for a Brand & Retail company? – Illustrative Example



5% volume growth p.a.

Avg. product weight (kg): **0.300**
Products sold (m): **5.0**
Fiber requirement (tons): **1,500**

Avg. product weight (kg): **0.300**
Products sold (m): **7.4**
Fiber requirement (tons): **2,216**



*What
kind of
fibers do
we need?*



Performance

Sustainable

Biodegradable

Circular

Affordable

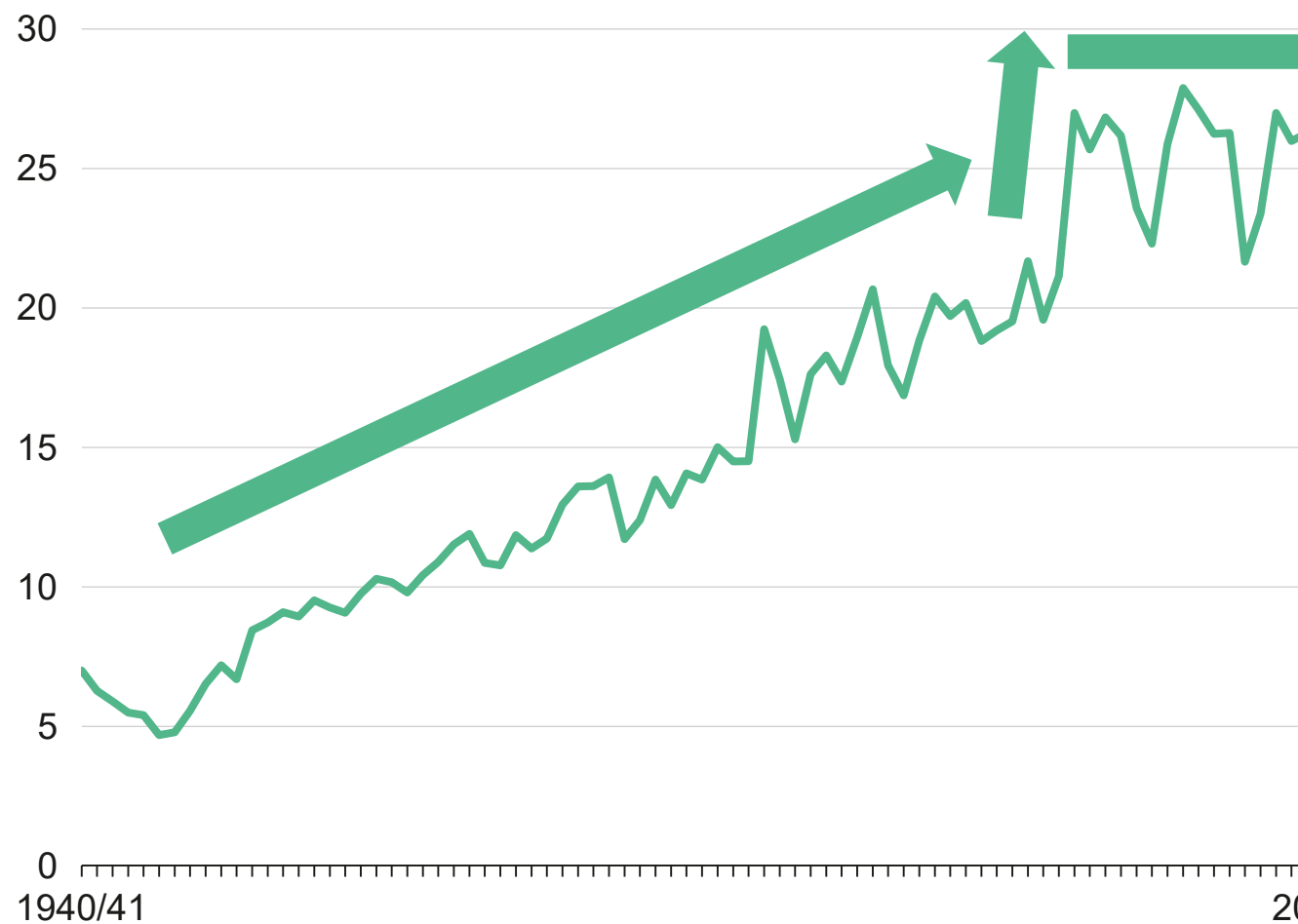
Stable prices

Availability

Not all fibers will be easily available



Cotton harvest
Million tons per season



Consumers look for
more sustainable
brands



"The amount of **waste** in the garment industry drives me mad"

"What does it really take for something to be **labelled** sustainable?"



"I **wouldn't have a clue** about how to tell if it's sustainable"

"Sustainability in clothing is **intransparent**. That's why I simply trust in sustainable brands"



ers will have to
support Circularity



"73 % landfilled or incinerated. Less than 1%
of material ... recycled into new clothing."

– *Ellen Macarthur Foundation*

"By 2030 textile products placed on the EU market
are long-lived and **recyclable**, to a great extent
made of recycled fibres, (...) driven by sufficient
**capacities for innovative fibre-to-fibre
recycling ...**"

– *EU Strategy for Sustainable and Circular
Textiles, March 30, 2022*

When the current
crisis is over...

A gap of 30 million
tons of fibers needs to
be filled by 2030.

What will your fiber
mix look like?

