亚洲开发银行技术援助项目
ADB Loan TA Project

废旧纺织品高值资源化利用的探索与实践
Exploration and Practice of High-value Resource Utilization of Waste Textiles

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1.废旧纺织品回收现状
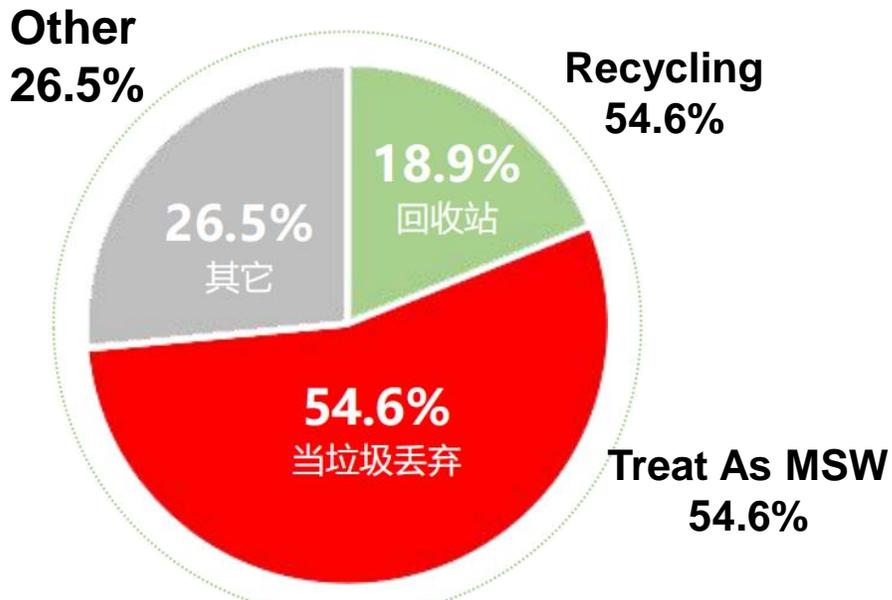## THE STATUS QUO OF WASTE TEXTILE RECYCLING

➢ 居民废旧衣物何去何从
How to deal with residents' waste clothes

中国是世界服装的重要设计中心、是目前世界上最大的服装生产国和消费国

China is an important design center of clothing in the world, and is the largest clothing producer and consumer in the world at present.

近几年快消品牌的快速崛起和服装的可穿性下降，引发了极大的浪费

In recent years, the rapid rise of fast-moving consumer brands and the decline in wearability of clothing have caused great waste.

据调查显示，只有 18.9%的居民将旧衣物作为废品去到回收站，有54.6%的居民将旧衣物作为生活垃圾直接丢弃，使之成为固体废弃物。这样既浪费资源又污染环境。 在世界各地，每年有大量的旧衣物送至垃圾场被 焚烧或填埋，污染着空气和土壤。

According to the survey, only 18.9% of residents take old clothes as waste to the recycling station, and 54.6% of residents discard old clothes directly as MSW, making them solid waste. This wastes resources and pollutes the environment. Around the world, large number of waste clothes are burned or buried every year, polluting the air and soil.

Other
26.5%

Recycling
54.6%

Treat As MSW
54.6%

1.废旧纺织品回收现状
THE STATUS QUO OF WASTE TEXTILE RECYCLING

➢ **居民废旧衣物何去何从**
How to deal with residents' waste clothes

居民废旧衣物何去何从
How to dispose waste textile

You may not know
您可能不知道的

您最常见的
The most common

堆积如山！

黑心棉作坊！

社区回收箱

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"四分法"的分类体系
Classification system of "quartering method"

将垃圾分为厨余垃圾（餐厨垃圾）、可回收物、有害垃圾和其他垃圾，其中将可回收物细分为**再生资源**和**低值可回收物**。

The waste is divided into kitchen waste (food waste), recyclables, hazardous wastes and other wastes, among which recyclables are subdivided into renewable resources and low-value recyclables.

✓ **再生资源类：废纸、废塑料、金属等**
  Renewable resources: waste paper, waste plastic, metal, etc.

✓ **低值可回收物类：废旧纺织品、废玻璃、废软包装材料等**
  Low-value recyclables: waste textiles, waste glass, waste flexible packaging materials, etc.

低值可回收物是具备一点循环利用价值，在垃圾投放过程中容易混入其它类生活垃圾，单纯依靠市场调节难以有效回收处理，需要经过规模化回收处理才能够获得循环使用价值的低价值可回收物。

Low-value recyclables have a little recycling value, and are easily mixed with other types of MSW during the waste placing process. It is difficult to effectively recycle and disposal only by market regulation. It requires large-scale recycling to obtain low-value recyclables with recycling value.
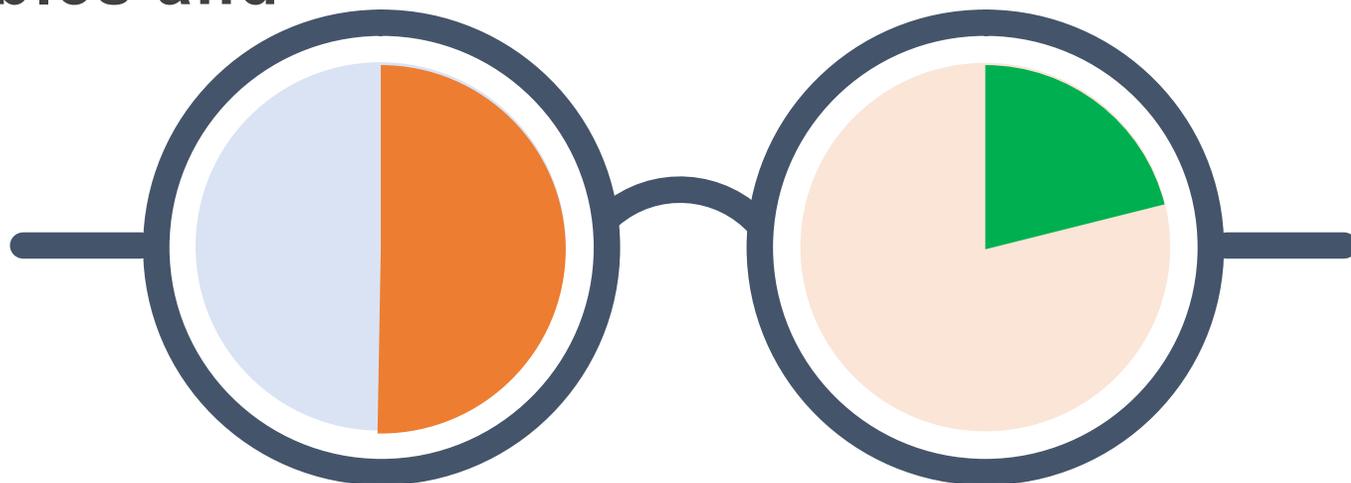
低值可回收物占比和废纺占比
Percentage of low-value recyclables and waste textiles

☑ 废旧纺织品必须有出路
Waste textiles must be disposed of

☑ 政府补贴不持久
Waste textiles must be disposed of

50%

废旧纺织品在废旧纺织品在低值中占比
Percentage of waste textiles in low-value recyclables

20%

低值物在再生资源中占比
Percentage of low-value recyclables in renewable resources

1.废旧纺织品回收现状
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处理方式
Disposal method

将可用于再生的棉毛、棉纶、涤纶类等旧衣物交给再生工厂，通过物理和化学方法进行开松、梳理、热粘合或针刺等操作，加工成农业保温材料、建筑和工业隔音材料、填充材料等，或制成再生纤维、聚酯原料、再生棉帆布重新用于纺织品生产。
Hand over old clothing such as cotton wool, cotton, polyester, etc. that can be used for regeneration to the recycling factory, and use physical and chemical methods for opening, carding, thermal bonding or needle punching, and processing into agricultural insulation materials, construction and industrial sound insulation materials, filling materials, etc., or made into recycled fibers, polyester raw materials, recycled cotton canvas and reused in textile production.

65%

将符合捐赠标准的衣服（较新、质量较好、较干净，一般为小孩子冬装）进行清洗、消毒后捐赠到有需要的贫困山区或者公益组织及个人。
The clothes that meet the donation standards (newer, better quality, cleaner, generally children's winter clothes) will be washed, disinfected and donated to impoverished mountainous areas or non-profit organizations and individuals in need.

15%

将较新、质量较好的夏装经过清洗、消毒，交给相关的外贸公司出口到非洲、东南亚等一些贫困国家或者战乱国家。
The newer and better-quality summer clothes will be cleaned and disinfected and delivered to relevant foreign trade companies for export to some impoverished or war-torn countries such as Africa and Southeast Asia

20%

1.废旧纺织品回收现状
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- 据统计，每年我国有约2600万吨的衣物被扔掉，再利用率不到10%，相当于扔掉了大半个"大庆油田"。

  According to statistics, about 26 million tons of clothes are discarded every year in China, and the reuse rate is less than 10%, which is equivalent to wasting more than half of Daqing Oilfield.

- 年处理5万吨废旧纺织品，可年节水300万吨，年减少CO2排放18万吨，年节约农药1万吨、化肥1.5万吨（国际回收局 BIR数据）。（口述：南方和北方的分类旧衣服价格分别是2400和800元/吨，主要原因是出口第三世界欠发达国家导致，像废塑料一样，真正的出路是在国内解决其高值利用问题，白色汽车隔音棉是一个选择）

  The annual processing of 50,000 tons of waste textiles can save 3 million tons of water, reduce CO2 emissions by 180,000 tons, and save 10,000 tons of pesticides and 15,000 tons of chemical fertilizers (International Recycling Bureau BIR data). (Oral statement: The prices of classified used clothes in the South and North are RMB 2,400 and RMB 800/ton, respectively. The main reason is that they are exported to underdeveloped countries in the third world. Like waste plastics, the effective way is to solve the problem of high-value utilization in China. White car soundproof cotton is an option)

3.思考与建议
Conclusions and suggestions

1. 梯级利用是行业发展的必由之路，高值化是必然选择。

Cascade utilization is the only way for industry development, and high value is the inevitable choice.

2. 呼吁修订2015年国家税务总局"78号文"增值税即征即退50%税收优惠的条件，根据行业实际调低原料比例的要求。

It is called for revising the tax preferential condition of 50% refund of VAT in 2015 "No.78 Document" of the State Administration of Taxation of China, and reducing the proportion of raw materials according to the actual situation of the industry.

3. 整顿市场，保护正规企业利益提供公平、干净的市场环境，对合格、优秀企业进行政策倾斜。

Rectify the market, protect the interests of formal enterprises, provide a fair and clean market environment, and give policy preference to qualified and excellent enterprises.

4. 产业链协同发展需要平台支撑。

The coordinated development of the industrial chain requires platform support.

5. 有人才有可能。

Anything is possible with people.

THANKS!