

debrand

BASECAMP SUMMIT

INSIGHTS SUMMARY REPORT 2025

CATALYZING COLLECTIVE ACTION

The inaugural Basecamp Summit brought together a bold group of industry leaders, change-makers, and key decision-makers, all united by the ambitious goal of accelerating collaboration and catalyzing collective action toward a truly circular textile economy in North America.

From global brands and innovative recyclers to policy advocates and logistics providers, attendees brought diverse expertise and a shared commitment to driving meaningful, scalable change. Together, they laid the groundwork for a more connected, resilient, and sustainable apparel ecosystem.

The connections forged and insights exchanged at the Summit revealed clear, cross-cutting themes: common challenges, shared opportunities, and a collective desire to break silos. This report distills those foundational takeaways, offering a roadmap for all stakeholders in fashion, apparel, and textiles to bridge gaps, co-create solutions, and move the industry forward together.

COMMON THEMES

Within these six pillars, we uncovered interconnected barriers and opportunities that span across disciplines, highlighting the need for deeper, cross-functional collaboration to unlock scalable solutions.

- 1 THE IMPORTANCE OF PRE-COMPETITION
- 2 MISALIGNED INCENTIVES AND ECONOMIC VIABILITY
- 3 C-SUITE AND CONSUMER BUY-IN GAPS
- 4 UNDERDEVELOPED INFRASTRUCTURES
- 5 MATERIAL ACCESS AND FEEDSTOCK LIMITATIONS
- 6 STAKEHOLDER COLLABORATION FOR EFFECTIVE POLICY
- 7 TRANSPARENCY FATIGUE AND GREENWASHING RISKS

1

THE IMPORTANCE OF PRE-COMPETITION

The fashion industry's DNA is rooted in competition and differentiation, yet circularity requires unprecedented collaboration, especially pre-competitively.

GUIDING QUESTIONS:

- What do we lose by keeping this process or information siloed?
- How could a shared system reduce duplication, cost, or inefficiencies across the board?
- Who is missing from the conversation—and what would it take to bring them in?

PRE-COMPETITIVE ALLIANCES

Cross-brand or cross-supplier partnerships that focus on upstream alignment, infrastructure sharing, or standard setting without threatening competitive market advantages. Circularity won't be able to scale if players protect their piece of the puzzle rather than enabling shared progress for the greater ecosystem.

For brands, this might look like pooling materials (e.g., sorted pre- and post-consumer textiles) to meet recycler minimum volumes to enable textile-to-textile pilot feasibility. For recyclers and solution providers, this might look like creating interoperable systems or shared repositories to direct garments to the best next-life solution, even if the solution partner is technically a "competitor."

NEUTRAL ENABLERS

Neutral third-party ecosystem players play a vital role as connectors, data aggregators, and infrastructure enablers. These actors can bridge gaps between stakeholders without being tied to any single commercial interest.

For example, not-for-profit organizations can offer pre-competitive opportunities for multi-brand collaboration and participation in larger industry initiatives. Sortation partners can serve as impartial nodes, aggregating and redirecting materials based on next-best outcomes rather than brand-specific goals. Trade organizations can lead shared research initiatives and drive industry-wide standardization, including technology adoption. Government and policy advocates can represent industry needs and champion enabling conditions on behalf of brands and organizations.

Neutral players are essential for building trust, coordinating industry-wide frameworks to support pre-competitive risk mitigation for brands

MISALIGNED INCENTIVES AND ECONOMIC VIABILITY

A disconnect between change drivers and decision-makers, coupled with misaligned incentives across leadership, supply chains, and finance, continues to undermine the economic viability of circular solutions—despite growing urgency around sustainability.

GUIDING QUESTIONS:

- How might investment in circular infrastructure today serve as insurance against future volatility?
- Where could brands and solution providers across reuse and recycling co-develop scalable ROI frameworks?
- Are there ways to create cost-sharing agreements across the value chain?

CIRCULARITY DRIVING SUPPLY CHAIN DERISKING

The fragility of global supply chains—exposed by disruptions like pandemics, political unrest, and climate-related disasters—has prompted new thinking about risk. Circular systems that prioritize local recovery, reprocessing, and reuse of materials offer a pathway to more predictable, controllable, and traceable supply chains that can lead to longer-term stability.

SHARED ECONOMIC MODELS

Transitioning to circular systems often requires upfront investment, coordination, and experimentation—costs that can be prohibitive for smaller players or early adopters. Shared economic models like pooled LCA studies, off-take agreements for recycled materials, or co-investment in logistics infrastructure, can distribute costs that would otherwise be too capital-intensive or inefficient to build alone.

SHORT-TERM METRICS VS. LONG-TERM VALUE

Companies are often driven by quarterly performance targets, prioritizing profit margins, revenue growth, and shareholder returns. In contrast, sustainability initiatives typically generate value over longer time horizons, through benefits like supply chain resilience, brand trust, and reduced regulatory risk.

This misalignment perpetuates underinvestment in future-oriented systems, such as industry-wide reporting standards or emerging technologies. How can we evolve incentive structures to reward long-term thinking? What will a brand's health look like a decade from now if it fails to invest in circularity today? By redefining returns on investment and the corresponding time frames, we can in turn encourage truly economically valuable solutions.

3

C-SUITE & CONSUMER BUY-IN GAPS

Despite broad support for sustainability and circularity, cost and risk concerns often stall action. Strategic education and storytelling can reframe as a driver of innovation, brand relevance, and long-term value—for both consumers and executive stakeholders.

GUIDING QUESTIONS:

- What would it take to have circularity be a part of Executive corporate goals?
- What stories and metrics help bridge emotional and economic narratives for different stakeholders?
- How can brands prioritize economies of scale for in order to offer consumers accessible price points for circular or sustainably-made products?

PRIORITIZING ENVIRONMENTAL LITERACY

A significant barrier to circularity adoption is the deep knowledge gap that exists across both consumer and executive audiences. Without a shared baseline of environmental literacy, conversations stall before they begin, let alone convert into scalable investment or behavioral change. Efforts to embed educational opportunities must be prioritized in order to gain any further advancements with these key stakeholders.

CONSUMER-FACING STORYTELLING FOR IMPACT

In order to foster a deeper circularity connection with consumers, impact stories must live within the brand's ethos—not just in the sustainability report. Purposeful, humanizing storytelling across all consumer touchpoints and throughout the product experience—including product tags, brand campaigns, influencer partnerships, or utilizing tech-enabled opportunities like digital product passports (DPPs)—can reshape how circularity and the product lifecycle is understood and valued at the consumer level.

BRAND EQUITY THROUGH SUSTAINABILITY & CIRCULARITY

In today's increasingly values-driven market, sustainability and circularity are becoming powerful drivers of brand equity. Brands that authentically prioritize sustainability not only foster stronger consumer loyalty but also establish themselves as leaders in both innovation and responsibility.

By integrating these values into core strategies that are embraced at the Executive C-Suite level, brands can differentiate in a crowded marketplace, resonate with values-driven consumers (especially younger generations), and build long-term resilience against environmental, regulatory, and market challenges.

UNDERDEVELOPED INFRASTRUCTURE

Sustainable material flows need localized, interconnected infrastructure—but current systems for textile collection, sortation, and processing are fragmented and underfunded. Cross-sector collaboration is essential to build accessible, efficient, and resilient solutions.

GUIDING QUESTIONS:

- How can industry coalitions or government funding accelerate efforts to build viable and integrated regional recycling or sortation hubs?
- How do we look at bridge solutions of leaning on globalization for recycling infrastructure until we're able to create that infrastructure in a more regional way?
- Where do open-loop recycling infrastructure investments make the most immediate impact while building toward longer-term circularity?

CREATE REGIONAL INFRASTRUCTURE ROADMAPS

Building circular systems in North America requires clear regional roadmaps for infrastructure like sorting hubs and recycling facilities. These plans should include timelines, capacity targets, and shared accountability between brands, governments, and logistics providers.

In the near term, global recycling systems—especially in Europe—can serve as bridge solutions while local infrastructure scales. What might circular systems look like if we balanced international reliance with domestic investment to reduce emissions and accelerate readiness for rising post-consumer textile volumes?

SUPPORT COALITIONS FOR COLLECTION AND SORTATION

As textile collection scales, who collects product and how it's collected is a large contributing factor in post-consumer textile valorization. Enabling vetted collection methods and collaborating with sortation providers can help reduce material degradation, contamination, and unnecessary emissions, while increasing the quality and utility of recovered textiles. When sortation partners and collection agents work together through a shared coalition, brands can ensure materials are gathered, transported, and processed in a way that maximizes next-best outcomes and supports higher-value reuse or recycling pathways.

REFRAMING OPEN-LOOP RECYCLING SOLUTIONS

The emphasis on closed-loop recycling may unintentionally stall action by sidelining viable open-loop solutions. In the natural environment, materials circulate across systems without waste. Reframing open-loop strategies like downcycling or cross-industry reuse as valuable rather than second-best may help to unlock investment and greater industry acceptance. These systems offer immediate impact while longer-term infrastructure develops, helping to manage today's textile waste crisis more effectively.

MATERIAL ACCESS & FEEDSTOCK LIMITATIONS

Brands alone rarely collect enough post-consumer material for circularity. Scaled access to quality feedstock requires shared systems, collaborative attribution models, and investment in infrastructure that supports open-loop collection and redistribution.

GUIDING QUESTIONS:

- How might brands and sorters pool post-consumer material in ways that maintain transparency, accountability, and storytelling value?
- What policy or procurement levers could help normalize shared responsibility for feedstock creation?
- What role can sorters or logistics partners play in bridging access between waste streams and material innovators?

COORDINATE SHARED FEEDSTOCK POOLS ACROSS INDUSTRY

Open-loop and cross-brand systems are essential to aggregate sufficient volume and variety of post-consumer textiles. Pre-competitive collaboration is critical here—brands can co-develop pooled feedstock models with transparent traceability protocols that still support brand-level attribution and corporate sustainability goals and initiatives.

RECYCLED YARN COMPATIBILITY FOR SEAMLESS INTEGRATION

Recyclers have the opportunity to add value by offering yarns that are simple, neutral, or designed with value-adds that keep durability in mind (e.g., strength or dye retention), enabling brands to easily integrate them into their existing material libraries. By keeping yarns “boring” or focusing on practical enhancements, brands can avoid extensive testing or capsule collections, streamlining innovation into collection development sooner. This approach allows for a smoother transition to sustainable materials, accelerating the adoption of recycled yarns and driving faster progress toward sustainability goals.

EVOLVE PRICING MECHANISMS FOR PREFERRED MATERIALS

As textile-to-textile recycled polyester becomes more widely available, there’s a strategic opportunity to valorize T2T RPET. By aligning the valorization with the growing demand for T2T product and material, this shift can incentivize greater adoption and accelerate progress toward circularity. Making this material more economically viable will help drive impact and support the achievement of 2030 sustainability goals.

COLLABORATION FOR EFFECTIVE POLICY

As sustainability and circularity in fashion evolve, regulation will play a key role in guiding brands toward sustainable practices. However, regulations alone aren't enough to drive meaningful change. Companies want regulations that incentivize sustainability while ensuring equity across diverse market structures, particularly between domestic and online brands.

GUIDING QUESTIONS:

- How can brands actively contribute to the policy-making process without feeling overwhelmed by regulatory burdens?
- What opportunities exist for brands to innovate within the current regulatory landscape?
- How can EPR policies facilitate waste mitigation efforts and balance environmental goals with the practical challenges of implementation for brands of all sizes?

EPR AND POLICY AS ENABLERS OF INNOVATION AND MARKET LONGEVITY

For impact to wider audiences, EPR and sustainability policies can be reframed as catalysts for long-term innovation. That by incentivizing the development of sustainable products, technologies, and business models, regulations can help brands future-proof their operations. Policies can be leveraged as tools for long-term growth and continuous improvement in sustainable practices.

POLICY CO-CREATION WITH BRANDS

Brands have a unique opportunity to shape policy through deeper collaboration with regulators and advocates driving policy development. By engaging in the co-creation process, brands can influence equitable responsibility frameworks that address all types of apparel players, including global online retailers. Additionally, there's an opportunity to standardize LCAs to more accurately reflect impact, particularly through the lens of the waste hierarchy. This partnership ensures policies are aligned with industry realities and provide the necessary support to achieve sustainability goals.

HARMONIZED REGULATION ACROSS REGIONS

A unified regulatory approach opens up pathways for smoother global operations and stronger cross-border collaboration. Harmonized regulations can offer brands the opportunity to simplify compliance and reduce cross-border friction. By advocating for standardized regulations across regions, companies can streamline sustainability initiatives, minimize operational complexity, and enhance efficiency in international markets.

TRANSPARENCY FATIGUE & GREENWASHING RISKS

As consumer and stakeholder trust in brands erodes due to inconsistent sustainability claims and greenwashing scandals, the complexities of truth-telling in sustainability efforts grow. With marketing misnomers and overpromised green claims, it's critical to ensure transparency that resonates with brand audiences.

GUIDING QUESTIONS:

- What frameworks or standards can be further developed or optimized to ensure consistent, truthful sustainability and circularity claims across different sectors?
- How can brands effectively communicate the complexity of impact efforts while maintaining consumer trust and engagement?
- What role do marketing teams play in aligning messaging with credible, verifiable sustainability data, and how can they avoid greenwashing pitfalls?

STANDARDIZE CLAIMS & MESSAGING

To combat transparency fatigue, the industry must create standardized sustainability claims that are easily understood across diverse systems, including mass balance and open-loop models. This will prevent confusion and allow consumers to confidently assess a brand's environmental impact. Clear, consistent messaging can bridge the gap between complex sustainability processes and consumer expectations, ensuring that claims are both credible and actionable. Collaborating on a unified framework for accurate communications can build industry-wide trust and facilitate easier decision-making for both businesses and consumers.

ENHANCE ENVIRONMENTAL LITERACY WITH STORYTELLERS

Marketing and communications decision-makers are crucial in shaping sustainability narratives, but their storytelling must be grounded in environmental integrity. It's not about presenting a flawless image, but about demonstrating genuine commitment and honest communication, even when facing challenges.

To do this effectively, teams must build deeper subject matter expertise in sustainability. This requires ongoing learning—through training, expert collaborations, and cross-functional teamwork—to strengthen understanding of environmental impacts, circularity, and impact measurement. By embedding sustainability knowledge into marketing strategies, teams can craft transparent, impactful stories that engage consumers while avoiding oversimplification or greenwashing, fostering accountability and long-term trust.

TURNING INSIGHT INTO ACTION

Basecamp Summit sparked important conversations and revealed key opportunities for change across our industry. But real transformation comes when we take those insights and put them into motion.

To close our Summit, we offered a collective call to action to the group and invite you to take the same meaningful step: connect with one new external stakeholder and one cross-functional internal stakeholder. Share what stood out to you. Explore how these insights could apply within your organization.

Our collective efforts can shape a stronger circular textile ecosystem in North America.





debrand.ca
@debrandnextlife