



FUTURE  
VISION  
**2030**

FOR THE BRAZILIAN  
TEXTILE AND APPAREL  
INDUSTRY  
STRATEGIES FOR  
SUSTAINABLE

**SENAI**CETIQT

**Abit**  
têxtil e confecção

# THE T&C SECTOR IN BRAZIL

**R\$221 billion**  
in revenue

**5th place**  
world ranking

**R\$ 24.4 billion**  
in taxes and fees

**25.5 thousand companies**  
with more than 5 employees

**1.31 million**  
direct jobs

**R\$ 39.1 billion**  
in wages and compensation

**US\$ 908 million**  
in exports

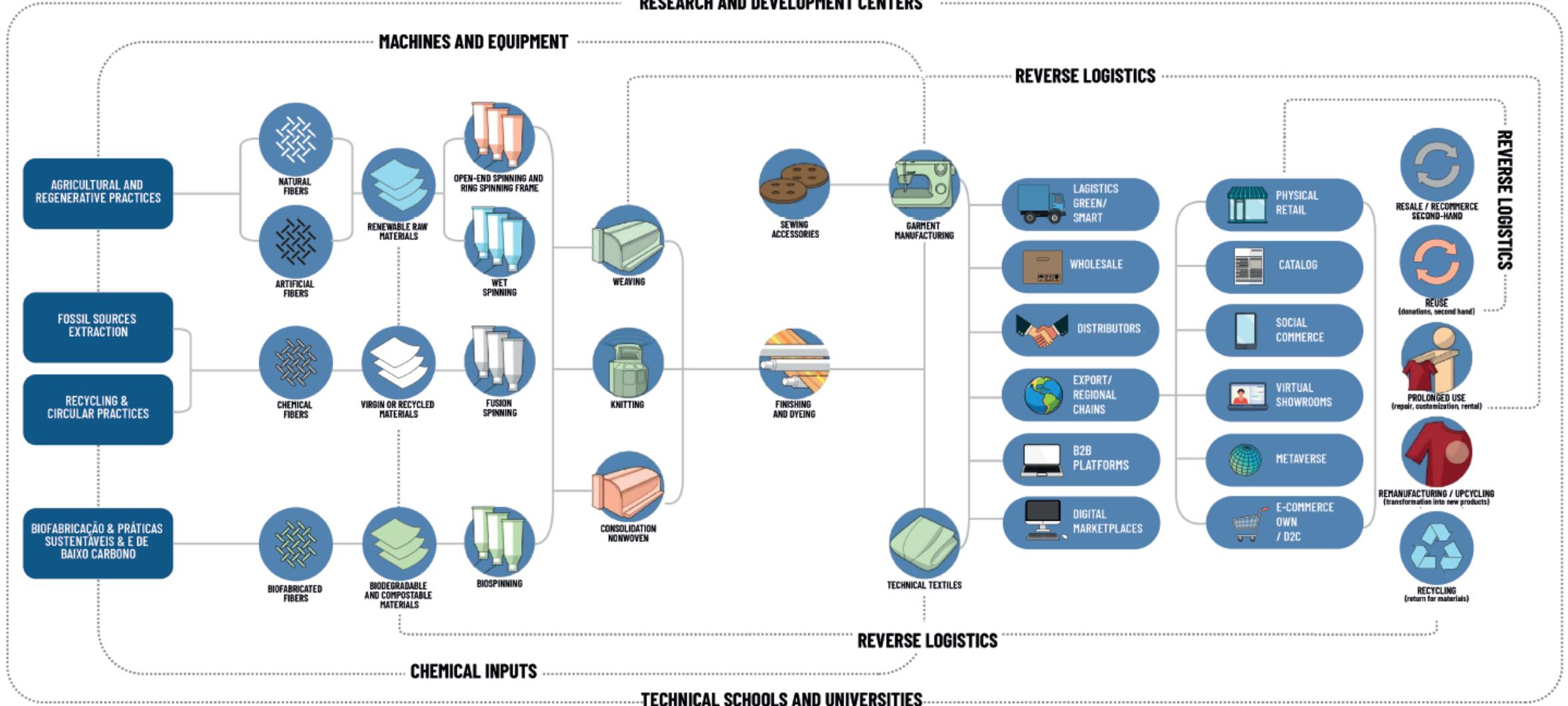
**US\$ 6.6 billion**  
in imports

**- US\$ 5.7 billion**  
trade balance

# Trends and Transformative Forces in the Textile and Apparel Value Chain

MATERIALS	PRODUCTION	DISTRIBUTION	CONSUMPTION	POST-CONSUMER
BIOECONOMY & SUSTAINABLE MATERIALS	SMART FACTORIES & APPAREL 4.0	GREEN LOGISTICS & SUSTAINABLE DISTRIBUTION	EXPERIENCE ECONOMY & NEW RETAIL	CIRCULAR & REGENERATIVE ECONOMY

## RESEARCH AND DEVELOPMENT CENTERS





# ***FUTURE VISION 2030 FOR THE BRAZILIAN TEXTILE AND APPAREL INDUSTRY***

*To be a **sustainable and decarbonized value chain**, guided by the **bioeconomy** and the **development of renewable-based materials**, integrated with **digital technologies and artificial intelligence** as drivers of industrial transformation, and capable of establishing **circular post-consumer models**. To consolidate itself as an **agile, resilient, and innovative sector** that expands its **economic and social relevance** and positions Brazil as a **global reference in the transition toward a regenerative, competitive, and responsible industry**.*



# VISION 2030



BIOECONOMY AND SUSTAINABLE MATERIALS

SMART FACTORIES AND APPAREL 4.0

GREEN LOGISTICS AND CONNECTED CHANNELS

ARTIFICIAL INTELLIGENCE AND DIGITALIZATION

THE EXPERIENCE ECONOMY AND NEW RETAIL

SUSTAINABILITY AND DECARBONIZATION

CIRCULAR ECONOMY AND POST-CONSUMER

# STRATEGIES FOR A SUSTAINABLE AND COMPETITIVE SECTOR

TECHNOLOGY

TALENTS

MARKET

PHYSICAL INFRASTRUCTURE

INVESTMENTS

POLITICAL-INSTITUTIONAL INFRASTRUCTURE

# TECHNOLOGICAL TRENDS AND FOCUS AREAS

TRENDS	STRATEGIC ROLE	TECHNOLOGICAL EMPHASES
<b>SUSTAINABILITY AND DECARBONIZATION</b>	Core Axis	Form the core axis, spanning the entire value chain — from recyclable and biodegradable materials to reverse logistics and post-consumer reuse — establishing the strategic foundation for emission reduction and alignment with global low-carbon goals.
<b>ARTIFICIAL INTELLIGENCE AND DIGITALIZATION</b>	Enabling Forces	Act as enabling forces, driving efficiency at every stage of the chain: from smart agriculture to predictive maintenance, from personalized consumption to traceability through blockchain and digital twins.
<b>BIOECONOMY AND SUSTAINABLE MATERIALS</b>	Innovation at the Base of the Chain	Represent innovation at the base of the chain, replacing fossil-based materials with mycelium fibers, biopolymers, and smart fabrics, reducing environmental impacts and creating competitive differentiation.
<b>SMART FACTORIES AND APPAREL 4.0</b>	Productive Transformation	Embody the productive transformation of the sector, applying Industry 4.0 principles to the factory floor — IoT, automation, 3D printing, on-demand manufacturing, and robotics — to reduce costs, increase flexibility, and connect production to the market in real time.
<b>GREEN LOGISTICS AND CONNECTED CHANNELS</b>	Sustainable Distribution	Translate into sustainable distribution, using route optimization algorithms, smart hubs, and digitalized distribution networks that reduce carbon footprints and support reverse logistics models.
<b>THE EXPERIENCE ECONOMY AND NEW RETAIL</b>	Consumer at the Center	Place the consumer at the center: omnichannel strategies, virtual fitting rooms, augmented reality, digital fashion, and the metaverse transform the shopping experience, while new business models such as rental and subscription expand personalization and sustainability.
<b>CIRCULAR ECONOMY AND POST-CONSUMPTION</b>	Closing the Cycle	Close the production loop, supporting regenerative models through advanced mechanical, chemical, and enzymatic recycling, design for disassembly, upcycling, and recommerce, thereby reducing dependence on virgin resources.

# STRATEGIC DIMENSIONS AND GUIDELINES

DIMENSIONS	STRATEGIC GUIDELINES
<b>TECHNOLOGY</b>	In the technological dimension, it proposes the automation of processes through AI, robotics, and blockchain, applying digital twins for traceability and quality control.
<b>MARKET</b>	In the market dimension, the focus is on expanding international presence through sustainable exports, globally recognized certifications, and the strengthening of the “Brazilian Fashion and Textiles” brand.
<b>INVESTMENTS</b>	In terms of investment, the priority is to create public–private partnerships, promote green financing, and support startups and innovation ecosystems focused on bioeconomy, digitalization, and circularity.
<b>POLITICAL– INSTITUTIONAL INFRASTRUCTURE</b>	In the political–institutional infrastructure, the goal is to align Brazilian regulation with global sustainability and competitiveness standards, simplify bureaucracy, and create policies that encourage innovation and green exports.
<b>PHYSICAL INFRASTRUCTURE</b>	For physical infrastructure, the objective is to modernize industrial parks with energy efficiency, smart logistics, and renewable energy use, while developing digital hubs that connect production chains in real time.
<b>TALENTS</b>	Finally, in the talent dimension, emphasis is placed on training and reskilling professionals in digital and sustainable competencies, promoting diversity, inclusion, and continuous learning in partnership with universities, technical centers, and the Industry System (Sistema Indústria).



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# Thank You!

FERNANDO PIMENTEL