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CLOTHING **CO**CULTURE

THE APPAREL PLAYBOOK FOR

2026

VOLUME 1

FASHION AND EDUCATION

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FROM THE EDITOR

Every new year in apparel arrives with its own kind of electricity. This one carries a sharper charge than most. The ground beneath our industry continues to shift, sometimes subtly and sometimes with a force that feels impossible to ignore. Yet in the midst of that movement, something meaningful is happening. Leaders are beginning to see that progress in 2026 will not depend on returning to what once worked, but on building what has not existed yet.

This issue of *Clothing Couture* was created with that realization at its core. Teams across our industry are being asked to evolve with intention, not urgency. Creativity is being reimagined alongside intelligent tools. Supply chains are being rebuilt with flexibility rather than hope. Sustainability is moving from aspiration to expectation. Financial strategy is taking a new shape as brands shift from chasing expansion to strengthening resilience.

Consumer behavior is evolving toward value, transparency, and trust. Workforces are stepping into a future shaped by skill, curiosity, and adaptability.

Every article in these pages reflects a single idea: reinvention is not a reaction, but a practice. Our contributors offer clarity in a year that refuses to be simple, and encouragement for leaders who know that resilience requires more than perseverance. It requires perspective, imagination, and a willingness to move forward even when the path is not yet fully visible.

My hope is that this issue becomes both a compass and a companion. The industry is stepping into an era defined by complexity, but complexity does not diminish possibility. With sharper tools, clearer insight, and a willingness to adapt, the path forward becomes brighter than it first appears.

Here is to a year shaped not by ease, but by intelligence. Not by prediction, but by preparation. Not by nostalgia, but by courage.

Welcome to The Apparel Playbook for 2026:
Adapt, Innovate, Thrive.

Emily Lane

EDITOR-IN-CHIEF



CC MAGAZINE

STAFF

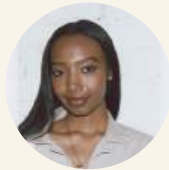
EDITOR-IN-CHIEF

EMILY LANE



CREATIVE DIRECTOR

SABA DESTA



PODCAST TEAM

HADLEY ROBINSON

PHOTO/PRODUCER



SHOCK CITY STUDIO

AUDIO ENGINEERS



BRANDON SLOAN

CINEMATOGRAPHER



www.clothingculture.com
clothingculture@starsintl.net
[@clothingculture](https://www.instagram.com/clothingculture)

Our Contributors

BRET SCHNITKER

As Founder and CEO of Stars Design Group, he champions innovation and evolution to stay ahead in a rapidly changing fashion industry.

ADRIANA MARFISI

Brings a passion for textiles and global sourcing, shaped by travels from Rishikesh to Egypt that deepened her love for culture, community, and craftsmanship.

MEKDES DESTA

A Multimedia Journalism major with a Marketing minor at Loyola University Chicago (Class of 2026), and is a driven first-generation student from St. Louis.

AI WON'T REPLACE DESIGNERS - IT WILL CLEAR THE RUNWAY FOR THEM

BY CLOTHING COULTURE EDITORIAL





There's a moment, quiet and electric, when a line of graphite becomes a living silhouette...when muslin hugs a form, and suddenly the air around it changes. Fashion has always begun in this tender space: the convergence of taste and intuition, memory and culture, emotion and risk. It's the place where a designer says, **"I see it, long before anyone else can."**

We've witnessed this magic before. In 1947, Dior's Bar jacket cinched the waist and released the war's tight fist on the world, ushering in a new way of being—soft power, sculpted hope. Decades later, Alexander McQueen turned a runway into a beating heart of theater: Shalom Harlow in a white dress, pirouetting as robots spray-painted her in a duet of danger and grace; **Plato's Atlantis**, where technology and biology fused into a prophecy of beauty. Long before the industry had a name for it, Elsa Schiaparelli invited surrealism to dinner (lobsters on silk, skeletons stitched in shadow, keys and eyes and anatomy rendered into wit) reminding us that imagination is the most radical fabric of all.

AI can't replicate these moments because they weren't just designs; they were human, embodied, and brave decisions.

This moment in our industry isn't people versus machines. It's about quieting the static so the music of creation can be heard again. AI won't replace designers. It will replace the bad processes that keep them from doing what only they can do.

Creativity Cannot Be Automated

Let's say it plainly. The best work in fashion is not a formula.

Designers carry proportions in their bones. They read the street, the stage, the headlines, and the hush. They know fit not as a vector but as a lived conversation with many bodies.

They hold ethics and empathy, memory and meaning, in every choice—what to reveal, what to protect, what to say without words.

AI can generate options. Designers decide what matters. The difference is not subtle. It's the difference between possible and true.

What AI Should Replace

If there's a villain in this story, it's not technology. It's the friction that steals hours from the hands that make.

Let AI take the weight of what is repetitive, redundant, and slow:

- The scavenger hunt for references across folders, links, and emails
- First-pass sketches that get thrown away, but must exist to move
- Reformatting details that refuse to stay consistent from season to season
- Disconnected systems that won't speak to one another
- Endless sample rounds for incremental changes
- Data entry that nobody chose—and everyone resents

These are not creative acts. They are toll roads. Let's remove them.



A Partnership Between Human Imagination and Intelligent Tools

The future is not artificial. It's augmented.

A designer still begins with a vision, tone, silhouette, and story. Then AI becomes the steady studio assistant, gathering global signals into clear themes, moodboards into early variations, and color stories that honor the brand's DNA, as well as quick studies that bridge the gap between concept and possibility.

From there, the human eye leads. What belongs? What doesn't? What needs to be softened, sharpened, pushed past the obvious? Culture isn't static, and neither is taste. Designers make the calls that algorithms can't.

As the sketch becomes a spec, AI steps back in to smooth the handoff: cleaning metadata, pre-filling the routine lines of tech packs, syncing communication so development can move with clarity.

The craft remains human. The clutter dissolves. This is not speed for speed's sake. It's momentum with meaning.

Practical Enhancements That Protect Originality

Used with intention, AI can:

- Strengthen trend research with real signals (search, social, and sales patterns)
- Propose preliminary silhouettes and palettes from moodboard inputs
- Visualize changes before a sample is cut
- Streamline documentation for development and merchandising
- Help assess how a collection holds together as a coherent story

These are not replacements for the designer's voice; they are amplifiers. They give back the hours where craft can breathe.

Leadership With a Creative Spine

For executive teams, this isn't just a tech shift. It's operational and cultural. The mandate is simple: empowerment, not replacement.

Invest in tools and training. Create guardrails that honor brand DNA. Remove fear from the conversation and invite curiosity in. Make it clear, publicly and repeatedly, that creativity is the company's center of gravity, and AI exists to keep it there.

Guardrails That Protect the Muse

Helpful, human-centered safeguards might include:

- A clear brand DNA rubric that guides every prompt and decision
- Designer-led checkpoints at all creative milestones
- Policies against generic, vague prompts that yield generic, vague work
- Standards for data quality and source integrity
- Transparent communication so adoption feels safe—and shared.

Good governance builds trust. Trust unlocks courage. Courage makes new work possible.



Why This Matters Now

The industry is moving fast. Customers expect clarity and care. Supply chains are tight. Cycles tighten, too. Teams are asked to deliver poetry with precision.

Designers cannot do more by spending more time on less meaningful tasks. AI offers a way to restore balance, to build seasons with intention, to move from hunch to hypothesis more fluidly, to make space for risk again.

With care, AI does not make fashion less human. It makes it more human by removing the noise around the work we love.

The Future Is Designer-Led and AI-Enabled

The designers who thrive won't be the ones who resist every change, nor the ones who outsource their taste to a tool. They'll be the ones who know their value, hold their point of view, and use AI to sharpen it.

Dior taught us how a silhouette can change a mood. McQueen proved that theater and technology can dance. Schiaparelli showed that imagination has no dress code. The lesson is the same in every era: the human mind remains the atelier where it all begins.

AI will not replace designers. It will clear the runway, hold the pins, and keep the lights on, so imagination can take its rightful place at center stage.

Design remains human. AI helps it shine.



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HOW GENERATIVE TECH IS RESHAPING FASHION FORECASTING

BY CLOTHING CULTURE EDITORIAL

Fashion forecasting has traditionally depended on a familiar rhythm. Trend reports arrive after a cultural shift has already taken shape, teams interpret the findings, and product development tries to catch up. That approach still has value, but it is no longer sufficient for the speed of today's consumer and the volatility of modern trend cycles.

Generative technology is changing the pace and precision of forecasting in 2026. Instead of relying on retrospective reporting alone, brands can move toward near real-time forecasting that updates continuously and adapts to specific customers, categories, and channels. The result is not just faster insight, but more relevant insight that is easier to turn into decisions.

From Trend Reports to Generative Insight

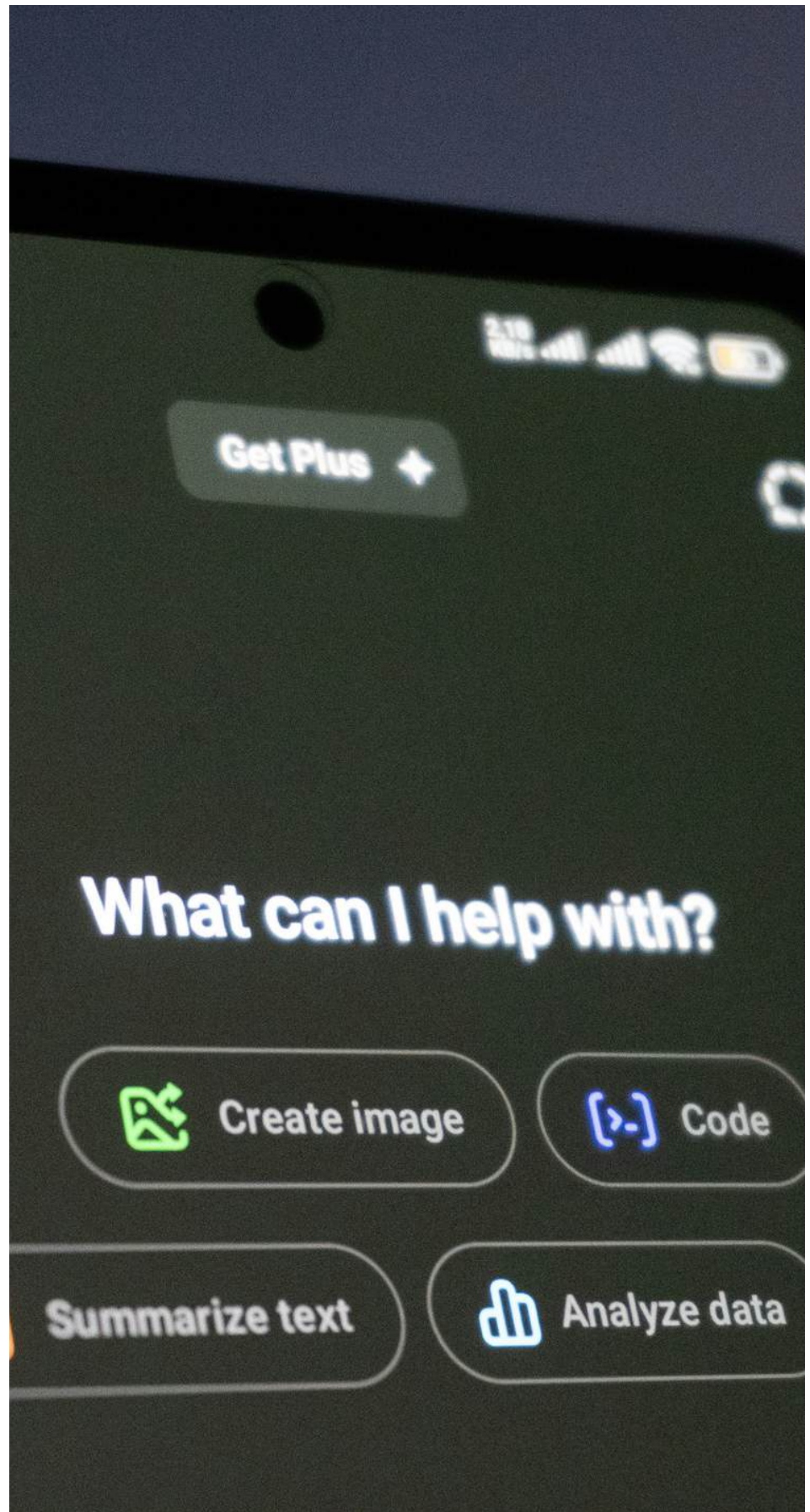
Traditional forecasting works best when fashion moves in long arcs. The current environment is shaped by micro trends, creator-driven aesthetics, and algorithmic discovery that can elevate a niche look overnight. Generative models compress discovery cycles by scanning large volumes of inputs, identifying patterns, and surfacing directional summaries quickly. Speed matters because trend intelligence loses value when it arrives after assortments are already committed. Specificity matters just as much, because a trend that is meaningful for one customer segment can be irrelevant for another.

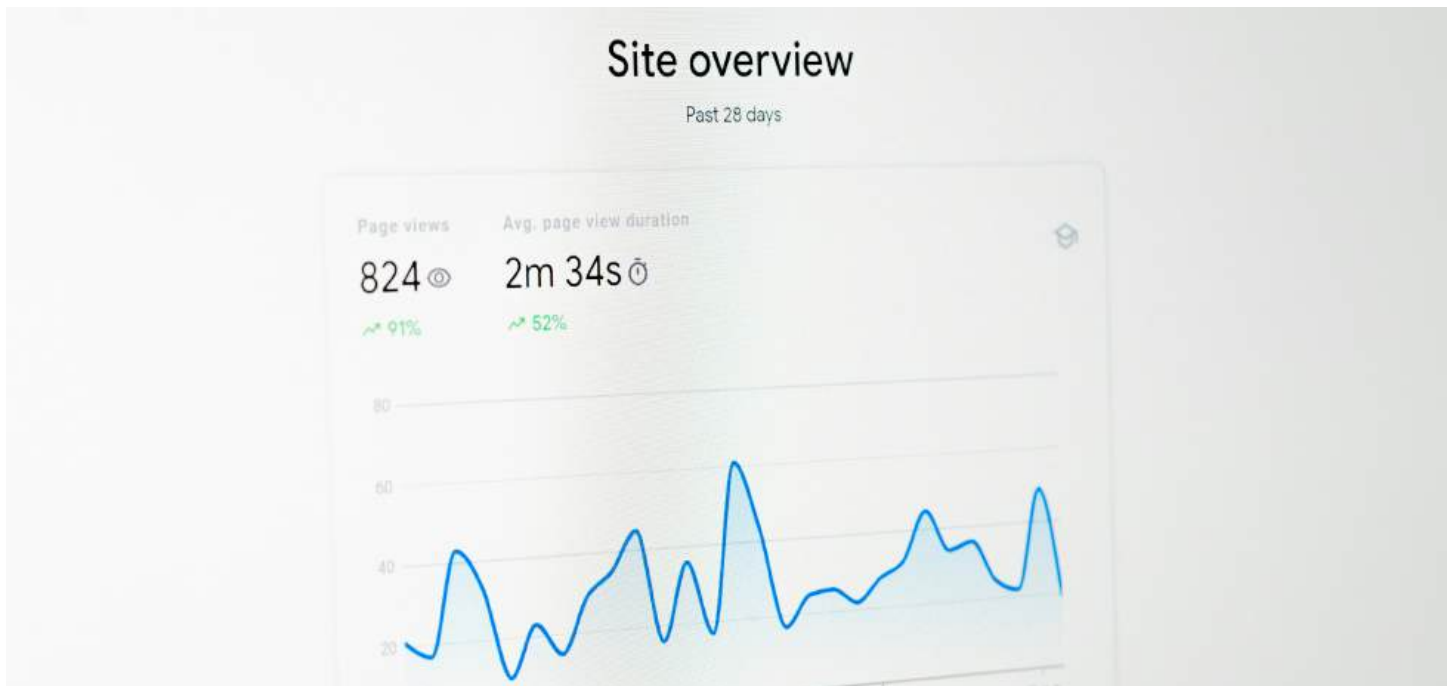
“INSTEAD OF RELYING ON RETROSPECTIVE REPORTING ALONE, BRANDS CAN MOVE TOWARD NEAR REAL TIME FORECASTING THAT UPDATES CONTINUOUSLY AND ADAPTS TO SPECIFIC CUSTOMERS, CATEGORIES, AND CHANNELS.”

Inputs That Matter

Better forecasting starts with better inputs. Social content is useful when it is analyzed for repeated behavior rather than isolated virality. Search and site traffic add another layer because they reflect intent. Sell through performance adds a grounded reality check, since it captures what customers actually purchased rather than what they liked or saved. Creator momentum rounds out the picture, since creators often introduce styling codes before brands formalize them.

When these signals are unified, forecasting becomes less dependent on intuition and more dependent on probability. The goal is not to eliminate taste, but to reduce blind spots and accelerate the path from signal to strategy.





Generative Use Cases

One of the most practical applications of generative tech is capsule ideation. Models can translate signals into a usable capsule outline, including theme direction, category focus, and styling language that can be refined into a coherent story.

Color forecasting is another high-impact area. Color shifts quickly and behaves differently across categories, price points, and regions. Generative tools can iterate color stories rapidly while staying anchored in market signals. A team might start with a seasonal palette, then test variations based on demand, adjusting neutrals, soft tones, and accent colors without losing weeks to manual iteration.

Silhouette exploration is also changing. Teams can simulate proportion changes early and compare options in context, which supports faster alignment and reduces late-stage rework.

Risk Controls

Generative forecasting introduces real creative risk, especially the risk of homogenization. Models trained on broad data can push outputs toward the average if teams treat them as final answers. Brand identity must remain the filter through clear creative constraints, strong human ownership, and a diverse mix of inputs. Governance also matters, since teams need clarity on approved tools, data sources, and how outputs are tracked across seasons.

Organizational Enablement

The brands that benefit most are not the ones with the most tools, but the ones that build usable workflows. Designers need training that focuses on asking better questions. Merchandisers need training that helps translate signals into assortments and timing. Cross-functional alignment improves when teams share language and repeatable forecasting rituals.

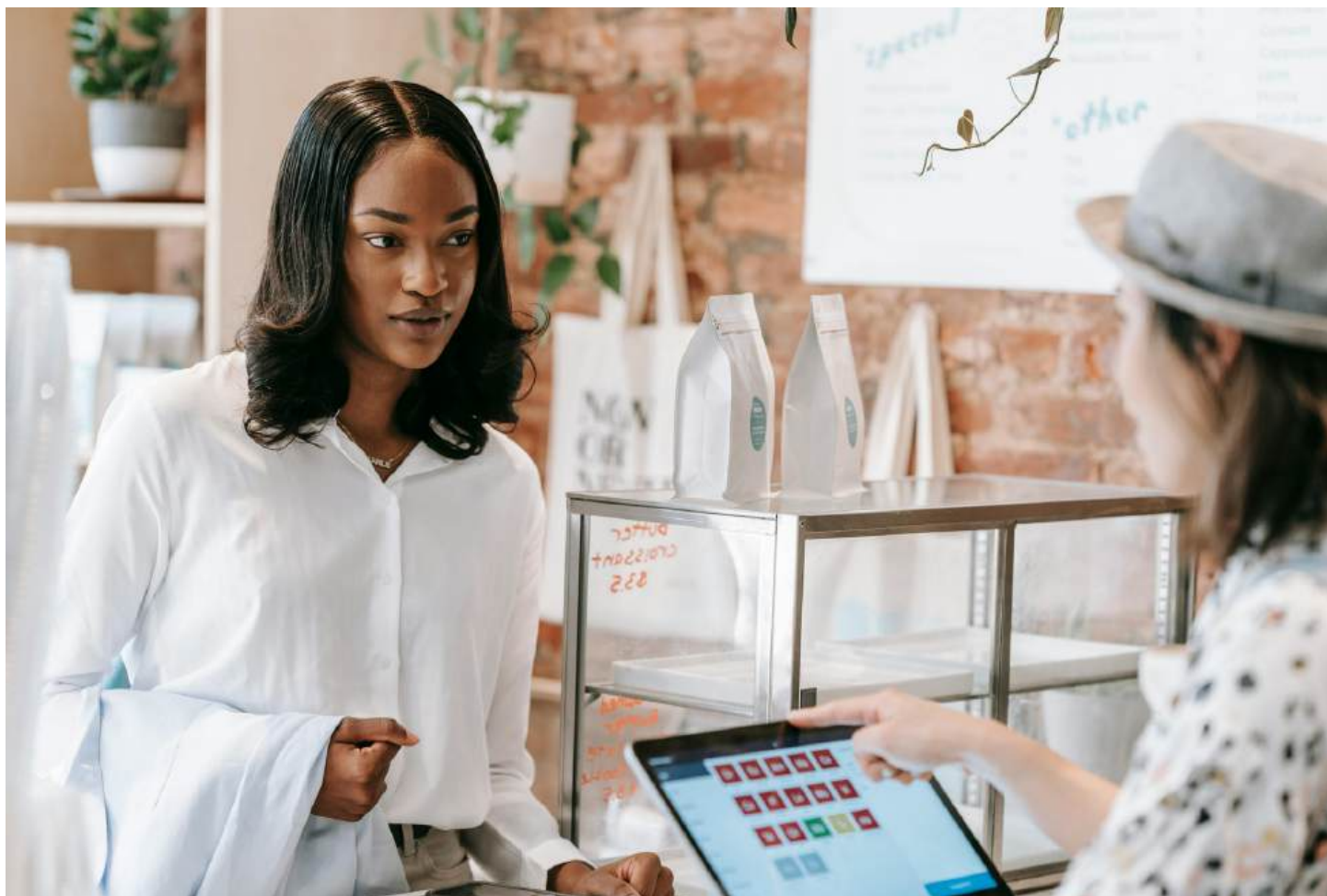
Success Metrics

Generative forecasting should be measured in outcomes. Forecast accuracy shows whether the right direction was reached by the customer at the right time. Time to sample captures speed gains. Adoption rates reveal whether tools are embedded in real work. Decision speed, fewer revisions, and commercial performance complete the picture where data is available.

A Live Forecasting System

Fashion forecasting is moving toward a model that behaves more like a live system than a seasonal report. Generative technology is accelerating that shift by making trend intelligence faster, more specific, and easier to operationalize. When used with the right inputs, controls, and team enablement, generative forecasting does not dilute creativity. It gives teams more time to focus on what they do best, which is making the right choices with a clear point of view.

AI-POWERED PERSONALIZATION: THE FUTURE OF CUSTOMER EXPERIENCE



BY BRET SCHNITKER

There is a moment in every industry when the familiar horizon suddenly expands. Fashion and retail are standing in that moment right now. A wave of intelligence is moving through our world, reshaping how we create, how we communicate, and how we connect with the people we serve. This is not a story about technology for technology's sake. **This is a story about possibility.**

Personalization has long been the promise whispered across boardrooms and brainstorm sessions. Early attempts felt mechanical, as if we were trying to simulate closeness with a handful of tokens and rules. AI has changed the scale of what is possible. Personalization 2.0 is not a trick of the interface. It is a living system that reads context, interprets behavior, and responds with a level of nuance that mirrors human intuition.

Imagine a product detail page that behaves less like a static billboard and more like a stylist who understands the shopper's intent. Size and fit recommendations remove hesitation. Dynamic bundles reveal combinations that feel curated rather than computed. Content shifts with the grace of a well-timed conversation, offering relevance that feels earned.

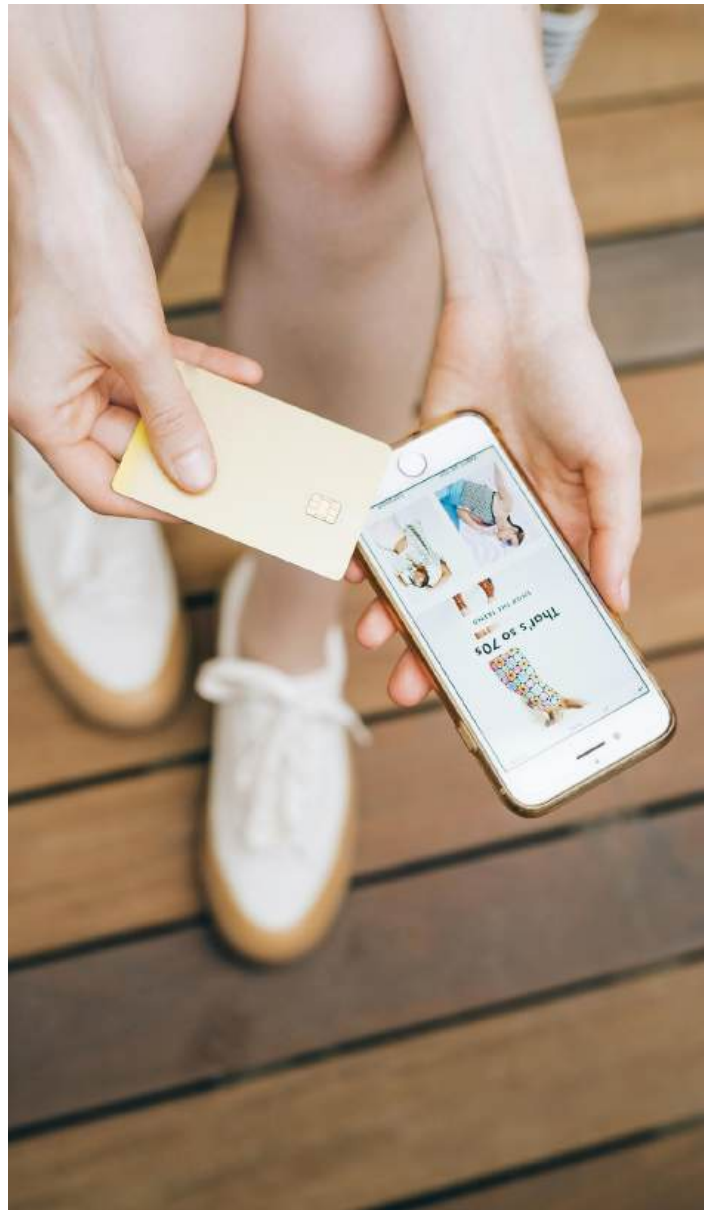
Email and onsite search are stepping into their own renaissance. Search results no longer rely on popularity alone. They reflect personal style, past behavior, and subtle signals that reveal what a customer truly wants. Lifecycle emails evolve with the customer, adjusting tone, timing, and substance with a sensitivity that strengthens the relationship long after the first purchase. Postpurchase experiences become a continuation of the brand's voice, offering guidance, inspiration, and thoughtful suggestions that reduce returns while deepening loyalty.

Trust forms the foundation of this new era. Customers are granting brands access to their preferences, their patterns, and their attention. That access must be treated with respect. Consent, transparency, and data minimization are not compliance checkboxes. They are the pillars of credibility. A brand that explains how AI works earns confidence. A brand that collects only what is necessary earns long-term loyalty.

Omnichannel consistency is becoming the architecture of modern commerce. A preference expressed on a mobile app should echo through the store experience. A discovery made in-store should inform future CRM outreach. This continuity creates a sense of belonging, as if the brand has built a world where every touchpoint recognizes the individual who steps inside.

Measurement transforms ambition into strategy. Uplift testing reveals which experiences truly influence behavior. Lifetime value analysis uncovers the long arc of customer relationships. Return reduction becomes a measurable outcome rather than a hopeful aspiration. Leaders who commit to disciplined measurement gain clarity that fuels confident decision-making.

The build-versus-buy decision is becoming one of the defining strategic choices of this decade. Internal development offers control and the freedom to innovate without constraint. External platforms provide speed, stability, and a constant stream of



advancements. The most successful organizations evaluate tools not only for features, but for interoperability, explainability, and the ability to evolve alongside their vision.

AI is not here to replace the creative soul of our industry. It is here to amplify it. The brands that will define the next decade are the ones that pair human imagination with machine intelligence to craft experiences that feel personal, intuitive, and unmistakably human. This is the moment to step forward with curiosity, to experiment boldly, and to shape a future where technology elevates the artistry of customer experience.

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LEADING IN FASHION TREND FORECASTING

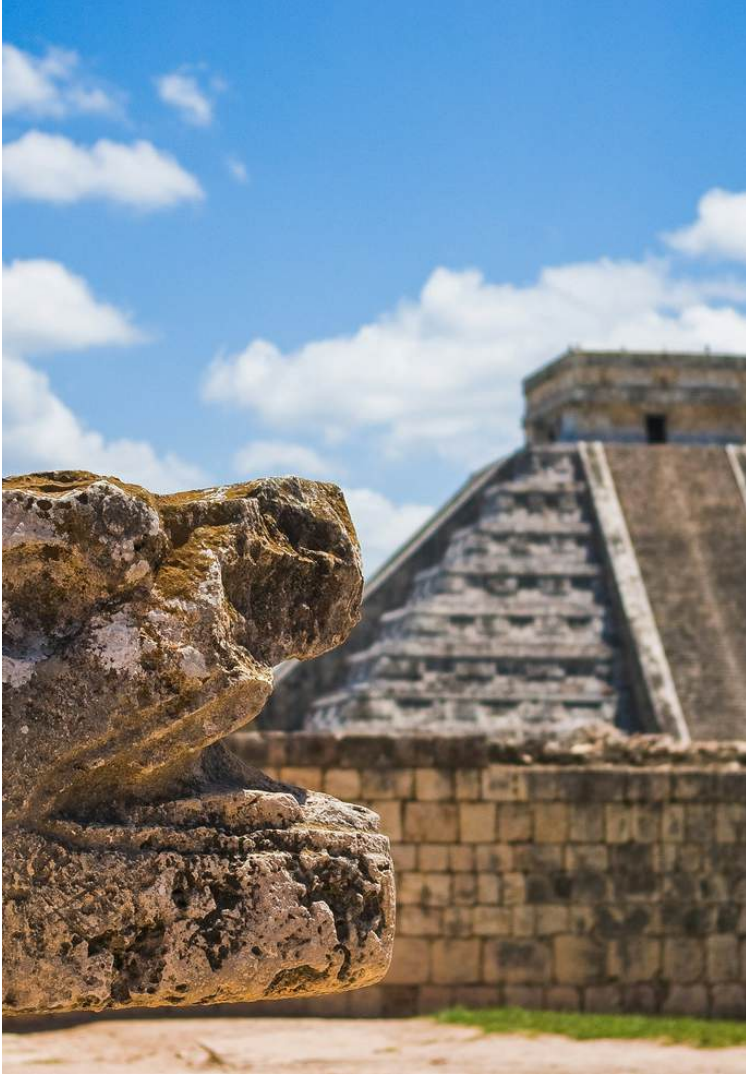
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NEARSHORING WAS THE PROMISE. IS IT ACTUALLY DELIVERING?

BY CLOTHING COULTURE EDITORIAL

Nearshoring has become one of the most discussed supply chain strategies in the American fashion apparel industry. The idea is straightforward: move production closer to the U.S. consumer to reduce risk, shorten lead times, and improve flexibility after years of disruption tied to long, Asia-centric supply chains. Nearshoring has delivered measurable benefits in select cases, yet the reality is more constrained than many industry narratives suggest.



“NEARSHORING IS DISTINCT FROM RESHORING, WHICH REFERS TO MOVING PRODUCTION BACK INTO THE UNITED STATES ITSELF.”

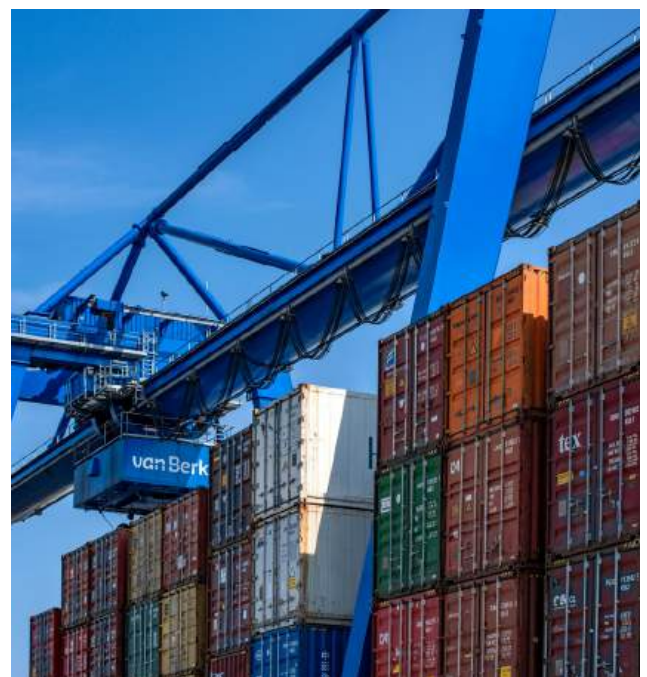
Mexico has also become the United States’ largest overall trading partner by value in 2025, according to the New York Times, driven by growth across multiple manufacturing categories, including some textiles and apparel. Nearshoring has primarily functioned as a diversification strategy rather than a replacement for Asian sourcing. Asia still accounts for approximately 73% of U.S. apparel imports, depending on the product category.

What Nearshoring Means in Apparel

In the U.S. fashion context, nearshoring typically refers to shifting some production from Asia to Mexico and Central America, particularly Guatemala, Honduras, El Salvador, Nicaragua, and the Dominican Republic. These countries operate under trade frameworks such as USMCA and CAFTA-DR, which offer tariff advantages for qualifying goods. Nearshoring is distinct from reshoring, which refers to moving production back into the United States itself.

Import Data Shows Incremental Change, Not Transformation

U.S. apparel import data shows that China’s share of total U.S. apparel imports has declined since 2015. In July 2025, imports from Mexico grew by just 0.5%, but CAFTA-DR countries members decreased by 2.7% in that same period. Overall, US apparel imports in October 2025 declined by 18.2%, which is the worst performance in years.



“TRADE AGREEMENT ADVANTAGES ALSO REMAIN MEANINGFUL — THOUGH THEY’RE INCREASINGLY SUBJECT TO CHANGE UNDER THE TRUMP ADMINISTRATION.”



What Is Actually Working

Nearshoring’s most consistent advantage is strategic flexibility. Regional production can reduce handoffs across the supply chain and create faster decision cycles, even when transit times are not dramatically shorter in every lane. Trade agreement advantages also remain meaningful — though they’re increasingly subject to change under the Trump administration, where tariff policy has become more fluid and politically driven. Under USMCA and CAFTA-DR, qualifying apparel goods can still receive meaningful duty savings, reinforcing why many brands continue to prioritize compliant sourcing across these regions.

What Sounds Like It Works, But Often Does Not

Lead time claims are frequently overstated. Asia is not always 30 to 40 days. Some routes to LA ports can be closer to 15 days, while several Latin American routes can land in the 19 to 30 day range, depending on ports and routing.

Nearshoring can still improve responsiveness, yet it should be framed as conditional rather than automatic.

Logistics cost narratives can also become distorted. Freight volatility has reinforced interest in nearshoring, although the most repeated peak-cost figures are not consistently reliable when carried across contexts. The more durable takeaway is that freight shocks can influence sourcing decisions quickly, even when they do not permanently reshape production footprints.

Where the Hype Breaks Down

Capacity remains the central limit. In 2022, the Western Hemisphere accounts for roughly 16.6% of global apparel manufacturing capacity, compared with Asia’s approximately 73.5%. The rest of the world is at 9.8%. This gap explains why nearshoring has delivered incremental change rather than transformation.



Specialization also constrains growth. Advanced technical apparel production is concentrated in key hubs like Honduras, Guatemala, and Brazil, making it only a small percentage compared to all of Asia. Apparel manufacturing is an ecosystem, and ecosystems take time to build.

Domestic U.S. Production Remains Niche

True reshoring remains limited. Domestic apparel production accounts for approximately 2 to 3% of total U.S. apparel consumption as of 2025. The average U.S. apparel manufacturing wages stand at roughly \$18 an hour, significantly higher than nearshore alternatives. Small-batch and rapid-turn production exist, yet most domestic facilities still rely on imported textiles, especially specialized textiles and materials.

Policy and Investment Signals

Foreign direct investment in Mexican manufacturing rose by approximately 9% in 2025, with textiles and apparel-adjacent industries capturing a portion of that growth.

In Central America, manufacturing had a strong growth of about 11.5% in 2025. Results still vary widely depending on infrastructure quality, workforce availability, and political stability.

Conclusion

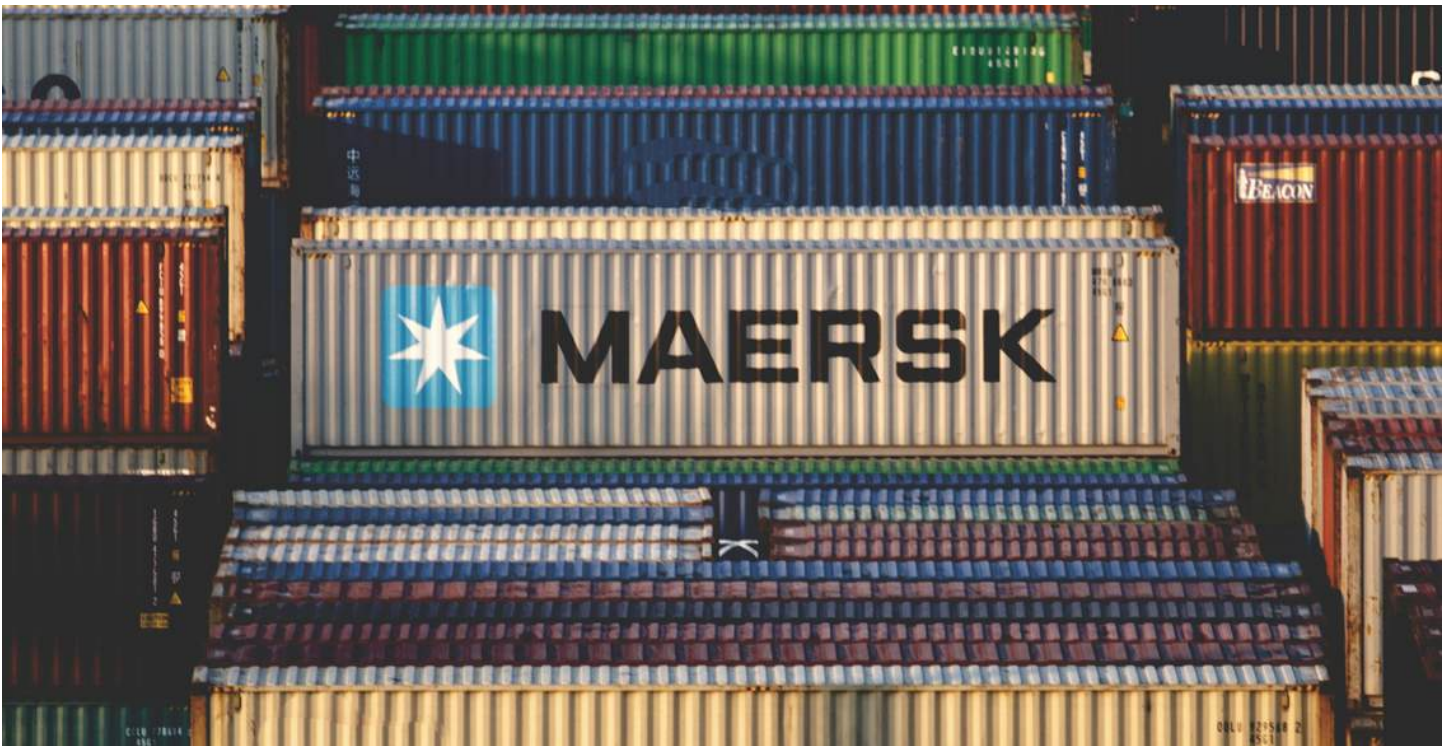
Nearshoring has delivered real benefits for parts of the American fashion apparel industry, particularly in flexibility, trade-driven savings, and supply chain risk management. Mexico and Central America now play a more strategic role in U.S. sourcing than they did a decade ago. Nearshoring has not replaced Asian manufacturing, and it has not triggered broad reshoring to the United States.

The promise of nearshoring is conditional. For most brands, it is not a silver bullet. It is a disciplined supplement in an increasingly fragmented global sourcing landscape.

BUILDING RESILIENT SUPPLY CHAINS: LESSONS FROM RECENT DISRUPTIONS

BY BRET SCHNITKER





When the world began to shift, first under the weight of a global pandemic, then through waves of geopolitical unrest, factory closures, port blockages, inflationary surges, and widespread labor shortages, the apparel industry encountered something it hadn't fully prepared for: the sudden realization that the systems it trusted were more fragile than they looked.

Ships drifted in the wrong oceans. Dyehouses shut down with little warning. Freight costs soared before anyone could adjust budgets. Even seasoned operations teams found themselves navigating crises no playbook had ever accounted for.

What initially felt like isolated misfortunes soon revealed a pattern. Many supply chains had been designed with elegant efficiency, but little redundancy. One region supplied nearly all raw materials. One carrier was entrusted with half the freight. One factory group carried the weight of hundreds of styles. And because visibility into tiers beyond the first was foggy at best, risk moved silently upstream—out of sight, out of control.

The lean systems that once optimized margins buckled under volatility. Buffers that had quietly eroded over the years suddenly showed their worth by their absence. When demand spiked or capacity dipped, there was no protection left.

In the end, the realization was sobering: What failed were not people, but the foundations they were given. Those foundations were never meant for this kind of storm.

Visibility Upgrades: Seeing What You Couldn't Before

Once the cracks became clear, the next revelation followed naturally: you can't stabilize what you can't see.

Teams that previously operated in partial darkness began to understand just how much power comes from transparency. When planners could watch fabric move into the dyehouse in real time, or see sewing lines falling behind before delays escalated, the tone of operations shifted from reactive to anticipatory. A missed milestone was no longer a surprise; it was a signal—one that arrived with enough time to make a different choice.

This newfound visibility rewrote the way organizations talked about suppliers as well. Patterns that once felt anecdotal became quantifiable truths. A mill consistently struggled with dyeing throughput. A factory reliably hit first pass quality. A region showed predictable seasonal volatility. These weren't stories swapped in hallways—they were indicators that shaped strategy.

And as traceability extended beyond Tier 1, something extraordinary happened: raw material delays no longer arrived as shocks. Teams could see the pressure building before it became a crisis. Traceability created a kind of early warning system that transformed fear into foresight.

Visibility wasn't just helpful. **It was transformational.**

Inventory Resilience: Designing Shock Absorption

With visibility improving, brands began examining the role inventory plays not merely as cost, but as protection. In times of stability, low inventory feels efficient. In times of volatility, low inventory feels dangerous.

What emerged was a more nuanced understanding. Inventory resilience wasn't about stockpiling; it was about placing buffers with intention. Organizations discovered that when you know which SKUs drive the business, you know where to invest your attention, and where not to. Some products deserved daily scrutiny. Others simply needed a reliable replenishment rhythm.

Postponement strategies further softened the turbulence. When brands delayed certain decisions (color selection, trim choices, packaging) the chain became more adaptable. They bought time. And in a volatile world, time is often the most valuable asset.

Strategic buffers, placed in the right locations, worked like shock absorbers. Instead of amplifying variability, they absorbed it. The system didn't just hold...it flexed and then recovered.

Inventory resilience became less about managing cost and more about managing confidence.

Supplier Relationships: Strength Built Before You Need It

As organizations looked beyond the inventory and toward the humans who make the supply chain move, another truth surfaced: during the toughest months, suppliers revealed who they truly were.

Some partners stepped into the chaos with courage. They shared their capacity constraints openly, proposed workarounds, shifted their lines, and protected their commitments with grit. Others withdrew, communicated less, or avoided difficult conversations entirely.

The difference came down to relationship depth. Brands that had invested in trust (through shared forecasts, clear expectations, and collaborative planning) found that their suppliers became extensions of their own teams when disruption hit.



Capacity reservations, once seen as optional, suddenly became essential. Shared visibility built a sense of partnership instead of a transaction. SLAs set expectation that prevented fires instead of simply managing them.

The lesson was unmistakable: You don't build resilient relationships during a crisis. You build them long before.

Scenario Planning: Preparing for a Future That Won't Sit Still

Once organizations stabilized the present, they began preparing for futures that could shift without warning. They moved away from single-number forecasts and embraced ranges—flexible, probabilistic views of demand that allowed for movement without panic.

Scenario planning became the quiet muscle behind resilience.

Teams ran mock simulations:

What if a port shut down for 30 days?

What if material prices spiked?

What if demand surged unexpectedly—or evaporated?

These weren't hypothetical exercises. They were rehearsals. And when real disruptions eventually mirrored those scenarios, teams didn't freeze—they activated playbooks they had already practiced.

Scenario planning removed the surprise from the unexpected. It didn't predict the future. It prepared teams to meet it.



Operating Rhythm: Where Resilience Becomes Routine

With systems strengthened and planning refined, the final stage of resilience came from building a rhythm, a heartbeat that kept the organization aligned.

Weekly S&OP cycles replaced long, inflexible planning windows. Issues surfaced early, small adjustments replaced big pivots, and conversations across departments became fluid instead of forced.

Cross-functional war rooms added another layer of strength. In moments of disruption, teams didn't scatter; they gathered. Decisions became fast, precise, and shared. The organization moved as one system instead of silos tugging in different directions.

Resilience no longer depended on heroics. It became a habit... steady, predictable, and deeply embedded.

Resilience Is a System—Not a Mood

The disruptions of recent years showed us that our vulnerabilities were not accidents. They were consequences of design choices that made sense in stable times, but not in volatile ones.

Now, with clarity and intention, we have the chance to redesign everything.

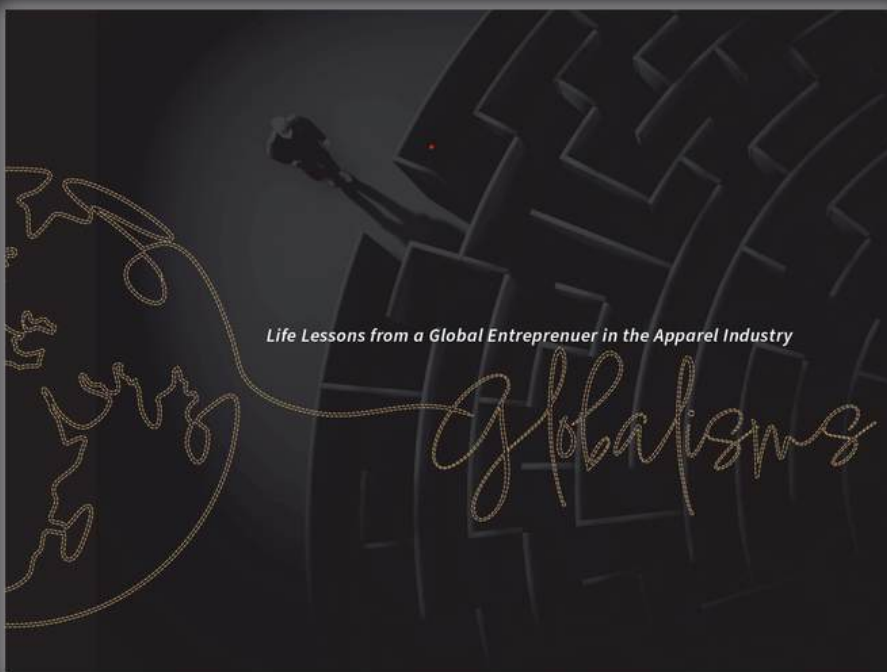
- To create supply chains that bend without breaking.
- That sees risk before it materializes.
- That recover quickly and move with purpose.
- That protects margins, creativity, and trust.

Resilience isn't optimism. It isn't improvisation. It isn't luck.

Resilience is architecture - built deliberately, tested continually, and strengthened over time. The organizations that design for it will not only weather the next disruption. They will rise because of it.

Globalisms

BY BRET SCHNITKER,
CEO OF STARS DESIGN GROUP



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THE GEOPOLITICAL SHIFT IN APPAREL SOURCING: POLITICS IS NOW A SOURCING STRATEGY

BY ADRIANA MARFISI

The global fashion landscape has transitioned into an era where geopolitical literacy is as vital as design aesthetics. Traditionally, sourcing professionals prioritize cost, speed, and quality when selecting manufacturing partners. Today, political maneuvers and international trade policies dictate the viability of supply chains more than labor rates or fabric availability. Decisions that were once purely operational are now inherently strategic reflections of the fluctuating relationship between major world powers.

The Impact of U.S. Tariffs on Supply Chains

Recent shifts in United States trade policy have significantly disrupted long-established manufacturing hubs. The implementation of Section 301 tariffs on Chinese imports forced brands to reconsider their heavy reliance on the world's largest apparel exporter. According to the United States International Trade Commission (2023), these duties have led to a measurable decline in the share of U.S. apparel imports originating from China as companies seek to mitigate rising costs.

These fiscal pressures extend beyond simple tax increases. Brands face complex compliance requirements and the constant threat of sudden legislative changes. **The unpredictability of trade barriers creates a volatile environment where a profitable sourcing destination can become a financial liability overnight.** Consequently, the fashion industry is witnessing a massive migration of production to Southeast Asia and Central America.



While Southeast Asia and Central America are key players in the global production shift, Bangladesh and Pakistan remain indispensable as their strategic value lies in a combination of massive scale, vertical integration, and evolving sustainability standards that few other regions can really match at current price points. Bangladesh is currently the world's second-largest apparel exporter and has successfully pivoted from a low-cost provider to a global leader in sustainable manufacturing with more than 200 LEED-certified factories (Textile Today, 2023). Meanwhile, Pakistan offers a distinct strategic advantage through its vertical integration; as a major cotton producer, it provides a stable supply chain for denim and knitwear that mitigates the risks of importing raw materials (International Trade Centre, 2024).

As of early 2026, a landmark trade deal with the U.S. allows zero reciprocal tariffs on certain apparel made with U.S.-sourced cotton or man-made fibers, potentially increasing exports by \$5 billion over three years.

Strategic Solutions for Navigating Trade Barriers

To remain competitive under the weight of modern tariffs, apparel executives are adopting diversified and agile sourcing models. The following strategies represent the primary methods for navigating this new protectionist era:

- **Geographic Diversification:** Moving production to countries like Vietnam, Bangladesh, and India allows brands to bypass specific bilateral tariffs. This "China Plus One" strategy reduces the risk of total supply chain paralysis if political tensions escalate further.
- **Nearshoring and Reshoring:** Relocating manufacturing closer to the end consumer, such as in Mexico or the Dominican Republic, leverages regional trade agreements like the USMCA. These agreements often provide duty-free access to the American market while reducing transit times.
- **Tariff Engineering:** Designers and sourcing agents collaborate to alter the material composition or classification of a garment. Minor changes in fiber content can move a product into a lower duty category under the Harmonized Tariff Schedule (2024).
- **Vertical Integration:** Investing in owned manufacturing facilities gives brands greater control over their origins. Ownership provides transparency and makes it easier to verify that products meet strict labor and environmental standards required by Western legislation.



**“THE UNPREDICTABILITY
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OVERNIGHT.”**

The Rise of Data-Driven Policy Analysis

Success in this environment requires more than just moving factories. Forward-thinking companies are investing in specialized trade compliance teams that monitor legislative developments in real time. Advanced software now tracks the "rules of origin" for every component of a garment, from the raw cotton to the final zipper. Such meticulous documentation is essential for proving eligibility for trade preferences and avoiding hefty fines from customs authorities.

The intersection of fashion and politics is no longer a temporary trend. It has become a permanent feature of the industrial landscape. As nations continue to use trade as a tool for foreign policy, the most resilient fashion brands will be those that view sourcing through a diplomatic lens.

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SUSTAINABILITY MADE SIMPLE: BREAKING BARRIERS FOR APPAREL BRANDS

BY ADRIANA MARFISI

Sustainability is Now a Strategic Necessity

The global fashion landscape is currently witnessing a profound transformation as environmental responsibility shifts from a “would be nice to have” sentiment to no longer being an optional “extra” or PR stunt; it is now a core requirement for making sales, keeping investors, and staying legal. Consumers are increasingly demanding transparency, with 73% of Gen Z shoppers reporting a willingness to pay more for genuinely sustainable goods (First Insight, 2023).

Despite this growing demand, the industry continues to face significant hurdles, as 59% of sustainability claims made by brands in 2024 were found to be vague, misleading, or unverifiable (Changing Markets Foundation, 2024). Moving beyond these barriers requires a strategic overhaul of the entire apparel supply chain, beginning with a fundamental shift in how brands source and utilize materials.

Implementing Strategy Across the Supply Chain

Brands can achieve meaningful change by embedding sustainability into every link of their operations through technological integration. This journey often begins with supply chain transparency, where digital platforms and blockchain technology allow companies to track a garment from its raw material origin to the finished product in real-time. Implementing on-demand manufacturing or “just-in-time” production helps eliminate the estimated 120 million metric tons of clothing thrown away worldwide annually (Global Fashion Agenda, 2024).

Adopting circular economic principles like garment take-back programs and repair services ensures that products remain in use longer. This directly addresses the fact that 85% of all textiles currently end up in landfills each year (United Nations Environment Program [UNEP], 2024).

Sustainable Sourcing Strategies for Textiles

Companies are increasingly prioritizing certified materials that meet rigorous global standards like the Global Organic Textile Standard (GOTS) or OEKO-TEX®, which verify both environmental and ethical compliance. Many brands are now moving toward nearshoring strategies, expanding production in regions like Latin America and Eastern Europe to reduce the carbon footprint associated with long-distance shipping. Another impactful strategy involves green procurement, where brands partner exclusively with manufacturers using advanced water-efficient dyeing processes to mitigate the impact of an industry responsible for 20% of global industrial wastewater (World Bank, 2024).

New Sustainable Developments in Textiles (2025-2026)

In 2025 and 2026, the fashion industry is moving beyond simple "recycled" fabrics toward bio-fabricated and waste-derived textiles. These materials are no longer just concepts; many are being used in mainstream capsule collections by brands like Ganni, Stella McCartney, and H&M. Innovation in textile science is providing brands with high-performance, eco-friendly alternatives that are set to redefine the market by 2026. Let's look at a few below.

1. Lab-Grown & Bio-Engineered Fibers

- **Lab-Grown Cotton:** Companies like Galy are growing real cotton fibers from plant cells in bioreactors, bypassing the need for fields, pesticides, and massive amounts of water.
- **Brewed Proteins:** Spiber and AMSilk use genetically engineered microbes (like yeast) to "brew" silk-like proteins. These are then spun into Brewed Protein™ yarns, which mimic the properties of cashmere or silk without animal involvement.
- **Self-Healing Squid Fabrics:** Research into squid ring teeth (SRT) proteins has led to fabrics that can self-repair small tears when exposed to heat or water, significantly extending garment lifespans.



2. Advanced Food & Agricultural Waste-Based Leathers

- **Grape & Grain Leathers:** Vegea, using wine waste, and Uncaged Innovations, using grain byproducts like corn and soy, are scaling high-end leather alternatives that fit directly into existing manufacturing lines.
- **Bananatex:** A durable, biodegradable canvas made from the Abacá banana plant. It requires no irrigation or pesticides and is increasingly used by brands like QWSTION and H&M.
- **Citrus Waste Textiles:** Orange Fiber transforms hundreds of thousands of tons of discarded orange peels into a silky, moisture-wicking fabric used by luxury houses like Salvatore Ferragamo.

3. Algae & Seaweed Innovations

- **Seaweed Yarns:** Startups like Keel Labs produce Kelsun™, a seaweed-based fiber that can replace polyester or cotton. It has a low carbon footprint and is naturally biodegradable.
- **Algae Pigments & Dyes:** Instead of toxic chemical dyes, companies like Algaeing use algae to create vivid, biodegradable pigments that also offer skin-friendly antioxidant properties.

4. Bio-Fabricated Hardware & Details

- **Microbial Hardware:** Valupa grows functional components like buttons, buckles, and toggles from microbes fed on starch, creating fully compostable alternatives to plastic or metal hardware.
- **Biodegradable Sequins:** Bequin, a bio-based alternative to petroleum-based sequins, allows luxury brands to add shimmer without contributing to microplastic pollution.

The global sustainable fashion market reached \$12.46 billion in 2025 and is projected to grow annually at a rate of 9.9% through 2032 (Fortune Business Insights, 2024). By simplifying the transition through better sourcing and adopting the latest textile breakthroughs, apparel companies can finally bridge the gap between corporate commitment and measurable environmental impact.

INNOVATION SPOTLIGHT:



Reissued Article from Issue 2

If you enjoy this article, feel free to download Issue 2: Sustainability at
www.clothingculture.com.



Each year, a substantial volume of microplastics is shed from synthetic fibers in apparel. Estimates range up to 6 million metric tons of these plastics end up in the ocean annually.

To put this into perspective, we would need a lint roller that had 3 billion square meters of surface space to pick this up...the size of a small country.

WASHING ISN'T CLEAN

How does it end up in the ocean? About 35% of the microplastics accumulating in the ocean come from washing clothes. Roughly speaking, each household generates around 44 pounds of plastic dust each year, and a single garment sheds around 1,900 fibers per wash, so the volume can really add up.

Because the particulates are so small, wastewater treatment plants cannot effectively filter out all microplastics. Once through a treatment plant, water is then destined to cycle back into the water we consume and the environment. Some microplastics become sludge that is repurposed into soil and fertilizer, or what remains heads to the rivers, oceans, and other bodies of water. Simply, the “micro” part is so micro, it doesn’t get managed and ends up everywhere. **The ocean receives the equivalent in weight of more than 50 billion plastic bottles of microfiber pollution each year.**

Watching the sun set or rise over the rippling ocean is a moment of awe. There are many illuminating rays of magic held in the massive bodies of water. Whales launching their extraordinary proportions into the sky, to let gravity follow with a splash that a sumo could envy. Mesmerizing schools of fish streaming in synchronicity, and the vast array of colors shimmering on top and deep within, are all among the myriads of gifts we receive from our seas. The challenges we bring to this treasure on earth are distressing, yet there are solutions to some of the rising concerns, especially when it comes to the impact of plastic pollution and microplastics.

SHEDDING THE PROBLEM

Today, approximately 60% of textiles produced are made with synthetic fibers (such as polyester and nylon), which are inherently plastic. Synthetics are problematic to our environment due to their inability to biodegrade, taking approximately 500 years to naturally break down. In addition to the problem of plastics and synthetic textiles piling up on land and sea, there is a particular problem (or shall we say particulate problem) with a characteristic of these fibers...they shed.



"BETWEEN LACK OF BIODEGRADABILITY AND SHEDDING, WE HAVE A PLASTIC PROBLEM— CICLO® OFFERS A SOLUTION."

Just because the microparticulate are too small to see, doesn't make them innocuous.

These toxic microplastics are ingested by creatures large and small, which can impact their growth, reproduction and their habitat compromising the delicate ecosystem of our oceans. Even when it comes to light in the dark places reaching the depths of the water, there is a challenge. Responsible for a large portion of the ocean's photosynthesis and carbon fixation, phytoplankton's ability to carry out photosynthesis is reduced as these plastic particles block light and nutrients. This has implications for carbon sequestration and oxygen production in the ocean. **Small particles...big problems.**

CICLO® TECHNOLOGY SOLUTION

Between the lack of biodegradability and inevitable shedding, we have a plastic problem. What if there was a solution?

We are thrilled to report there is an innovation in the market that does just that and is available to scale. CiCLO® technology is a nature-based solution that can reduce microplastic pollution by accelerating the biodegradation of synthetic textiles.

CiCLO® comes in the form of a pellet additive that is used during the beginning stage of yarn production. It is a game changer making both poly and nylon yarn mimic natural fibers in biodegradation. When textiles made with CiCLO® enhanced fibers end up in environments where decomposition can occur naturally (such as a landfill), the biodegradation time is reduced to that of natural fibers, such as wool.

With the ability to decompose in approximately 5 years vs a 500-year challenge depending on environmental conditions, one might be concerned about a loss of durability, performance, or overall integrity of the fibers. Fear not as the benefit is only activated in conditions where biodegradation can occur. As long as you aren't living in a dump, your clothes are safe with this process.

SPINNING THE FUTURE

For brands and apparel producers interested in embracing this process in their fiber development, it is easy to implement and does not come at a great cost. Isn't that refreshing! This is a solution that can change the world and doesn't cost a fortune! CiCLO® (good for land, hand, pocket and sea) gives us a reason to feel hope as new important innovations like this are finding an overdue presence in the apparel industry.

For more information on CiCLO®, Clothing Coulture Podcast will be featuring an episode with Co-Founder Andrea Ferris in Season 4. Make sure to subscribe to stay apprised of this upcoming episode and more!



GUIDING THE FUTURE: DATA-DRIVEN INTELLIGENCE TO POWER YOUR BUSINESS





PREPARING FOR AN ECONOMIC SLOWDOWN: SMART MOVES FOR APPAREL BUSINESSES

BY BRET SCHNITKER

There are moments in business when the world quiets just enough for leaders to hear the early tremors of change. The apparel industry is entering one of those moments. Signals are shifting. Consumers are hesitating. Markets are tightening. This is not a time for fear. This is a time for preparation. Resilience is built long before the storm arrives.

Economic slowdowns do not announce themselves with a single headline. They reveal themselves through patterns. Consumer confidence softens. Sellthrough velocity loses its urgency. Promotional dependency creeps upward as brands push harder to move inventory. Leaders who monitor these signals with discipline gain the advantage of time. Time to adjust. Time to strengthen. Time to act before action becomes reaction.

Cash becomes the oxygen of the business during uncertain cycles. Inventory turns must sharpen. Payment terms deserve a fresh round of negotiation. Capital expenditures require scrutiny, not hesitation, because deferral can preserve optionality without sacrificing ambition. Cash preservation is not austerity. It is strategy. It is the art of ensuring that every dollar has a purpose.

Portfolio strategy becomes a stabilizing force when demand becomes unpredictable. Basics provide consistency. Fashion provides upside. The balance between the two determines margin protection. A portfolio weighted too heavily toward novelty becomes vulnerable. A portfolio weighted too heavily toward essential risks stagnation. The strongest brands design their mix with intention, ensuring that creativity and commerciality support each other.

Pricing and promotions become levers of precision rather than blunt instruments. Value ladders guide customers toward the right product at the right price. Targeted offers reward loyalty without eroding margin. Markdown governance prevents panic-driven discounting that damages brand equity. Every promotional decision becomes a choice between short-term relief and long-term health.





Vendor relationships evolve into strategic alliances during downturns. Term renegotiation creates breathing room. Co-op marketing aligns incentives. Consignment pilots reduce inventory risk while preserving assortment breadth. Vendors who share the journey become partners in resilience, not just suppliers of goods.

Scenario modeling becomes the compass that guides leadership through uncertainty. Downside cases reveal vulnerabilities. Trigger-based responses ensure that decisions are made with clarity rather than emotion. Illustrative cash flow scenarios illuminate the path forward, while markdown ROI examples demonstrate where investment still generates return. Leaders who model the future with honesty gain the confidence to navigate it with precision.

Economic slowdowns do not define a company's destiny. They reveal its discipline. They reward those who prepare early, act thoughtfully, and protect the foundations of their business. The apparel brands that emerge strongest will be the ones that treat resilience as a craft. They will monitor signals with vigilance, preserve cash with intention, shape portfolios with intelligence, and build partnerships with integrity.

This is the moment to lead with clarity. This is the moment to strengthen the core. This is the moment to prepare for a future that rewards those who act before the world demands it.

OPERATING LEAN WITHOUT LOSING MOMENTUM: EFFICIENCY STRATEGIES FOR SUSTAINABLE GROWTH

BY EMILY LANE



Lean operations improve agility and quality, without slowing the progress your brand has fought to build.

Every brand that has felt momentum knows what it feels like: that cautious sense of lift, when teams move in sync, product launches land, and customers respond with energy.

Momentum is one of the most exciting and fragile forces in a company's life. It takes years to build and can evaporate in a single misplaced decision.

Nothing threatens momentum quite like economic uncertainty. When budgets tighten and forecasts blur, the instinct is often to pull back. Freeze hiring. Reduce assortments. Slow the calendar. But brands that have lived through enough cycles know a hard truth: **You cannot cut your way to momentum. But you can design lean operations that protect it.**



Lean should never mean shrinking your ambitions. It means sharpening them—choosing what matters most and moving toward it with clarity, speed, and confidence. That’s how momentum stays unbroken.

This article explores how lean principles, when applied thoughtfully to fashion, strengthen operational discipline without compromising creative velocity or market progress.

Lean Principles for Apparel: Finding the Friction That Slows You Down

Momentum rarely disappears in a dramatic collapse. It vanishes in subtler ways—in the accumulated drag of systems that were never designed for today’s pace.

Waste in apparel isn’t always obvious. It’s the sample that never makes it to the decision table. The assortment that grows just wide enough to dilute its own intention. The never-ending revisions that drain the spirit from the work. The approvals are stuck in limbo. The days lost searching for the right file, or the right answer, or the right version.

No single slowdown is fatal. But together? They erode momentum one quiet delay at a time.

Lean in fashion is not about eliminating creativity. It’s about eliminating drag—the kind that makes progress harder than it needs to be. When done well, lean gives teams back the one resource that fuels momentum more than any other: **time**.

Design-to-Deliver Flow: Creating a Rhythm That Carries You Forward

Momentum thrives in environments where work moves with a steady pulse. Not in frantic rushes. Not in unpredictable bursts, but in a fluid, intentional rhythm. A lean design-to-deliver flow that creates that rhythm.

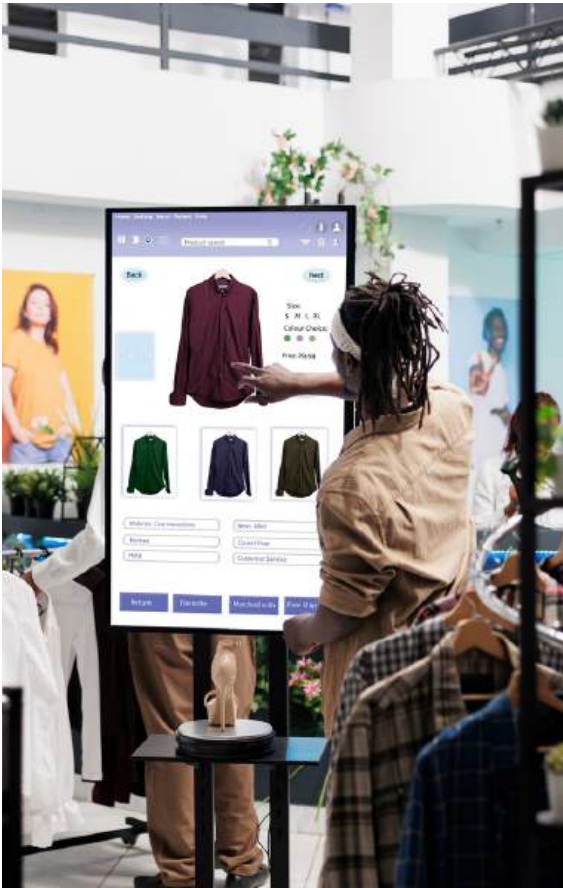
A simple Kanban system (visual, transparent, intuitive) turns the sample pipeline into a shared map. Every sketch, every proto, every approval has a place. Nothing vanishes into inboxes. Nothing accumulates in hidden queues. You can feel the work moving.

When cutting shifts from a “push” model to a “pull” model (where materials aren’t cut until the next stage is truly ready) the entire process settles. Mistakes diminish. Calendars stabilize. Quality rises.

Momentum doesn’t belong to the fastest teams. It belongs to the teams that design flow—smooth, frictionless, sustainable flow.

Quality at Source: Preventing Rework That Slows the Whole Engine

Nothing steals momentum like rework. A single misaligned spec can echo across dozens of styles. A misunderstood fit call can trigger weeks of recutting. A pattern error can ripple through sourcing, costing, and production.



Lean thinking protects momentum by focusing on quality at the moment it's created, not afterward. Clearer tech packs, better first patterns, honest and fast feedback loops reduce waste and reduce time. Having a shared vocabulary between design, technical teams, and factories streamlines communication. This isn't bureaucracy. It's lubrication that keeps teams—creative and operational—moving in harmony.

When defects shrink, calendars breathe. When calendars breathe, teams can explore and innovate. When teams innovate, momentum accelerates.

Planning Cadence: Decisions Made in Time to Matter

Nothing disrupts momentum like late decisions. A season feels on track until two weeks before adoption, when changes cascade through every team downstream.

Lean planning creates safe boundaries around creativity. Shorter, more frequent planning cycles keep teams synchronized. Freeze gates preserve downstream work. Tiered approvals ensure that energy is spent elevating product, not chasing last-minute pivots.

Momentum thrives when decisions come early enough to become direction, not disruption.

Digital Enablers: Technology That Removes Drag, Not Adds Complexity

Lean operations become scalable when supported by the right digital tools.

A modern PLM becomes the single source of truth—the steady center of crossfunctional work. Realtime WIP boards reveal the state of production at a glance. Light automations quietly eliminate repetitive tasks that once consumed hours.

The right technology isn't a replacement for judgment. It's a removal of noise, so judgment can be sharper.

In the best systems, digital tools create clarity, which is fuel for momentum, especially when resources are thin.

Culture & Training: Where Momentum Becomes a Habit

A lean strategy is only as strong as the culture that practices it.

Brief daily touchpoints create a gentle rhythm of alignment, helping teams stay connected and move with shared intention. When leaders step onto the floor—seeing the work with their own eyes rather than through reports—assumptions fall away and clarity takes their place. In that shared understanding, continuous improvement becomes less of a mandate and more of a mindset the whole team carries together.

The emotional truth? Momentum is not built in dramatic breakthroughs. Momentum is built in the quiet habits teams repeat every single day.

When culture supports transparency, curiosity, and ownership, momentum doesn't flicker. It becomes part of the organization's identity.

“A LEAN STRATEGY IS ONLY AS STRONG AS THE CULTURE THAT PRACTICES IT.”

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