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Trends to Tariffs: Where the Stability Lives

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There is a particular kind of vertigo that happens when you are shifting between different rooms quickly in a short amount of time. One conversation is about the AI-generated print that's about to reshape a design calendar. The next is about the price of cotton. The one after that is about a mill in a language you weren't expecting, calculating what a duty shift means for a shipment that already left port. Trend, price, sustainability, wages, oil, cotton, polyester, compliance, customer expectation — none of these live in separate rooms anymore, even though most of our organizations still build separate rooms for them.

Kingpins in New York made it visible. The denim mills brought good work, and underneath the work sat a lot of uncertainty. Production is slower. The question has shifted from how do we win this order to whether the order’s worth winning at all. Large-volume, low-price business filled a lot of order books for a generation and it isn’t a given anymore, so a number of mills have pivoted on purpose toward shorter runs and more specialized product. Fabric that costs more and doesn’t compete on price alone, which matters in a market where price itself won’t hold still. It’s a business model doing its arithmetic over again, order by order.

Brands are running their own version of that math, and by the time they run it most of the room to move is gone. Goods on the water were priced months ago. The fabric's bought, the labor's committed, the floor set is already scheduled. What's left to pull is the ticket price and the size of the next buy. Some raise the price. Others cut the order and carry less risk instead of passing along more cost. Both are reasonable responses to a problem that got decided somewhere upstream, months earlier, by people who weren't thinking about duty rates at the time.

It's a sequencing problem

It'd be easy to say fashion has too many moving parts right now and stability just isn't on offer. I don't buy that. Trend velocity, tariff policy, cotton and oil, labor cost by geography, sustainability commitments, AI adoption. Any one of those, on its own, is something a decent team can plan around. What makes the moment feel unstable is when each one enters the conversation.

Watch how a certification requirement usually surfaces. Design picks the fabric. Sourcing quotes the mill that can actually make it. Then somebody reads the customer's vendor manual closely and finds the mill isn't certified to the standard that customer requires. Now the choices are to re-source and lose the hand design signed off on, or put the original mill through certification and lose the season waiting on it. Or go back to the customer and ask for an exception, which is expensive in a different currency. That conversation belonged in week two. It's happening in week fourteen.

AI arrives the same way. A generative tool drops into the design team and print options go from forty a season to four hundred, and nothing downstream changed to receive them. Tech packs still take what they take. Merchandising still has the same review dates. The mill still needs the same lead time for a strike-off. The tool delivered a much bigger pile in front of the same bottleneck, which is what happens to any tool that gets added to a process instead of built into one.

Tariffs are that pattern with the volume turned up. A certification requirement moves slowly enough that you can watch it come. A tariff changes the economics of a shipment overnight, sometimes while the shipment is at sea, and nobody's retrofitting a strategy at that point, so you run whatever you already built.

The silos outlived their usefulness

Some of this is structural. During the pandemic, departments turned inward because that was how you got through the week, each team solving its own problem on its own deadline. That made sense then. A lot of those walls never came back down, even after people returned to offices or settled into hybrid schedules.

The gap in most of these companies isn't a data problem. Established firms usually have good numbers and mature processes inside each function. Watch what happens when a duty notice lands, though. It hits sourcing first. Sourcing reworks the landed cost and sends it to finance. Finance sizes the margin hit and sends it to merchandising. Merchandising asks design what can still be changed, and design says the line locked in October. Every one of those responses is competent. The conversation that would have mattered was supposed to happen before October, and there was no meeting on anybody's calendar where it could have.

That's the clearest difference I see between companies handling this environment well and companies that feel like they're always reacting. It has less to do with forecasting than with who's in the room and when. Sourcing at the table while design is still exploring. Merchandising that already knows the tariff exposure by the time the calendar locks.

Build for the surprise

None of this makes the surprises go away. Tariff structures keep shifting, cotton and oil keep moving in ways that reach synthetic fiber and freight, and some new AI tool always lands faster than the governance process meant to absorb it. You don't fix volatility. You have the hard conversations early, so that when something moves, the response is a contingency somebody already argued about instead of a fire drill.

That's where I think the stability actually sits. Forecasts about price and policy will keep moving, because that's the nature of this moment, and what holds underneath them is structure. Design, merchandising, and sourcing planning in the same room from the start. Traceability built in at fabric selection, because the alternative is an auditor asking who spun the yarn and the answer living in a two-year-old email thread with a mill that has since changed hands. And a calendar with room left in it, which sounds like the softest item on that list and is usually the first one to break.

The companies that have built that aren't predicting the next disruption any better than the rest of us. They're just not starting from zero when it shows up.

I'm working with the team at Gherzi Americas on exactly these questions now, with companies across the industry. Where the silos are, and what it takes to get traceability and contingency planning built in before the next surprise arrives. If that sounds like your situation, I'd like to hear about it.

Christine is a dynamic fashion executive with fabric and project management expertise on end to end processes globally from Trends to Tariffs. For 20+ years, Christine has helped iconic brands , such as Tommy Hilfiger, Nautica, Ralph Lauren and Walmart, bridge the gap between beautiful design and smart execution through her fabric expertise. Now, with Gherzi Americas, she brings that same thinking to companies navigating an industry where trend, sourcing, and tariffs no longer live in separate conversations.

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