Casual Fabrics and Sustainable Technologies

WeAr DENIM



Artist: Ian Berry

NEW TECHNOLOGIES

sustainable processes shaping the future of textiles and garments

CHANGING MAP

how sourcing, manufacturing and innovation are reshaping the industry

COTTON & FABRICS

from raw materials to new approaches in fabric development

DENIM TRENDS

key silhouettes, washes and directions for the season ahead

Issue 11 – 2/26

www.wearglobalnetwork.com

DEAR COMMUNITY,

We are bound by a fabric that was created as workwear, made to withstand hard wear and tear, and has since evolved to offer flexibility as well. It is a fitting metaphor for our community: strong enough to withstand pressure, flexible enough to adapt. Let's embrace these qualities and keep moving forward. Times are tough, but so are we.

This issue of **WeAr Denim** looks at a central question: how has the denim map shifted in recent years? It is time to let go of old assumptions. Quality denim can come from any geographic location, provided there is the right combination of know-how, machinery, supply-chain expertise, and a commitment to sustainability.

We can no longer rely on what has worked in the past. We need to look ahead and ask how we can adapt to a challenging geopolitical climate, evolving regulation, and uncertain consumer behavior. We have asked experts from across our industry to share their perspectives, bringing you insights into the topics shaping the business today: cotton, automation, and China.

WeAr has always been about community. Our global flagship magazine reaches the international fashion and footwear community through eight language editions and four issues a year. As a publishing house, we also serve selected local communities: **WeAr Showrooms DACH** and **WeAr Showrooms Paris** connect brands, agents, and buyers within their respective wholesale markets. **WeAr Denim** serves the supply-chain community.

If there is a topic you would like us to explore in a future issue, we would love to hear from you.

And if you want to stay in the loop, subscribe to our monthly newsletter **WeAr Denim Bluews**, for industry news and insights from the world of denim. You can sign up with the QR code below.
For now, we wish you good business, meaningful connections, and, as always, we hope to see you at the trade shows.

Ezequiel Cevey & Shamin Vogel
Editors

Sign up to the **WeAr Denim** newsletter:

WeAr DENIM Bluews

AN ARCHIVE BUILT BY INSTINCT

Fabrizio Amici, owner of **Blue Marlin Archive** and founder of the Blue Marlin multi-brand store in Rome, reflects on four decades of collecting, travelling, and studying denim, and the role of archives.



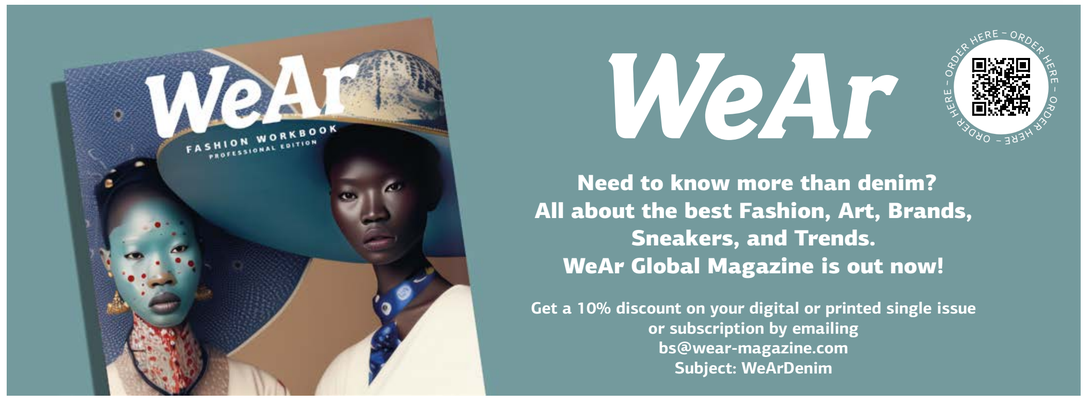


When I opened Blue Marlin in 1984, I travelled, searched, and bought what caught my eye. Some pieces I sold, some I wore, and others I couldn't let go of. The Blue Marlin Archive was never planned. It grew through thousands of choices guided more by instinct than by value. It records what I was seeing and choosing.

Throughout the Eighties and Nineties, travelling was fundamental to my work. There was no internet, so much of the research happened on the road. I was looking for things that genuinely came from American culture: workwear, military, outdoor, and denim. Jackets, canvas, leather, boots, and, of course, **Levi's**. In Italy, the 501 was already part of a generation's identity. For me, it also became something to search for. I found old pairs, genuinely worn, and studied the fabric, indigo, proportions, stitching, and traces of wear. After handling enough of them, you begin to recognize differences almost instinctively. Denim records time through the person wearing it. Today, I can place a Levi's Big E, a 501 from another period, and the **Double RL** I bought in New York in 1993 on the same table. I see different moments in the same story.

In earlier models, details we now study closely, such as selvedge, rivets, stitching, hardware, and proportions, were simply part of how jeans were made. They reflected a particular way of making garments. Double RL represents, for me, a later chapter: the moment when that culture began to be studied and reinterpreted. I found my first Double RL in New York in 1993, upstairs at the **Polo Sport** store, mixed in with genuine vintage. It was difficult to tell one from the other, so I chose the pair that looked most lived-in. Finding something new that came so close to the feeling and authenticity of original Levi's was surprising, especially in the way the denim had been aged. Back then, achieving that result involved extensive handwork. You could study how years of wear affected an old pair, but you had to work by hand to recreate those traces. Today, lasers and industrial processes can achieve precise results. Back then, it was far more artisanal.

The outline of a wallet on a back pocket. Creases behind the knees, created by thousands of movements. Indigo disappearing in some areas while remaining deep in others. A repair, an irregular stitch, a small imperfection. None of these were decorations. They exist because somebody lived in that garment. You can imitate the effect, but you cannot reproduce the cause. That is where an archive takes on its real meaning. For a designer today, access to an original means returning to the source. It allows us to witness how something was made, how it aged, what changed, and what was lost, then use that knowledge to create something new. What I chose instinctively at that time can now help us understand a culture. The history of denim must be preserved because it still teaches us. Forty years later, I keep finding answers in the archive.



SOFLAT

SOFT TO THE TOUCH.
FLAT TO THE EYE.

Denim that feels incredibly soft,
yet looks clean, flat and refined.

Engineered for comfort.
Designed for a modern and effortless look.

NATURAL COMFORT
Designed for all-day softness and ease.

SOFT TOUCH, FLAT LOOK
Soft in hand with a clean, flat finish.

Bossa

KEY DENIM TRENDS

EZEQUIEL CEVEY

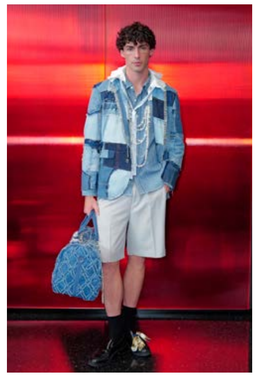
The denim directions emerging for S/S 27 and F/W 27-28 are bound by a common thread: process as connective tissue. From the rawness and controlled weathering of Denim Etiquette to the panel manipulation and contrasting washes of Reconstructed; from the lightweight and rigid constructions of Silhouette to the coatings, jacquards, and technical finishes of Unconventional Sports, process is shaping how denim is designed, constructed, and perceived.



Acne Studios

Denim Etiquette

Denim enters a more polished vocabulary, borrowing from formalwear, collegiate dressing, and traditional tailoring while retaining its inherent informality. Raw and dark indigos sit alongside washed earth tones and refined neutrals, with clean surfaces and controlled fading replacing overt distressing. **Dior** pushes the five-pocket into couture territory with fluid, oversized proportions and an embroidered denim coat layered over a formalwear combination, while **Acne Studios** revisits its 1996 jeans alongside printed and layered denim references. **Rag & Bone** incorporates denim into a more sophisticated American wardrobe, including a slim cigarette fit and tailoring-led styling. The direction extends beyond styling into finish: rigid raw denim, subtle weathering, deep indigo, tobacco, brown, and mineral tones give denim a more composed, dressed-up character



Big Ocean x Andy Yu

Reconstructed

Denim is increasingly treated as something to cut apart, combine, and rebuild. Patchwork remains central, but the direction extends into visible repairs, grafted panels, mismatched components, appliqué, and unconventional surface work. **Rentrayage** constructs a barrel-leg jean from two different vintage pairs, while **Andy Yu** explores patchwork and hybrid approaches in the Big Ocean collaboration. **Undercover** introduces wavy seams into a Type II denim interpretation, while **threeASFOUR** combines vintage jeans, archive pieces, and indigo-dyed cotton in a new denim collection built around circularity. Here, process becomes part of the visual language: Contrasting washes, raw and faded panels, exposed seams, overprinting, irregular stitching, coatings, and color shifts can make a reconstructed garment appear assembled from different denim histories.



threeASFOUR

Silhouette

The five-pocket is being stretched beyond its conventional proportions, with denim becoming a vehicle for volume, distortion, and engineered shape. The emphasis shifts from fit alone to the construction of the garment around the body, producing exaggerated legs, expanded hips, sculpted volumes, and unexpected balances between rigidity and fluidity. **Dior** transforms the outline of a conventional jean into a skirt-like silhouette through couture volume, while **Diesel** continues to distort familiar denim garments into unconventional proportions and hybrid constructions. **threeASFOUR** approaches denim through geometry and pattern engineering, including a bootcut constructed from a single pattern piece alongside new sculptural shapes. Fabric development supports the silhouette, from lightweight denim capable of draping to rigid or stiffened constructions designed to hold exaggerated forms.



Tommy Hilfiger

Unconventional Sports

Sports references are moving into denim without simply reproducing traditional athletic garments. Tennis, racing, skate, and utility codes are translated through denim proportions, construction, and surface treatments, producing garments that occupy the space between jeanswear and sportswear. **Tommy Jeans** continues to connect its denim with a sport-driven youth aesthetic, combining looser, lived-in denim with the brand's longstanding relationship with university and athletic culture. **Ferrari** approaches denim through a dark denim suit and matching separates in a monogrammed denim jacquard, bringing automotive identity into the fabric itself. Here, process is as important as reference. Coated surfaces, stiffened denim, glossy effects, technical jacquards, and treatments that resemble leather or other synthetic surfaces lend traditional denim a more engineered look.



Nature's lines. Your silhouette.





Sharp lines, natural roots. Denim made from U.S. cotton is designed to make a statement.

COTTON USA™

THE NEW DENIM MAP

Denim has always been fluid. Italy and Japan have long been major denim hubs, while other countries have invested strongly in R&D, talent, infrastructure, and manufacturing capabilities. We asked several experts in the industry which regions are key denim hubs today, what makes them relevant, and where they see the denim map moving in the future.



DR. YONIT BUSSI-GREENFELD
CHIEF SCIENTIFIC OFFICER
SONOVIA LTD.

Today, denim is a truly global ecosystem. Italy and Japan remain influential through craftsmanship, premium quality, design, and innovation, while Türkiye combines advanced manufacturing, technology, and proximity to European brands. Pakistan, Bangladesh, India, and China remain essential because of their scale, integrated supply chains, and growing investment in R&D, automation, and more responsible production. Brazil and Mexico are also relevant, with vertically integrated industries and strong access to the Americas. Looking ahead, I believe the denim map will be shaped less by geography and more by the ability to transform. Future hubs will combine manufacturing scale with R&D, skilled talent, infrastructure, and openness to new production methods. Denim leadership will emerge wherever there is a readiness to rethink how denim has traditionally been dyed and produced, while adopting innovation that is economically efficient and reduces environmental impact.



ONUR ÇINAR
SENIOR MARKETING EXECUTIVE
ISKO

Today's denim landscape is increasingly global and interconnected. Italy remains influential in design, finishing, and premium innovation, while Japan continues to set benchmarks for craftsmanship and authentic heritage denim. Türkiye is also a key hub, combining strong manufacturing capabilities with advanced R&D, flexibility, speed, and proximity to major markets. The United States remains culturally significant, while China, Pakistan, Bangladesh, and India play important roles through scale, technical development, and growing investment in responsible production. Looking ahead, the denim map will become more distributed rather than shifting toward a single region. Proximity, supply-chain resilience, traceability, circularity, and lower-impact technologies will increasingly determine which regions remain relevant.



ZEESHAN AHMED
GENERAL MANAGER, PRODUCT DEVELOPMENT
NEELA BLUE

The global denim map has expanded beyond its traditional borders, with Asia and Europe operating as the industry's twin engines through advances in technology and garment manufacturing. We are moving beyond conventional denim. Material science is integrating innovation and functionality directly into fabrics, while AI is playing a growing role in anticipating trends and consumer demand. At the same time, regional hubs face severe macroeconomic pressures. In Pakistan, we are navigating intense cost challenges, with the energy crisis and insufficient domestic cotton yields forcing reliance on expensive imports. To withstand these pressures, the future of denim must be defined by closed-loop systems and advanced technology. Ultimately, the industry rests on three pillars: traceability, technology, and predictive agility. Tomorrow's leading hubs will not simply produce the most volume, but will produce the smartest solutions.



ANDREA VENIER
MANAGING DIRECTOR
OFFICINA39

Today's denim map is less about one dominant geography and more about specialized ecosystems. Bangladesh and Pakistan are central to the global supply chain. China should not be viewed solely through the lens of its domestic market, as it remains the world's largest exporter of denim fabric. India is also gaining weight, both as a major fabric producer and through its expanding domestic market, while Türkiye remains essential for premium and agile supply into Europe. Egypt is, in my view, the most compelling emerging hub, with proximity to Europe, trade advantages, and significant new investment creating a strong foundation, although specialist skills and upstream depth are still developing. Mexico also remains strategically relevant through nearshoring and USMCA. Looking ahead, I expect greater regionalization across the denim industry, with South Asia remaining important for scale, while Europe and North America place greater emphasis on speed and proximity. Across all regions, competitiveness will increasingly depend on technology, efficiency, traceability, and resource performance.



NICOLAS PROPHTE
FOUNDER & EXECUTIVE DIRECTOR
DENIM DEAL FOUNDATION

I see the denim map being reshuffled across multiple regions, driven not only by regulation but by tariffs, buyer price pressure, and geopolitics. Türkiye, Morocco, and Tunisia are facing increasing pressure on manufacturing as costs and currency instability affect competitiveness, while Egypt is attracting significant investment to serve both the U.S. and EU markets. Pakistan and Bangladesh remain major volume hubs, although margins are under pressure. India is one to watch, with capacity growing to serve both domestic and export demand. Looking ahead, the EU's ESPR could encourage European brands and retailers to bring more production closer to home, favoring EMEA over the Far East, as proximity becomes a compliance consideration as well as a logistical one. If the economics of digital denim printing continue to improve, that shift could accelerate, with less fabric transported over long distances and more printing and finishing carried out closer to the point of sale. The regions that succeed will not necessarily be those with the lowest costs, but those with the ability to adapt.



LAURA CORNA
SALES MANAGER
ACM DETTAGLI DI MODA

In today's increasingly complex landscape, being a global partner means staying close to supply chains, wherever they are. The challenge is not only to develop high-quality products and accessories, but also to ensure consistent aesthetic and functional performance at every stage and in every market. The growth of new manufacturing hubs makes it increasingly important to support brands and local partners with technical expertise, control, traceability, and continuity throughout product development. A button, buckle, label, or leather detail must retain the same quality regardless of where production takes place. I believe the future of denim will reward those able to move with the supply chain and build an international presence.

Soko
CREATING NEW FINISHING LOOKS FOR YOUR COLLECTIONS
Soko Shadow dyeing look



CHAD DOUB
GLOBAL SEGMENT MARKET MANAGER, CASUAL WEAR AND HOME
EASTMAN

Today's denim map is shaped by hubs with different capabilities. China remains one of the largest and most vertically integrated, while Türkiye is strategically positioned for European brands and Pakistan remains important for production volume and cost competitiveness. Japan, Italy, and the U.S. continue to influence the industry through heritage, craftsmanship, and design, while Mexico is gaining relevance for the U.S. market due to its proximity and manufacturing capabilities.

Looking ahead, I see the denim map becoming more regionalized and specialized. Brands will select partners based on capabilities, proximity, flexibility, and expertise, with sustainability and circularity becoming increasingly relevant alongside manufacturing and innovation.



PANOS SOFIANOS
DENIM CURATOR
BLUEZONE

The next big theme is circularity. Therefore, we can no longer talk about a single epicenter. All geographical areas will have to join this technological pursuit and automatically become the next hubs of denim evolution. We are witnessing enormous, almost metaphysical intelligence driving our civilization forward. The next steps are, quite literally, unpredictable. So, may the good denim force be with us. Our show, **Bluezone**, curates these latest tendencies in a pioneering effort.



FLORIAN GONSER
CEO
GONSER GROUP

Denim has always been fluid, and I believe the map continues to evolve. Italy and Japan remain two important denim hubs, although they represent very different approaches. Looking ahead, I see China as the most exciting future hub. The denim landscape is changing, and China will play an increasingly important role in shaping the industry's next phase.



WOUTER MUNNICHS
FOUNDER
LONG JOHN

I believe the denim map today is more diverse, global, and interconnected than ever before. Looking ahead, I don't see one region replacing another. Instead, the map will become more specialized, with the strongest hubs combining innovation, sustainability, speed, skilled talent, traceability, and vertical integration. The regions that stand out will be those able to connect fiber, fabric, garment manufacturing, laundry, and finishing with technology and creativity, while delivering greater transparency and lower environmental impact.



JULIO PERALES
PRODUCT/TECHNICAL MANAGER INDIGO-SULPHUR
ARCHROMA

While heritage markets such as Italy and Japan continue to influence denim through craftsmanship and innovation, much of the industry's current momentum is coming from Bangladesh, Egypt, and Vietnam. Bangladesh has established itself as a sophisticated denim ecosystem, combining scale and technical expertise with a growing focus on responsible manufacturing. It is no longer viewed simply as a production base, but as a strategic partner in product development and sourcing. Egypt is another market to watch, as its geographic position between Europe, Africa, and the Middle East, together with investment in textile infrastructure, is creating opportunities for vertically integrated denim production. Vietnam has strengthened its position through agility, quality, and international trade connectivity, making it attractive for brands diversifying their supply chains. I believe the denim map will be shaped by sustainability, innovation, speed, and resilience.



S/S 28 EXHIBITIONS
KINGPINS AMSTERDAM
14/15 OCTOBER 2026;
DENIM PREMIERE VISION MILAN,
25/26 NOVEMBER 2026;
MUNICH FABRIC START BLUEZONE,
20/22 JANUARY 2027.

sharabati-denim.com

APPLE STORE
GOOGLE PLAY

S*S 28

More is more.
More color. More texture. More possibilities.
Modern or heritage. Smart or easy-chic.
A collection built on versatility, individuality
and the freedom to take every direction.

SHARABATI



SINA STEIDINGER
SUSTAINABLE DENIM DESIGNER

The denim map is shifting. Perhaps we need to rethink what a hub actually is. It can be a place, country, or network. New hubs may be decentralized areas like local stores, studios, and small ateliers, where denim artists experiment and challenge conventions. Today, Tunisia is an important denim hub, bringing together developers, manufacturers, and technical expertise from sample to production. Its strength lies in this concentration of skills, increasingly combined with sustainability management and more responsible production. A hub can also be an entire ecosystem. Brazil, with its own cotton supply and vertically integrated mills, demonstrates the potential of controlling the chain from fiber to finish. **Denim City São Paulo** adds education and community. Denim has always been fluid. The next hub may be less a place than a new way of connecting knowledge, creativity, and responsibility.



JAY WOO LEE
TNC DENIM LEAD
HYOSUNG

Today, Türkiye, China, and Pakistan stand out as key denim hubs, each with distinct strengths. Türkiye benefits from its proximity to Europe and a well-integrated textile supply chain. China remains highly relevant through its manufacturing infrastructure, innovation, and ability to develop a wide variety of products. Pakistan combines a strong cotton base with vertically integrated production and competitive manufacturing capabilities. Looking ahead, the denim map will be shaped not only by cost and scale, but also by innovation, sustainability, supply-chain transparency, and proximity to key markets. Regions able to combine these capabilities will become increasingly important to the global denim industry.

VANCE ZHANG
GENERAL MANAGER
WINWIN TEXTILE

Denim production hubs may appear increasingly dispersed, but several factors continue to shape their position: integrated supply chains, technical expertise, response times, and the ability to meet requirements around carbon and traceability. Asia remains the main production base for volume and speed, while Italy and Japan retain strong positions in areas requiring specialized manufacturing and product development. Türkiye, North Africa, and Latin America are also gaining relevance as proximity, market access, and changing trade conditions become increasingly important alongside production costs. The denim supply landscape is likely to continue shifting as brands reassess sourcing according to proximity, trade conditions, delivery times, and environmental requirements. Traceability, emissions data, and supply chain transparency are becoming increasingly relevant alongside production capacity.



STEVE MAGGARD
PRESIDENT
CONE DENIM

While low-cost global denim hubs remain important and will continue to play a key role, I am encouraged by the renewed focus among U.S. brands on the Mexican supply chain. As trends can change quickly, brands need to react to shifts in washes and silhouettes. They are recognizing the value of Mexico's speed, agility, tariff advantages, and proximity to the U.S. market. There is also an opportunity to improve financial flexibility by avoiding millions of dollars in working capital tied up in garment inventory shipped from overseas, often for weeks at a time.







EIJI SAKAMAKI
GENERAL MANAGER
YKK EUROPE

Europe remains central to the denim industry, particularly because of its influence on fashion-led jeanswear. Although denim is designed and produced worldwide, which regions truly shape its creative direction? Amsterdam has established itself as a strong contender for Europe's denim capital, bringing together leading industry resources with a community of young professionals and students. Many emerging talents draw inspiration from denim's culture and heritage while looking to define future trends. Brazil is another market of interest, distinguished by its own aesthetic and ability to balance strong design with accessible pricing. From a manufacturing perspective, Egypt has emerged as an increasingly important denim production hub, and its presence in the global market is likely to expand.



ARMAN MALIK
CHIEF INNOVATION OFFICER
MASTER TEXTILE

Italy and Japan have long been major hubs for denim and fashion, and I believe they will continue to hold significant influence. However, the global landscape is evolving. In Asia, I see South Korea becoming increasingly important as a trendsetter, particularly among younger consumers. K-pop has built significant global influence across fashion, beauty, and lifestyle, while Korean skincare has also demonstrated the country's ability to build globally desirable brands. On the manufacturing side, Pakistan has strong potential to further strengthen its position as a global denim hub. Its vertically integrated textile industry, established denim expertise, and competitive manufacturing base make it an attractive sourcing destination. Türkiye and Egypt are also becoming increasingly relevant to European sourcing due to their geographic proximity. Ultimately, I believe future denim hubs will be shaped by cultural influence, manufacturing capabilities, speed to market, and the ability to adapt to changing consumer trends.



VINCENT QIN
MARKETING DIRECTOR
DYNAMIC DENIM

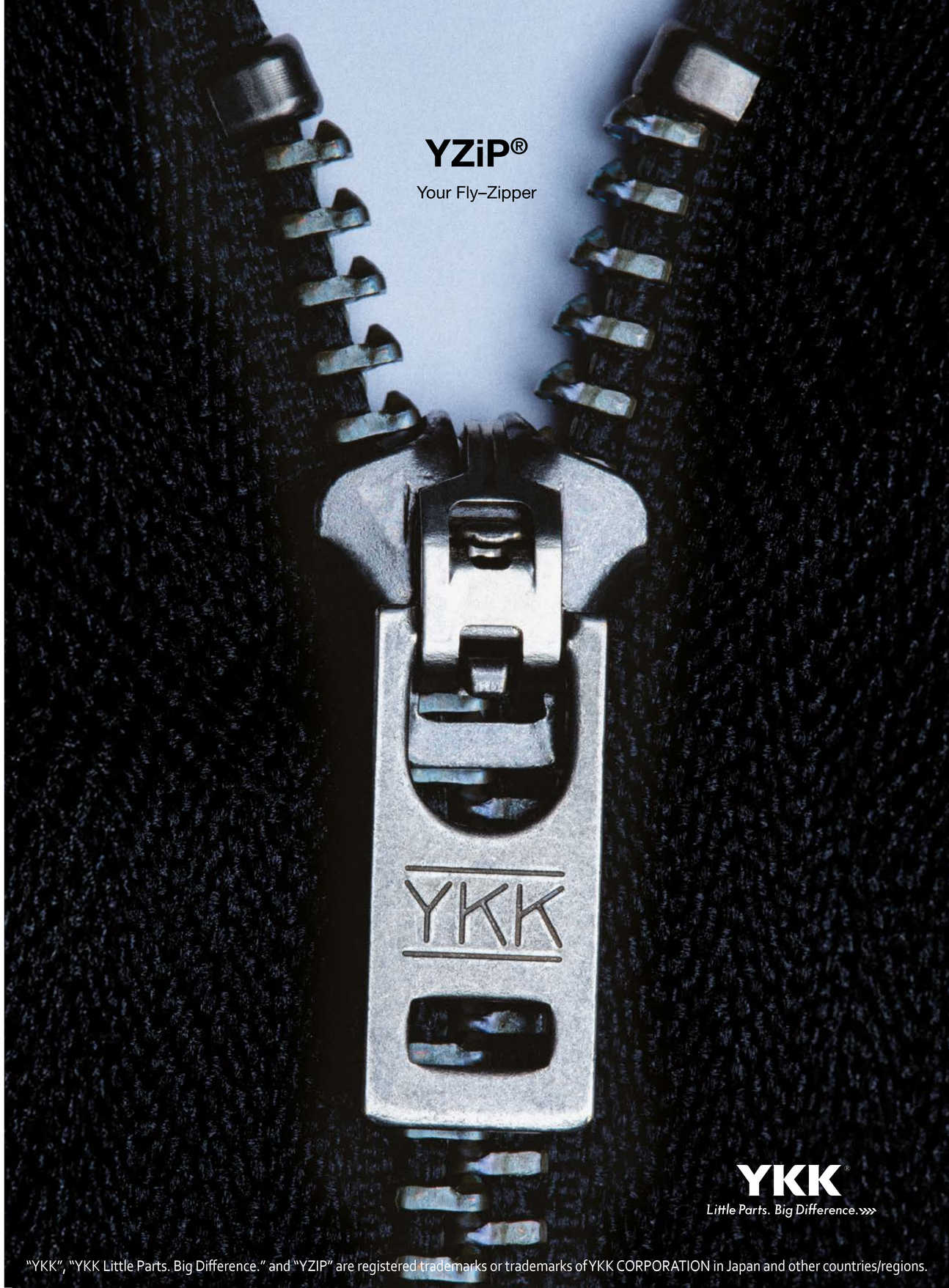
Over the past five years, China's denim innovation has been remarkable. Our industry's resilience was forged in a highly polarized market. We are investing in traditional selvedge denim and bio-based dyes, while building an innovative closed loop with domestic brands and consumers through online sales. Dynamic Denim is a prime example. Backed by a robust supply chain, we are attracting European talent while developing a deeper understanding of how Japan's concepts of Wabi-Sabi and Mono no Aware are integrated into denim. By combining these cultural insights with China's business models and advanced technology, we believe we are well-positioned for the future. In the next five years, some of the most interesting innovations in global denim will come from China.



TRICIA CAREY
CHIEF COMMERCIAL OFFICER
AVALO INC.

Denim has never lived in one country. Italy, Japan, and America built the foundation, but look at what's developing in Los Angeles and New York: brands designing straight off the street and using social media to drive demand. They are sourcing materials from regions built for innovation and small production runs, using deadstock or upcycled denim. That's the shift. The next hubs won't win on scale alone. They will win on proximity, speed, and flexible minimums. Relevance is now defined by tech convergence, AI-driven design and forecasting, lower-impact fibers, and regenerative agriculture. The denim map is moving toward smaller, smarter ecosystems, where local creativity meets global sourcing. Look to the regions blending craft with technology. That's where the future is being made.





MATERIALS IN TRANSITION:

WHAT'S NEXT FOR FASHION & PERFORMANCE

PERFORMANCE DAYS



For F/W 28-29, materials are being asked to do more. As climate conditions shift, fashion and performance are responding with new fibers, constructions, and technologies that bring together aesthetics, functionality, comfort, and material responsibility. These developments will be presented at **PERFORMANCE DAYS** in Munich in October. For the coming season, four key directions, defined by a jury ahead of the show, are in focus: Elevated Cotton, Made to Last, Ultra Light Nylon, and Technical Wool.

Elevated Cotton gives familiar cotton surfaces a technical dimension through dense constructions, treatments, bonding, and membranes. Made to Last draws on workwear and military influences, with durable constructions, high-tenacity yarns, and fabrics designed to age well. At the opposite end of the spectrum, Ultra Light Nylon explores airy, lightweight qualities made from ultra-fine yarns down to 5 denier. Technical Wool combines wool's natural character with three-layer constructions, laminates, insulation, and performance finishes.

"The boundaries between fashion and performance are becoming increasingly fluid. Technical materials can inspire completely new fashion applications," says Viktoria Strehle, Head of Visitor Management & Fashion Relations at PERFORMANCE DAYS. Fashion now has a dedicated category within the show's Trend Forum, curated in collaboration with **Diesel**.

The fiber landscape is broadening as well. Cotton remains important, while hemp, linen, and other natural fibers are developing alongside man-made cellulosic fibers such as lyocell and modal. Engineered structures, lightweight constructions, and technical finishes are further expanding the options available to designers.

PERFORMANCE DAYS, October 13-14, 2026, Messe Munich, Halls A4-A6, performancedays.com

THE FUTURE OF TEXTILE COLORING



Photo Credit: Nuno Vilhadas

Texpertise by **Messe Frankfurt** looks at how textile coloring is changing, from microorganisms to carbon dioxide. Dyeing accounts for around 20% of global industrial water pollution, while new technologies aim to reduce water, energy, and chemical use.

Bio-based dyes are emerging from microorganisms, algae, and plant pigments. **Zeefier** turns algae and waste streams into natural textile dyes without freshwater or pesticides. **Post Carbon Lab** uses microorganisms to convert CO_2 into dyes and reports 97% less water use in a CO_2-negative process. **Colorifix** uses microbial systems that allow companies to produce dyes in-house.

Waterless dyeing is advancing as well. The Indian technology **SUPRAUNO** replaces water with supercritical CO_2, while at **Texworld Apparel Sourcing Paris**, **PigmentOCO** won the **Avantex** Fashion Pitch 2026 with a supercritical CO_2 process for natural fibers such as cotton. **EverDye** dyes at room temperature without petrochemicals, using ten times less energy and operating five times faster, according to Texpertise.

Color can also come from waste. The Portuguese research project be@t, developed by **CITEVE**, **CeNTI**, and **Lameirinho**, produces water-based printing pastes that are more than 94% bio-based. Binders are derived from food-industry by-products, collagen, and chitosan, while pigments come from ground vine prunings, pine bark, and boiler ash. The pastes are compatible with rotary screen printing, and the project won the **Techtextil** Innovation Award 2026 in the category New Chemicals & Dyes.





DENIM IN TRANSITION



WeAr Denim spoke with Sedat Süalp, **DNM Denim** Deputy General Manager, about the changing structure of the global denim supply chain, the role of regional production hubs, vertical integration, and the industry's approach to resource management and innovation.

How do you think the structure of the global denim supply chain is changing?
The global supply chain is shifting away from fragmented international connections toward more efficient regional hubs. Our recent investments, including the major expansion of our factory in Egypt's Damietta Industrial Zone, reflect this transformation. Combining Turkish capital and management with Egypt's strategic trade position allows us to export our production efficiently while reducing our supply chain's exposure to the vulnerabilities and risks associated with global maritime transport. We are seeing a form of regionalization that goes beyond simply relocating machinery. It also means transferring and sharing knowledge. Operating in Egypt with Turkish expertise is an important part of our model. The role of super-hubs, offering geographical proximity to core markets such as Europe and the U.S., advantageous trade agreements such as QIZ, and greater security around energy and resources, is likely to become increasingly important in the years ahead.

How important will vertical integration and geographical proximity become?
In today's market, brands demand three core qualities from their suppliers: speed, traceability, and flexibility. In this context, vertical integration and geographical proximity are no longer simply preferences. They have become critical competitive advantages. Vertical integration allows us to maintain close control over every stage of our production processes and respond quickly to brands' last-minute requests or collection changes.



At the same time, it provides end-to-end traceability, which is increasingly important as sustainability requirements become more demanding. When this is combined with geographical proximity and our strategic production hub in Egypt, we can reduce exposure to global logistics risks and supply chain disruptions while providing faster and more reliable service to our customers in Europe. Using Egypt's QIZ framework also provides tariff advantages for the U.S. market, while reducing our dependence on Far Eastern supply and exposure to long-distance logistics. This structure is fundamental to achieving sustainable growth in the denim market.

Please tell us about DNM's latest and most significant innovation.
That would be the advanced wastewater recovery infrastructure we have implemented across our production plants. We integrated this investment into our renewed corporate identity for our 15th anniversary, including the water drop in our logo as a visual representation of our focus on environmental responsibility. While many producers are focused on gradually reducing water consumption, treating wastewater, and returning the recovered water to production processes remains a significant challenge. The wastewater recovery facility we have established addresses this structural issue by moving water away from a linear model of consumption toward a closed-loop system.

Where do you think the industry's sustainability conversation is becoming too focused on incremental improvements, and what problem should it be addressing instead?
At DNM, we believe sustainability requires macro-level engineering. Our Zero Liquid Discharge (ZLD) closed-loop treatment facility is one example of this approach. We are not simply reducing water use. We are eliminating the discharge of industrial wastewater and treating 100% of our production wastewater for reuse in the manufacturing process, achieving a total water recovery rate of 90.2%. We believe this points toward a broader objective for the industry: developing factory ecosystems in which resources are kept in circulation for as long as possible. The next fundamental step for denim should be a broader transformation of resource use. In addition to advanced wastewater recycling, we have restructured our energy system through the use of natural gas, advanced cogeneration systems, and solar power. The industry needs to move beyond product-level improvements and place greater emphasis on infrastructure investments, including comprehensive water recycling and cleaner energy integration, as part of a long-term approach to resource management.





INTERVIEW

THE VALUE OF COTTON

WeAr Denim interviewed Liz Hershfield, Executive Director of **COTTON USA™** and Director of the **U.S. Cotton Trust Protocol**, about the role of U.S. cotton in denim, and the future of cotton innovation.



In a globalized denim supply chain, what does "COTTON USA" actually mean, and what difference does its origin make?

Origin matters because the fiber you start with influences everything downstream, from spinning and weaving to dyeing, washing, and finishing. COTTON USA is about more than where the cotton is grown. It represents U.S. cotton and the quality, consistency, transparency, and technical expertise behind it. For mills, high-quality U.S. cotton can mean more predictable performance, greater efficiency, and superior quality. For brands, it provides greater confidence that the products they develop can be reproduced consistently at scale.

Cotton remains one of the most widely used natural fibers, but it also faces competition from synthetic and alternative fibers. Where does cotton still have an advantage?

Cotton gives denim its character. It delivers the durability, comfort, breathability, and versatility consumers expect, while developing a distinctive look and feel that gets better with wear. Synthetics can play an important role when stretch or specific performance attributes are needed, but cotton remains the foundation of denim. Its biggest opportunity for growth lies in continuing to improve in areas such as stretch, moisture management, and sustainability, where consumers increasingly expect denim to deliver both comfort and performance.

How does the choice of cotton influence the look, feel, and durability of denim?

The choice of cotton influences denim long before you see the finished fabric. Fiber characteristics such as strength, length, and consistency influence how a yarn can be engineered and, ultimately, how the fabric looks, feels, and performs. Those characteristics are also among the clearest indicators of cotton quality. Brands and mills often evaluate factors such as fiber strength, staple length, and uniformity because they provide insight into how consistently the cotton can be processed throughout spinning, dyeing, and fabric manufacturing. This is particularly important in denim, where yarn and fabric construction, including intentional texture and character, are an important part of the design. Starting with consistent, high-quality U.S. cotton gives mills greater control over these characteristics while reducing variability throughout production.

Where do you see the main economic pressures in denim, and how can COTTON USA help address them?

The pressures are familiar: tighter margins, uncertain demand, inventory risk, speed, and, importantly, the cost of getting quality wrong. A lower input cost does not necessarily translate into a lower total cost if variability creates inefficiencies, waste, rework, or quality issues downstream. Through COTTON USA SOLUTIONS®, our technical experts work directly with mills to optimize their use of U.S. cotton. We provide hands-on support with spinning performance, processing efficiency, and quality management, helping to improve productivity while reducing fiber loss, waste, and operational costs. The combination of consistent fiber quality and technical expertise can create measurable value at the mill. Efficiency upstream matters because inefficiencies early in the process can quickly lead to higher costs and greater pressure further down the supply chain.

How has your experience working on the brand side shaped the way you think about cotton today?

Having spent more than 30 years on the brand side with companies including **Bonobos**, **J.Crew**, **Madewell** and **Old Navy**, I have seen how many decisions have to come together to create a great product. You are constantly balancing quality, cost, speed, consistency, and, ultimately, the customer experience. That has shaped the way I look at cotton today. Brands need more than a good story. They need reliable quality, traceability, and confidence that what they develop can actually be delivered consistently at commercial scale. U.S. cotton provides a solution that can help build that confidence and keep customers coming back.

What key developments do you expect in cotton over the next few years?

I think we are going to see a much more intentional approach to fiber and fiber blends. Brands are looking more closely at what each fiber contributes to a product, be it stretch, strength, comfort, or another performance attribute. For denim, that creates a real opportunity for cotton. Innovation in yarns, fabric construction, and finishing continues to expand what cotton can do. At the same time, better data and traceability are giving brands greater insight into the origin and production of their fiber. Advances in technology and precision agriculture, such as sensor-driven irrigation, GPS-guided equipment, and data analytics, will continue to help U.S. growers improve productivity and resource efficiency. The opportunity is to connect innovation at the farm level with innovation at the product level. This can help create denim that performs while giving brands and consumers greater visibility into what it contains and where it comes from.

GUEST COMMENT

PP-FREE IS ONLY THE BEGINNING

DR. CHRISTOPH HENDEL, **RUESS GROUP**



Denim finishing has always involved a contradiction. Considerable industrial effort goes into creating the appearance of wear, from fades and abrasion marks to more pronounced bleaching effects. Some of the chemistry used to achieve these results also presents challenges for worker safety and wastewater management. Potassium permanganate, commonly referred to as PP, remains widely used for local bleaching because it is effective, relatively inexpensive, and capable of creating reproducible effects. Under European chemicals legislation, it is classified as very toxic to aquatic life, with long-lasting effects, and as suspected of damaging the unborn child. It can also cause severe skin burns and eye damage, making worker exposure an important consideration in spray applications.

There is also a less visible consequence. When potassium permanganate oxidizes indigo during denim finishing, manganese dioxide can form and deposit on the garment. Neutralization can reduce this into soluble manganese compounds, which then need to be managed through wastewater treatment. The exact chemistry depends on the reducing agent and treatment conditions, but removing PP from the garment does not necessarily mean removing manganese from the production system.

"Beyond Potassium Permanganate: Perspectives for More Responsible Denim Finishing", a report published through the PP-free Denim Initiative, estimates annual global consumption of potassium permanganate for denim finishing at approximately 1,963tn. The figure is an extrapolation based on assumptions including global jeans production, the proportion undergoing PP spray bleaching, application volumes, and average concentration.

The PP-free Denim Initiative, operated by **Ruess International GmbH** in partnership with **CHT Germany GmbH**, approaches the issue from this broader perspective. CHT contributes technical expertise and application knowledge in PP-free denim processing, including its organIQ seek system, which the company positions as an alternative to potassium permanganate for local spray bleaching.

But replacing PP should not become another simplified sustainability claim. A process labelled "PP-free" is not automatically lower-impact. Replacing one chemical with another can simply shift the problem elsewhere. The next stage of denim finishing will require scrutiny across the entire process, from process performance, worker safety, and wastewater management to resource use, material quality, and commercial scalability. Ultimately, claimed improvements must stand up to real production conditions.

PP-free may be an important step. It should not be the end point.

INTERVIEW

THE INTEGRATED MODEL



WeAr Denim spoke with Christian Reca, Worldwide Marketing & Merchandising Manager at **Pioneer Denim**, about Bangladesh's evolving denim capabilities, vertical integration, innovation, and the balance between production scale, quality, and environmental impact.

From your perspective, what has improved most in Bangladesh's denim capabilities?

Bangladesh has evolved from a volume-driven manufacturing base into a more advanced center for product development and material innovation. At Pioneer Denim, we foresaw this shift and moved our focus toward customer-centric product engineering rather than static product catalogs. One of the country's greatest advances has been its ability to develop more complex fabric constructions, precise fiber blends, and advanced processing technologies. Instead of simply executing standard orders, we are increasingly working as strategic partners, developing tailored solutions for global brands.

How does your level of integration change the way you compete internationally?

Our vertical integration is one of our key strengths in international markets. By controlling the different stages of production internally, from fiber selection and yarn composition through weaving, laundry, and garment packaging, we have greater control over quality and supply chain transparency. For our clients, this also provides greater agility. We can rapidly develop bespoke fabrics, optimize production lead times,



and respond to specific technical requirements without relying on multiple third-party suppliers. Keeping more of the production process within our own organization also reduces transportation requirements and their associated environmental impact. This level of integration gives us greater control over the development and production of tailored denim solutions.

At your scale, where does innovation actually happen?

It happens at the intersection of R&D, production, and vision. A clear example is our Australian Merino wool project. Our founder, Mr. Mohiuddin Ahmed, visited several wool suppliers in Australia, strengthened those partnerships, and worked on cotton blends by providing technical guidance on fiber-blending parameters. This led to the development of our Wool Denim product range. Our production team then took those specialized yarns from development into consistent commercial production, including both premium denim and technical stretch variants. For us, innovation is about taking new material concepts from development through to reliable execution on the factory floor.

What capabilities do you believe will determine which suppliers remain competitive as the market evolves?

As Asian manufacturing becomes more sophisticated, staying competitive will require process innovation, supply chain digitalization, and a clear sense of product purpose. Buyers are looking for authenticity, differentiation, and products with a clear reason for being. The distinction between a conventional vendor and a strategic partner will increasingly depend on the ability to engineer customized and traceable fabrics using materials such as certified organic cotton, recycled fibers, and technical blends. Our technologies support greater operational precision, but our approach also focuses on combining material performance with social and environmental responsibility. We believe technical development should be connected to the people and communities around our Habiganj operation.

Large-scale production brings advantages, but also demands considerable resources. How do you approach the balance between increasing capacity, maintaining quality, and reducing the environmental impact of production?

We view scale, quality, and sustainability as interconnected objectives rather than separate priorities. Our vertically integrated facility reduces the need for transportation between different stages of production, while investments in machinery and internal laundry systems allow us to increase efficiency and reduce resource consumption. We also focus on technologies and processes that reduce water use and avoid harmful chemicals. Quality is supported by digital traceability across the production process, from raw fibers to finished garments. For us, responsible growth means improving technology and production efficiency alongside capacity, rather than simply expanding output. Our approach to renewable energy in denim production is reflected in our motto: "Make blue, think green".



RETHINKING STRETCH



WeAr Denim spoke with Ebru Ozaydin, Global Product Category Director for Denim, Wovens & Ready-to-Wear at **The LYCRA Company** about the changing geography of denim, the industry's challenges around durability and circularity, and the next generation of stretch technologies.

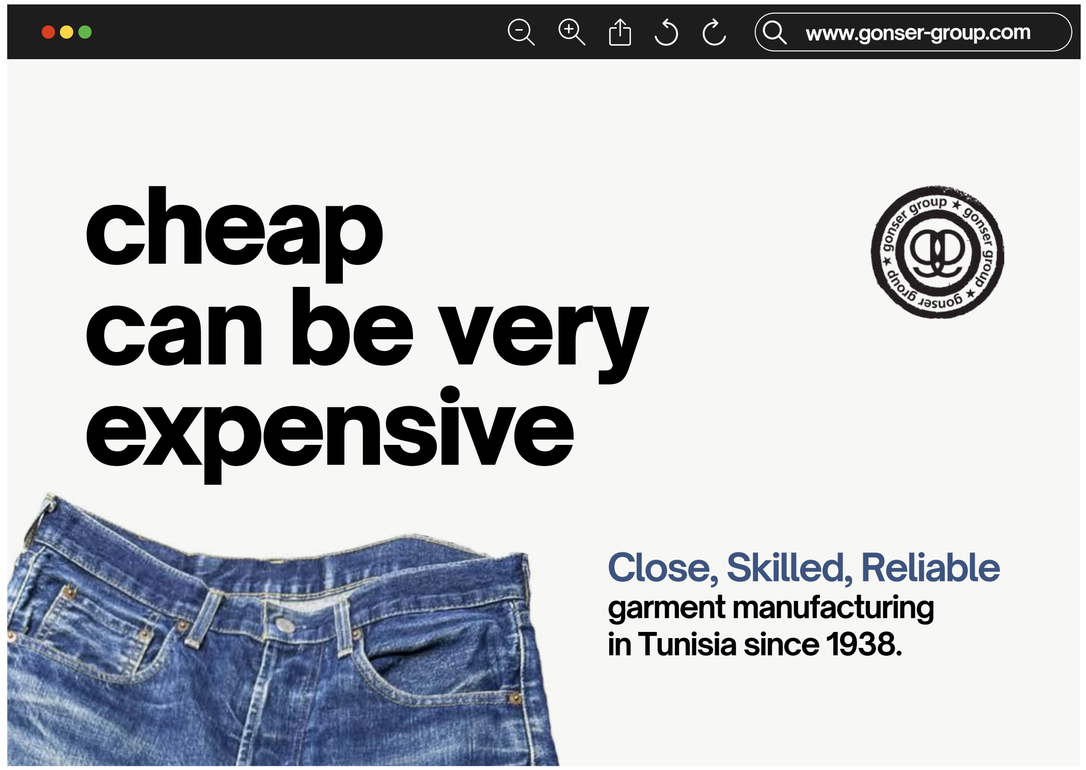
What changes in the geography of denim do you see having the biggest impact on the industry?
The denim map is not simply shifting; it is recalibrating. For years, the industry was driven mainly by volume and cost. Today, the conversation is increasingly about value: speed, resilience, innovation, traceability, and the ability to serve different consumers in different regions. India, for example, is no longer simply a manufacturing base. It is becoming an important denim market, with young consumers who want comfort, confidence, and style in the same garment. As a result, innovation must perform beyond the laboratory. It needs to deliver proven results throughout the denim production process, from fabric development and laundry to the finished garment. Ultimately, fiber technology proves its value by creating denim that looks good, performs well, and stands up to repeated wear and washing.

Which challenges do you think the industry is still facing, and what needs to change?
The industry needs to move faster on durability, circularity, and credible communication. Performance attributes such as recovery, shape retention, and garment integrity can all help extend a garment's life. Circularity remains a significant challenge, particularly for stretch denim, where complex, multifiber constructions can make recycling more difficult. Meaningful progress will depend on collaboration across the entire value chain, from fiber producers and mills to laundries, brands, recyclers, and technology partners. Clear, evidence-based communication is equally important. Sustainability claims must be specific, measurable, and supported by credible data, with a clear distinction between claims relating to the fiber, fabric, and finished garment.

How do you see stretch denim evolving as the industry seeks to balance performance with new sustainability and circularity requirements?
Stretch is returning, but not as it was before. Today's market is defined by multiple trends coexisting: straight and slim fits are gaining momentum, while relaxed, loose, and wider silhouettes remain relevant. This diversity of fits, fabric constructions, and compositions requires a more sophisticated approach to stretch. The next phase will focus on smart stretch rather than simply more stretch, with the right level of mobility, recovery, shape retention, and comfort engineered for each silhouette. Stretch may be highly visible in one garment and almost invisible in another, but its role in fit and performance is increasingly important. LYCRA® VINTAGEFX technology delivers authentic vintage aesthetics with modern comfort and recovery; LYCRA® ADAPTIV fiber provides greater fit flexibility and soft, easy stretch with less restrictive compression; and LYCRA® FitSense™ technology offers targeted stretch and support.

Will the next phase of denim be driven by new technologies, or by adapting and scaling existing ones?
Both will play an important role, but the greatest immediate impact will come from scalable technologies that can be integrated into existing supply chains. Denim production involves multiple stages, and innovation must perform consistently throughout the process while delivering clear benefits in the finished garment. This makes drop-in solutions particularly valuable. Renewable LYCRA® fiber is designed to reduce reliance on fossil-based inputs while delivering stretch and recovery performance comparable to traditional LYCRA® fiber. Mills and brands can therefore adopt it using familiar fabric constructions, manufacturing processes, and garment designs. Established technologies will also continue to evolve in response to changing consumer preferences. LYCRA® VINTAGEFX technology, for example, enables authentic, heritage-inspired denim aesthetics while providing controlled comfort stretch, recovery, and shape retention.

What developments today do you think will shape how denim is perceived five years from now?
Consumers may not discuss fiber technology directly, but they will judge denim by how it feels, how well it retains its shape, and how long it lasts. Renewable and recycled inputs are changing material development, while advances in yarn and fabric engineering are delivering the stretch, recovery, drape, and stability required for different denim aesthetics. Our technology helps mills and brands translate these technical advances into benefits consumers can experience. Data will also become increasingly important. Brands need traceable materials, credible evidence, and clearly defined claims. The strongest denim innovations will combine authentic aesthetics with measurable performance and substantiated sustainability benefits.





IAN BERRY

Renowned contemporary artist Ian Berry has recently presented his Secret Garden work, a captivating installation crafted entirely from reclaimed denim, at ENTER Art Fair in Copenhagen. From a distance, the scale, colour, and imagery drew visitors into the booth, and only on approaching did they realise it was all made from reclaimed denim. Intricate cutting, layering, and incredible detail were apparent in each piece. Ian's next big project will be for the Further Triennial in San Francisco in March 2027. This is a major new contemporary art exhibition spanning over 80 venues across Northern California. lanberry.org

THE FABRIC WITHIN



WeAr Denim spoke with Kevin Bardsley, Managing Director of **Copen Europe**, about shifting sourcing patterns, the evolving role of suppliers, and the pressures reshaping the wider denim and apparel supply chain.

Copen has been part of the denim supply chain for decades. What changes have had the greatest impact on the way you operate in recent years?
The post-COVID period has transformed much of the textile industry, particularly the way materials are sourced, planned, and developed. Restrictions on cotton origin have had a significant impact on how we operate and develop our products. This is aligned with a continued focus on sustainability, which is expanding into areas such as regenerative cotton and yarn made from post-consumer waste.

As brands look for flexibility, shorter lead times, and regional sourcing options, how is this changing the role of suppliers?
The current environment is extremely challenging for many suppliers. Reduced orders, inconsistent forecasting, and limited regional supply options are among the key factors contributing to the downturn. Copen's long-term strategy has been to expand its global sales and distribution presence while offering regional supply solutions. This is supported by consistent quality, fabrics with strong sustainability credentials, and a robust system of transparency and certification. As a result, we are seeing more brands looking to consolidate their sourcing around suppliers that can meet these requirements.

What is changing in pocketing today? Are brands and designers asking for something different?
As pricing pressures intensify for denim brands, we are seeing fewer creative developments in pocketing. This means fewer printed and yarn-dyed designs, with greater demand for basic, competitively priced options. Pocketing remains an important element of the denim garment. Like denim itself, it must withstand a range of wash treatments. However, designers and buyers need to recognize that price and performance do not always go hand in hand. Choosing purely on price can ultimately compromise the quality of the finished product.

What is the biggest concern for the denim and apparel industry that needs to be addressed?
The biggest challenges today are driven more by global factors than by specific textile issues. Over the decades, the textile industry has demonstrated its resilience in navigating obstacles, from child labor concerns to sustainability legislation. In each case, the industry has developed new ideas, solutions, and approaches. Today, we are facing a different set of global pressures, including wars, tariffs, and political uncertainty. These are affecting the industry in a number of ways, from logistics and material costs to global trade.

Looking ahead, will the denim supply chain become more global, more regional, or a combination of both?
I expect the denim supply chain to become a combination of global and regional sourcing, as no single supplier can meet every requirement. Transparency around sustainability will be an increasingly important driver, with brands seeking partners that can demonstrate genuine credibility in this area. Where possible, brands will consolidate product sourcing and development while maintaining competitive pricing. At the same time, they will need suppliers that can provide creative seasonal support.



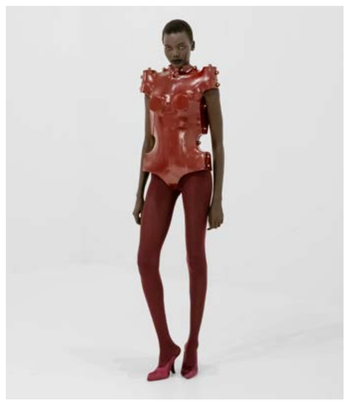
THE HUMAN SIDE OF THE MACHINE

EZEQUIEL CEVEY

Fashion technology is often presented as a race toward automation. As AI, 3D simulation, robotics, and digital manufacturing become increasingly capable, however, they are not necessarily replacing creative expertise. Instead, they are giving designers new ways to translate an idea into a physical garment. In the seasons ahead, that relationship is becoming increasingly consequential.



G-Star RAW



Jean Paul Gaultier



Jeanologia

Imagine

AI's more significant development lies in its ability to become part of an actual design workflow. In 2023, **G-Star RAW** demonstrated an early version of this process with its AI Denim Cape. The design team used Midjourney to generate the initial concept, then brought the image to the brand's Amsterdam atelier, where patternmakers and tailors worked out how to construct a garment that had never existed as a conventional sketch or pattern. The result revealed both the potential and the limitation of generative AI: the machine could propose unexpected forms, but human expertise was required to interpret and manufacture them. Three years later, the relationship is becoming more specific to denim finishing. **Jeanologia**'s BILLY is an AI system designed to extract laser designs from images. A photograph of worn vintage denim can be analyzed and converted into a laser-ready design, allowing the visual information contained in an existing garment or reference to enter a digital finishing process. Rather than generating an image for inspiration, the system translates an observation into a production tool. This may be the more consequential role for AI in denim: translating what the designer sees into something a machine can execute.

Simulate

3D design is no longer experimental software in fashion. The technology allows patternmakers to construct, fit, and simulate garments digitally, while fabric properties can be measured and incorporated into the virtual environment. **CLO**'s current simulation tools allow designers to evaluate drape, stretch, and fit using measured fabric properties, while its AI tools can also generate and edit garment imagery and virtual try-ons. For denim, this matters because fabric, fit, wash, and construction are inseparable. **Crystal Denim**, working with **Browzwear**, integrated digital denim fabrics into its 3D workflow and reported a reduction of more than 75% in physical samples. Jeanologia's eDesigner platform connects designers, wash developers, brands, and manufacturers, using digital twins to create hyperrealistic denim finishes and virtual collections. Approved designs can then be transferred digitally to production. Jeanologia reports that eDesigner can reduce physical sampling by up to 80%. A significant proportion of design decisions can now happen before material is cut, washed, or even shipped.

Build

What happens when the manufacturing method becomes part of the design language? Digital design becomes more radical when the machine does not simply reproduce a conventional garment, but changes how the garment itself can be constructed. **Sculpteo**'s collaboration with **Jean Paul Gaultier** demonstrates this at the couture end of the spectrum. For one sculptural piece, individually 3D-printed PA12 elements were produced and assembled by hand; another used a custom 3D-printed TPU structure to create a lightweight, flexible form. The technology provided geometries and structures that could then be interpreted through traditional couture craftsmanship. In denim, **unspun** began with digitally generated, custom-fit jeans and has now moved further toward manufacturing itself with **OneWeave**, its automated 3D weaving technology. In July 2026, unspun announced a $32 million Series B investment to expand deployment of the technology with apparel manufacturers and brands. The ambition is to produce three-dimensional garment forms directly from yarn, fundamentally changing the relationship between digital design, material consumption, and garment construction.

Make

The final frontier is the factory itself. Sewing has historically been difficult to automate because fabric is flexible, deformable, and constantly changing shape. A recent project involving **Sewbo**, **Levi Strauss & Co.**, **Siemens**, **Saitex USA**, and **ISAIC** demonstrated robotic sewing of complex three-dimensional operations, including side seams and front and back rises. The ARM Institute reports that the resulting system made more than 50% of jeans assembly operations technically addressable through automation. Further ahead, **AITU** and **Jack Technology** are exploring AI-enabled humanoid robotics for apparel manufacturing. AITU has demonstrated autonomous sewing operations with a humanoid robot working alongside a Jack sewing machine, while Jack Technology is working with Siemens to integrate industrial AI, digital engineering, and humanoid robotics into sewing environments.

The human remains in the loop

AI can interpret an image. 3D can test a garment. A laser can reproduce a visual effect. A printer can create a structure. A robot can execute a difficult seam. Yet every stage still depends on decisions about what should be made, what should be changed, and what is worth producing. For denim, where design is inseparable from tradition, fabric behavior, construction, washing, finishing, and physical experience, this human-machine relationship could become one of the industry's defining creative symbiosis. The future may belong not to those who replace human expertise with technology, but to those who understand how to make these new tools part of the creative process.



THE COTTON OPPORTUNITY

ANATT FINKLER

For all the innovation that has transformed fibers in recent years, denim has remained, at its core, a cotton story. No synthetic fiber has fully replicated cotton's combination of durability, versatility, or the way denim evolves with wear. That central role makes the resilience of the cotton system increasingly important. Cotton markets tightened in August 2026, with benchmark prices moving higher across key markets, according to **Cotton Incorporated**'s Monthly Economic Letter. Global cotton stocks are also forecast to decline, pointing to a tighter supply situation ahead. For mills and brands, the outlook puts greater attention on three areas where the cotton system is evolving: economics, genetics, and trust.

The first is economic. U.S. cotton growers face increasing pressure from low returns, while planted acreage has declined as farmers favor more profitable crops such as soybeans. Brazil continues to expand its role in global cotton, supported by large-scale production, double-cropping, and competitive costs. In Mexico, USDA forecasts point to declining production as farmers reduce planted area amid low returns, water constraints, and other structural pressures.

The second is genetic. Pakistan's cotton sector is dealing with declining production, with poor seed quality and weak seed regulation cited alongside water stress and crop switching. In India, pink bollworm resistance is reducing the effectiveness of Bt cotton, highlighting the need for continued investment in seed development and crop resilience.

The third is trust. Regulation is moving toward greater supply-chain transparency. The EU's Forced Labor Regulation will apply from December 14, 2027, while textiles are among the priority categories being considered for the Digital Product Passport. The European Commission identifies Q4 2027 as the planned adoption period for the textile-specific delegated act, although timelines remain subject to change.

These challenges are being met with developments across farming, breeding, verification, and sourcing. **Citizens of Humanity** are investing directly in regenerative cotton farms. **Better Cotton** has strengthened the regenerative focus of its standards and, in 2026, partnered with **Avalo** on AI-assisted breeding of climate-resilient cotton varieties designed to require less water and fertilizer. Pakistan's **Soorty** has also developed organic and regenerative agricultural programmes supporting farmers.
In the U.S., **COTTON USA** and the **U.S. Cotton Trust Protocol** provide another example. Through the Trust Protocol, growers provide field-level data across six sustainability measures, while brands and retailers gain supply-chain traceability. In 2026, the program reported 2.34 million planted acres providing field-level data, nearly one in four U.S. cotton acres, and launched a physical assurance programme with **Oritain** to independently verify the origin of selected cotton samples. Its 2025 results showed Trust Protocol growers had met or exceeded five of six national goals against the 2015 baseline.

Verification systems are evolving elsewhere, too. GOTS released Version 8.0 in March 2026, with updated requirements covering traceability and claims integrity.

Beyond individual initiatives, cotton-producing regions are also looking at the fiber's future at a systemic level. In Africa, the **African Cotton Association** has placed climate adaptation, productivity, quality, and traceability at the center of its agenda. Egypt is modernizing its cotton and textile infrastructure, increasing private-sector participation and supporting cotton-based SMEs as part of efforts to rebuild its international position. In the U.S., the USDA's Great American Cotton Plan links the health of the farm economy with domestic textile manufacturing, trade opportunities, and demand for American-grown cotton.

Together, these efforts point to cotton as a mature agricultural and industrial system with clear capacity to adapt and improve over time.

The next challenge is scale. Many initiatives remain small relative to the global cotton system, while seed-breeding favor, verification technologies, and digital traceability infrastructure continue to develop. The practical requirements of the EU's textile-specific Digital Product Passport are still being defined. Meanwhile, growers and mills continue to carry much of the cost of regenerative practices, breeding research, testing, and verification, while brands increasingly set sustainability targets. Turning individual projects into lasting infrastructure will require investment across the chain.

The industry does not lack ideas, pilots, or expertise. The opportunity now is to connect them, invest in what works, and bring effective solutions to scale. For denim, the task is not to move away from cotton, but to strengthen the systems that allow it to remain a viable, traceable, high-performance fiber for the category.



IS SUSTAINABILITY DEAD?

EZEQUIEL CEVEY

As a fashion category, a marketing message, and a reason to buy, sustainability is losing influence. Perhaps the problem is not only overuse. The word itself has become too broad to carry much meaning, particularly as environmental claims are increasingly expected to be supported by measurable evidence.



Photo Credit: Gabriela Gatto

The State of Fashion 2025 report found that only 18% of fashion executives considered sustainability one of their top three risks to growth, down from 29%. It also identified a persistent gap between consumer intentions and purchasing behavior: 46% of UK shoppers surveyed said they avoid fast fashion, yet more than half had bought from a fast-fashion retailer during the previous 12 months. In the U.S. and UK, 61% ranked price as more important than sustainability when purchasing fashion.

The experience of brands that built sustainability into the center of their proposition makes this tension difficult to ignore. **MUD Jeans**, founded around circular denim, was declared bankrupt by a Dutch court citing historical debt and decreased sales. The brand has since been relaunched under a new company, retaining its circular positioning. U.S.-based **Everlane** built its identity around transparency, responsible sourcing, and sustainability. In May 2026, it agreed to be acquired by **Shein**, while continuing to operate as an independent brand with its environmental commitments, according to CEO Alfred Chang.

Sustainability may be becoming less useful as a consumer-facing label at exactly the moment it is becoming harder to avoid operationally. The EU's Empowering Consumers for the Green Transition Directive applies from September 27, 2026, strengthening rules around environmental claims and labels and providing consumers with clearer information, including on durability and reparability.

Sustainability claims need supporting information, and environmental performance must be demonstrated rather than simply communicated. The transition is already visible in the industry's data. The **EIM** Denim Industry Progress & Insights 2025 Report, based on more than 100,000 real denim finishing processes from 359 manufacturers worldwide, found that 66% of processes were classified as low environmental impact. Average water consumption stood at around 30 liters per garment, while 85% of processes were classified as low impact for energy consumption.

Chemistry remains the most significant challenge. 27% of processes were still classified as high-impact, making chemical use the largest remaining area of concern. Worker health presented a more positive picture, with 68% of processes classified as low impact, linked to the growing use of automation in place of higher-risk manual techniques. These figures do not make denim "fully sustainable." They make specific areas of performance measurable.

The global fashion supply chain would require around $1 trillion in investment for decarbonization. This creates a structural problem: a brand can request cleaner processes, lower emissions, or better data, but the investment frequently sits with suppliers that may have limited assurance of sufficient future business. The same tension exists in denim finishing. Technologies capable of reducing water, energy, chemical, and worker impacts already exist, but adoption remains uneven. EIM's figures suggest that the industry has made measurable progress in some areas while continuing to rely on practices and processes that carry higher impacts in others.

Sustainability's biggest problem is no longer relevance but credibility. The word can describe a fiber, a factory, a process, a product, or an entire brand, yet the environmental differences between those claims can be substantial. That makes evidence more useful than terminology.

The era of sustainability as a separate fashion category is losing ground. Not because environmental problems have disappeared, or brands and consumers no longer need to address them. Regulation, measurement, and supply-chain pressure are making environmental performance harder to separate from ordinary business decisions. Perhaps the most constructive outcome of this fatigue is that sustainability ceases to be something fashion sells and becomes something fashion does.

NEXT DENIM COLORS

DENIM PREMIÈRE VISION

For S/S 28, color becomes a new point of reference for more individual ways of dressing. Designers are using color as a toolbox for differentiation.

The season opens with shadowed summer darks. Burgundy, ebony, tobacco brown, and deep violet remain highly pigmented, yet appear washed, slightly whitened, and luminous. These shades blur the line between seasons, moving easily into lightweight cottons and airy summer garments. On denim, they gain depth through overdyeing, stone washing, acid washing, and abrasion.

At the opposite end, colored essentials redefine the neutral wardrobe. Optical white gives way to recycled whites with grayish undertones, while greige sand, hemp beige, and urban mauve introduce subtle shifts in color. Natural fiber tones, including hemp and linen, are increasingly used as a creative base, while recycled-content fabrics bring inherent irregularities that become part of the design language.

Greens evolve toward washed, faded, and mineral expressions, with blue-based khakis and vaporous shades suspended between green and blue. Blues, meanwhile, gain chromatic intensity: clear mid indigos, green-cast blues, and vibrant ultramarines. New bio-based pigments also offer alternatives for reproducing classic mid-indigo tones.

Browns continue to expand, from clean, washed beiges to warmer cigar shades and deep ebony alternatives to black. Finally, revitalizing brights such as zest yellow and brick pink act as sharp accents, applied through sprays and coatings, for radical garments that create distinction.

Iced bleach

LAB102 for a new benchmark in waterless process

All-over: The iced bleach process based on organIQ seek delivers a modern, uniform all-over bleaching effect characterized by clear contrasts and a premium acid-wash aesthetic.

LAB 102 Blue veins of CHT



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SMARTER FINISHING



Luca Braschi, Marketing & Technology Manager at **Soko Chimica**, spoke with **WeAr Denim** about process simplification, the economics of chemical innovation, and how chemistry and process design can help reduce the impact of denim finishing without compromising aesthetics.

How important is process simplification to the future of denim finishing?

The future of denim finishing will depend not only on creating new effects, but also on finding smarter ways to achieve them. Simplifying the process means reducing unnecessary steps, time, water, and energy, while making production more consistent and efficient. Hydrogel, for example, transforms the washing environment into a gel and combines different functions within a single bath. It can reduce processing time by up to 50% while significantly reducing water consumption. But process simplification is not only about sustainability. In a production environment, time directly affects costs, capacity, and productivity. Making a process faster and easier to manage can make new finishing solutions more attractive and viable for laundries. For Soko, this is a key direction for the future: developing innovations that are not only more responsible but also make sense from a production perspective. It means rethinking the process itself rather than simply adding another product to it.

How do you approach the economic side of chemical innovation?

Innovation has to make sense beyond the chemistry. A lower-impact solution only becomes valuable when it works within the economic reality of a laundry. That means looking at the whole process - not only the cost of the chemical, but also water and energy consumption, processing time, productivity, and whether existing machinery can be used. We focus on solutions that can be integrated into current production rather than requiring laundries to completely rethink their infrastructure. Hydrogel, for example, can have a direct impact on productivity and costs by shortening processing times and simplifying operations. Chemical innovation should find a balance between environmental responsibility and commercial viability. If an innovation cannot work economically on the production floor, it will struggle to achieve meaningful scale.

How do you see chemistry helping to balance the aesthetic and environmental goals of denim finishing?

We have a simple rule: never compromise the aesthetics of a garment, whatever process we apply. You can make the most sustainable denim in the world, but if nobody wants to wear it, what have we really achieved? Our research is driven by one clear goal: to remove the need to choose between aesthetics and environmental impact. This is where innovation becomes meaningful: when a more responsible process does not ask denim to look or feel different, and sustainability becomes part of the solution rather than a compromise.

Looking at where your main clients are located today, what do you think their geography tells us about the denim industry?

Denim is truly global, but the challenges are never exactly the same from one place to another. By working directly with mills, brands, and laundries across different markets, we see that each geography has its own priorities, from creativity and product development to efficiency, production, and environmental impact. What connects them is the growing need to innovate without losing sight of commercial relevance. For Soko, this international network is more than a footprint. It is a continuous exchange of ideas. What we learn from a project in one market can often inspire a solution for another, creating connections across the supply chain that might not happen otherwise. In that sense, the geography of our Projects Division reflects the denim industry itself: diverse, interconnected, and increasingly driven by collaboration rather than borders.

How are brands balancing these priorities when choosing suppliers?

Price remains extremely important, but the lowest price does not necessarily mean the lowest overall cost. Lead times, quality consistency, development speed, minimum quantities, logistics, sustainability performance, and the ability to solve problems quickly all have an impact. For a mill, the challenge is to find the right balance without compromising the product. We try to understand what matters most for each customer and build the right solution around those needs.

What do you see as the biggest changes ahead for denim?

I don't think the future of denim will be defined by one new product or one single piece of technology. What matters more is how different elements can start working together in a smarter way. Chemistry, technology, and process design are becoming increasingly connected, and this is where I see the real opportunity. A new chemical can be important, but its real value comes from what it allows you to do differently. This is also how we approach our work at Soko. We are not just asking: "Can we develop a better product?" We are asking: "Can we find a better way of doing this?" For me, that is the most important part of denim's future: making the industry more efficient and responsible without losing the creativity, imperfections, and character that make denim feel alive.



OPINION



THE ETHICS OF AI

Dr. Dilek Erik, Global Marketing Manager at **Sharabati Denim**, shares her perspective with **WeAr Denim** on the growing use of artificial intelligence in marketing.

Artificial intelligence is becoming an increasingly visible part of our daily lives. We see more and more AI-generated images and videos around us. Some are so professionally made that we may believe they are real, while others are less convincing and can be immediately recognized as AI-generated. There is no doubt that AI is entering our lives at an incredible speed, and we are constantly finding new ways to use it. I am not here to discuss the quality of AI-generated work. That is a subject that changes almost every day. Instead, I would like to raise a different question: How ethical is the use of AI in marketing? We do not need to go too deeply into the technical side. We all know that AI does not simply create something from nothing. It uses information, images, ideas, and content that already exist in the digital world and reshapes them according to our needs. In other words, what we see as a new creation is actually a combination of work that has already been created by others. In creative industries, we have concepts such as copyright and intellectual property. In academic work, we have citations. Both exist for the same fundamental reason: to recognize the work of the original creator. So, what happens when a company spends months working with designers, creative teams, photographers, and videographers, investing significant time and money to develop a campaign or presentation, while another company can use AI to create something based on similar creative work at almost no cost, without acknowledging its original source? Can we really consider these two situations to be equivalent?

AI is becoming an important tool for presentations, communication, and content creation. There is nothing wrong with using technology to make our work more efficient. But discussing the ethics of AI and finding ways to protect creative effort is a responsibility we all share. For companies that speak about integrity, corporate values, and respect for people's work, transparency about how their content is created may soon become another measure of credibility. Companies that use AI without acknowledging its sources, potentially giving customers the impression that something is entirely their own creation, may first face an ethical question and, in the near future, perhaps a legal one.

Before we reach that point, it is in everyone's interest to start the conversation and establish the right boundaries today.

INSIGHT

THE CHANGING SOURCING MAP



Texworld Apparel Sourcing Paris, which closed on September 2, highlighted a global reshaping of sourcing strategies. Buyers are becoming more selective, looking for greater responsiveness, innovation, and diversification from their partners. The major Asian production hubs remain essential, while a growing number of emerging and nearby countries are gaining attention, from Bulgaria and Uzbekistan to Ghana. Longer transit times and disrupted sea routes are making West Africa particularly interesting for some buyers. Andreas Eickelmann of **SVAN International Import-Export** sources denim collections from Bangladesh, Vietnam, and Pakistan. He has been exploring Africa for several years as a way to reduce transportation costs, with Ghana among the potential options.

The free trade agreement being ratified between India and the EU could stimulate demand in Europe. Neelam Shami Rao, Secretary of the Indian Ministry of Textiles, says Indian producers will need to develop more products designed for the European market.

Buyers are also changing what they order: fewer or split orders for raw materials, and more finished products. These allow them to complete collections, add new references quickly, or develop private-label lines without managing the entire design and production process. For the first time, the show achieved an even balance between fabrics and finished products.

Innovation was also on the agenda. At **Avantex**, **IROONY** received the "Coup de Cœur" prize at the 2026 Fashion Pitch for a platform that converts agricultural biomass into cellulose pulp.

Texworld Apparel Sourcing Paris turns 30 in 2027, with editions planned for January 25-27 and September 6-8.

OPINION

BEYOND THE MAP



THIMO SCHWENZFEIER

Thimo Schwenzfeier is a fashion and trade show professional with more than two decades of experience across marketing, communications, retail, and industry events.

In the last few months, I have been to **CIFF** in Copenhagen, **Modefabriek** in Amsterdam, and Hong Kong Fashion Week. Nobody in those three rooms was really talking about the same market. In Copenhagen, the conversation was about storytelling and how to survive a shrinking wholesale market. In Amsterdam, it was about retail and how much of it is still left. In Hong Kong, hardly anyone mentioned Europe at all. There, the conversation was about capacity, tariffs, and where the next order is coming from.

We keep saying the denim map is shifting. I am not sure this is the right word. The map is actually multiplying.

There is a tariff map, which is mostly American. In the first four months of 2026, U.S. apparel imports fell by 12% in value. China lost more than half, while Cambodia, Egypt, and Türkiye gained ground. Sourcing strategies were rewritten because of decisions nobody in our industry could influence.

There is a regulation map, which is European. Since 27 September 2026, the EU's Empowering Consumers for the Green Transition rules apply. From now on, it matters less where you produce and more what you can actually prove about it.

And there is a dependency map, which has barely moved at all. According to OECD data, Vietnam or Cambodia remain deeply integrated into regional supply chains, with significant foreign value embedded in their exports. On paper, everybody diversified. In reality, the dependency is still there, only harder to see.

Three maps, and they contradict each other. Optimize for one and you lose on the other two. This is the structural change, not the fact that some production has simply moved elsewhere.

What worries me more is that we still meet as if there were one map. The market has become more fragmented, and alongside the established events, there is a growing role for more focused and curated formats that can respond to specific needs. I should say that I am involved in building such formats myself, so read this with that in mind. The question is less about choosing between large and small events and more about creating denser settings for the people who need to meet. It is about who is in the room and how often you see them. A brand, a mill, and a supplier may be operating across three different maps, but they still have to agree on one product. That takes time and repeated contact.

The next advantage in denim will not come from finding the cheapest country. It will come from having the relevant relationships that survive the next time the maps are redrawn.

INTERVIEW

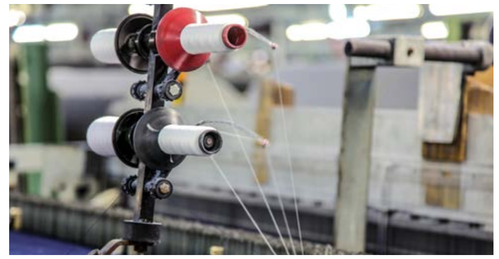
BEYOND THE FABRIC:
THE NEW ROLE OF THE MILL



WeAr Denim spoke with Özge Özsoy, Sales & Marketing Chief at **Bossa**, about changing expectations from brands, Türkiye's position in the global denim landscape, and how mills are adapting to a more complex sourcing environment.

Denim has always been fluid. From a mill's perspective, what are brands looking for today?

Five years ago, brands were already looking for quality, price, and reliable delivery. Today, expectations are much broader. Brands want partners that can respond quickly, develop new ideas with them, and provide greater transparency throughout the supply chain. We are seeing increased interest in traceability, responsible raw materials, circularity, and measurable sustainability. At the same time, brands expect mills to bring creativity and innovation to the table, rather than simply produce fabric to a specification. The relationship is becoming more collaborative.



Türkiye has developed a strong position between large-scale Asian production and the European market. What makes Turkish denim relevant today?

Türkiye combines proximity, flexibility, craftsmanship, and strong product-development capabilities. Being close to Europe allows brands to react quickly to market demand, while the Turkish denim industry has developed a sophisticated production infrastructure over many years. For us, Türkiye's advantage is not about competing with Asia on volume alone. It is about combining quality, speed, flexibility, and innovation. Türkiye is currently the EU's largest external supplier of denim fabric by market share, reflecting the importance of this position.

As technology becomes more accessible, where do you think the real competitive advantage for a denim mill lies today?

Having access to a particular technology is no longer enough to differentiate a mill. The real advantage lies in combining technology with experience, creativity, and people. A strong R&D team, an integrated production structure, and the ability to turn an idea into a commercially viable fabric are all important. At Bossa, our integrated structure covers spinning, weaving, dyeing, finishing, and quality processes, together with our R&D capabilities. This allows us to develop and control a product from the fiber stage through to the final fabric.

Looking ahead, what changes in sourcing and denim manufacturing do you expect to have the greatest impact on the industry over the next few years?

Sourcing will become more strategic and transparent. Brands will increasingly want to work with suppliers who can provide not only fabric, but also data, traceability, responsible materials, and measurable environmental performance. Circularity will also become more important, particularly around recycled and regenerated fibers, textile waste, and resource efficiency. At the same time, supply chains will continue to require greater agility as market demand can change quickly. For mills, investment cannot be limited to machinery. R&D, people, digital systems, sustainability, and long-term partnerships will also be important. Mills that can combine these elements and work as development partners rather than simply suppliers will have an important role in the future of denim.

How are brands balancing these priorities when choosing suppliers?

Price remains extremely important, but the lowest price does not necessarily mean the lowest overall cost. Lead times, quality consistency, development speed, minimum quantities, logistics, sustainability performance, and the ability to solve problems quickly all have an impact. For a mill, the challenge is to find the right balance without compromising the product. We try to understand what matters most for each customer and build the right solution around those needs.





DESIGN UPDATE AT BOSS

HUGO BOSS has made two changes to its design structure in 2026, affecting both Womenswear and the BOSS BY BECKHAM line.
Kerstin Dorst joined HUGO BOSS in January as Senior Vice President Business Unit Womenswear, a newly created role covering womenswear across BOSS and HUGO. She also oversees the creative direction of the womenswear collections, working with Creative Director Marco Falcioni. Dorst previously spent more than ten years at **Tory Burch**.
Daniel Kearns was appointed Head of Design for BOSS BY BECKHAM in August. Based in London, he will oversee collection creation, design, merchandising and branding, working closely with David Beckham. Kearns previously served as Chief Creative Officer at **Kent & Curwen** and **Cerruti 1881**, and as Creative Director of Kent & Curwen during its collaboration with Beckham. His first BOSS BY BECKHAM collection is scheduled for F/W 2027. hugoboss.com



TOMMY PUTS DENIM AT THE CENTER WITH ROMEO BECKHAM

Tommy Jeans is presenting a denim range spanning loose, straight, and slim silhouettes alongside rigid and selvedge constructions. The collection forms part of **Tommy Hilfiger**'s wider Fall 2026 denim focus, fronted by Romeo Beckham in the "Always Denim" campaign. Beckham wears two of the season's key men's styles: the relaxed, '90s-inspired Theo baggy jean and the straight-leg Dover, highlighting the range of fits within the wider denim assortment. The Tommy Jeans offer also incorporates selvedge styles, including a Regular Straight Jean made from 80% regenerative cotton and 20% recycled cotton, and a Selvedge Loose Jean in 100% cotton. For women, the range includes straight and slim-straight selvedge styles alongside different rises and proportions. Together, the assortment reflects Tommy's current emphasis on denim as a core product category across its collections. tommy.com/tommy-jeans



GLENN MARTENS CONCLUDES TENURE AS DIESEL CREATIVE DIRECTOR

Diesel has announced the departure of Glenn Martens as Creative Director following the presentation of the brand's S/S 2027 collection. Martens' final runway show for Diesel took place in Milan this past September. Since joining the brand, he has overseen a repositioning of denim, experimentation, and the reinterpretation of Diesel's product and visual language, while retaining its established emphasis on accessibility and irreverence. Founder Renzo Rosso credited Martens with strengthening the brand's connection with younger consumers and contributing to its renewed presence in the international fashion landscape. Diesel said the next phase of its creative leadership will be announced in due course. Martens' tenure also marked a period of increased focus on denim as a vehicle for design experimentation, with the material consistently integrated into the brand's runway collections and wider creative direction. diesel.com



SEI LASER PRESENTS ROLL TO GARMENT

SEI Laser presented its latest laser technologies at the first **Denim Première Vision** Tokyo, in collaboration with Japanese distributor **Comnet**. The company focused on applications spanning product development, cutting, finishing, and personalization, with its Roll to Garment concept at the center of the presentation. The system integrates fabric cutting and laser processing into an automated workflow, which SEI Laser says can reduce prototyping and sampling times by up to 90%. The company also presented a collection developed with designer Federico Barengo, produced entirely through the Roll to Garment process as a demonstration of its potential for new constructions and shorter development cycles. The event also marked the introduction of SEI Laser Fashion Academy, a physical and digital platform intended for experimentation, training, and collaboration between designers, brands, and technology specialists. A compact laser system was also demonstrated for on-demand customization of denim and accessories. seilaser.com



NO44 PRESENTS "FOR GOOD" CAMPAIGN

Amsterdam-based denim label **No44** has launched "For Good," a campaign centered on longevity and a move away from seasonal newness. The brand focuses on women's denim, combining clean lines and timeless silhouettes with an approach built around durability, material choices, and responsible design. Its new campaign explores the idea of keeping and wearing garments for longer, with pieces designed to evolve through use rather than be replaced as trends change.
"For Good" presents this philosophy through a collection intended to move across seasons and become more personal with wear. No44 describes longevity, circularity, transparency, and ethically sourced materials as part of its wider approach to denim. "Because sometimes the most fashionable thing we can do is create something you don't need to replace," the brand states. The collection is available through No44's online store. no44store.com

IMPRINT

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NATURALLS BRINGS PLANT-BASED INNOVATION TO DENIM

Avalo, **The LYCRA Company**, **Neela**, and **Soko** have joined forces on "Naturalls", a capsule denim collection presented during Climate Week NYC. Designed by Gordon Muir of **Labor Made Inc.**, the workwear-inspired collection includes trousers, jackets, and aprons, with spinning, weaving, and garment manufacturing developed by Neela. The project combines several material and process technologies across the supply chain. Avalo supplied its Low-Footprint Cotton, which the company says uses zero irrigation, 75% less fertilizer, and generates half the emissions of conventionally grown cotton. The LYCRA Company contributed Renewable LYCRA® fiber, made with 70% renewable content. Soko applied its Hydrogel finishing technology, which can reduce water consumption by up to 85%, alongside its RARE range of naturally derived mineral pigments. The collection is positioned as a demonstration of how fiber, fabric, stretch, and finishing technologies can be combined within a single denim development.
avalo.ai | thelycracompany.com | sokochimica.com | neelablue.com



SHARABATI'S S/S 2028 COLLECTION REFLECTS THE COMPANY'S DNA

Sharabati's S/S 2028 dynamic and versatile collection expands its product offer through a broader indigo palette, colored surfaces, new fabric constructions and increased use of recycled fibers. The collection is organized around four key groups: PRISMA, CHROMATICA, MAXSOFT, and RELIVE.
PRISMA develops the denim and flat fabric offer with a wider range of indigo shades. Opalite brings a light baby blue, Electra a richer medium blue with a subtle red cast, Cloud a softer greyed tone, and Graphite a deeper, more saturated indigo. New Ever colors in khaki, beige, and grey join existing blue, black, burgundy, and brown versions.
CHROMATICA explores color through coatings, introducing royal blue, rust, beige, and yellow across different fabric bases. The finishes create layered and two-tone effects on indigo, alongside cleaner expressions on PFD gabardine.
MAXSOFT focuses on softness and comfort, with fabrics designed to retain their shape while developing through washing. For S/S 2028, new blends incorporate **CIRCULOSE**®, a material made in part from recycled textile waste, resulting in slub textures, fluid drape, and a Japanese-inspired aesthetic.
RELIVE expands the use of post-consumer materials with fabrics developed from recycled cotton and other recycled fibers, adding further options for recycled denim applications. sharabati.com



PEPE JEANS INTRODUCES ITALIAN SELVEDGE CAPSULE FOR F/W 26

Pepe Jeans is introducing a F/W 2026 capsule made with Italian selvedge denim, combining the brand's long-standing focus on denim with fabrics developed by **Candiani**. Established in 1973 and part of **AWWG Group**, Pepe Jeans anchors the collection in familiar silhouettes, including the men's Dalston straight fit and the women's Eden high-rise straight. For men, the capsule includes three selvedge fabrics: deep indigo rigid denim, garment-dyed ecru in an organic cotton left-hand twill, and a mid-shade wash. The range also includes an Italian Selvedge Trucker Jacket made from 13 oz., 100% rigid Candiani denim, pre-shrunk and finished in deep indigo. The women's Eden is cut from 100% rigid, deep indigo denim. The capsule is available through Pepe Jeans' online store, retail network, and selected wholesale partners throughout the season. pepejeans.com

YKK™ Little Parts. Big Difference.™
Supplier Engagement Leader CDP 2025

YKK NAMED CDP SUPPLIER ENGAGEMENT LEADER FOR FOURTH YEAR

YKK Corporation has been recognized as a **CDP** Supplier Engagement Leader for the fourth consecutive year, based on its FY2025 Supplier Engagement Assessment. The recognition reflects YKK's efforts to reduce greenhouse gas emissions across its supply chain, including the establishment of governance structures and targets and collaboration with suppliers. The company also received CDP's top "A" rating in its 2025 Climate Change Survey, marking the third consecutive year it has achieved the highest score. YKK says it will continue its climate initiatives and information disclosure in line with its net-zero target, validated by the Science Based Targets initiative. According to Takayuki Aoki, Vice President of Procurement & Logistics, supplier collaboration remains central to expanding emissions reduction efforts, including discussions around production capacity, global supply, and third-party-verified LCA data. ykk.com | cdp.net



CHT INTRODUCES ICED BLEACH FOR RESOURCE-EFFICIENT FINISHING

CHT has introduced ICED BLEACH, a garment-finishing process based on its organIQ seek system and designed to create an all-over bleached effect with strong contrasts and an acid-wash appearance. The process combines organIQ seek with organIQ seek PAL as a pretreatment and BEIZYM PUSH, a natural micro-abrasive additive. According to CHT, the combination allows the bleaching effect to be achieved with reduced water, energy, and material use, while simplifying processing and supporting more uniform results. ICED BLEACH is presented as a waterless finishing approach that can be applied to blue and black denim as well as reactively dyed garments. CHT positions the process as an option for contemporary wash developments where visual effects and resource efficiency need to be considered together.
solutions.cht.com

REPORT

THE RISE OF THE DRAGON

SHAMIN VOGEL

Investment in technology and know-how has moved China from low-cost supplier to the center of the global denim chain. **WeAr Denim** looks at where it happens, who is behind it, and where the next growth will come from.



In the West, "Made in China" still triggers a familiar picture: cheap production, uneven quality, and doubtful labor standards. In denim, that picture is out of date.

China exported approximately €1.75 billion worth of denim fabric in 2025, accounting for 43.2% of global exports, according to ExportPlanning. Pakistan followed with €533 million, India with €374 million, and Türkiye with €298 million. Current geopolitical tensions have slowed trade this year, and Chinese producers are using the time to invest in technology while expanding their domestic and emerging markets.

Most of that activity is concentrated in Guangdong province. Xintang, a town in Guangzhou's Zengcheng district, is known as the denim capital of the world and remains China's largest jeans hub, with thousands of businesses spanning spinning, weaving, garment production, and washing.

Rapid growth once came at a heavy environmental cost, and Xintang has invested significantly to change that. Following a central government environmental inspection in 2016, the town closed heavily polluting plants and moved washing operations into upgraded, shared facilities with centralized wastewater treatment. Local reports describe ozone and enzyme processes that use significantly less water and fewer chemicals. The cleanup came at the cost of a slower decade for the industry. Now, Xintang is growing again, with smart factories, design, and e-commerce at its center.

The fabric mills sit nearby, around Foshan and Shunde. **Advance Denim**, founded in Shunde in 1987, calls itself the oldest denim mill in China. **Vita Textile**, founded in Foshan in 1996, operates across the supply chain, from spinning to garment production, within a single group.

Garment groups add further scale. **Black Peony**, founded in 1940 and based in Changzhou, Jiangsu province, covers the process from spinning to finished garments. **J.D United**, a Chinese jeans maker, merged with Taiwan's **Roo Hsing** in 2017, creating a group that accounts for about seven percent of global jeans supply. Hong Kong-based **Crystal International**, founded in 1970, earned US$262 million in denim revenue in the first half of 2025.

Vivian Wang, CEO of **Kingpins**, dates the transformation to the moment Chinese companies began bringing their own ideas to international customers. "The idea of China as simply 'the manufacturer for the world' is clearly outdated. China is a creator now, too."

Speed is one reason. "China has one of the most complete supply chains in the world, and that means speed. Everything can happen domestically, start to finish, in one place."

Producers confirm the picture from their side.

In Hangzhou, Zhejiang province, a second hub with a strong technology sector, **Dinghui** offers a view from inside one company. Its headquarters are just 50 meters from **Alibaba**, a proximity that reflects the broader influence of technology on the company's operations. Dinghui recently introduced AI-driven fabric inspection and is extending the technology to laser scheduling and production planning.
Many Chinese manufacturers have made substantial investments in advanced machinery, reducing errors, improving consistency, and creating better working conditions.

Old knowledge plays a role, too. Chinese companies are combining Western manufacturing expertise with Chinese traditions. Dinghui revived an indigo method recorded in a Chinese encyclopedia from 1637 and, by adding microbial technology, reduced the fermentation cycle from 28 days to seven, a change the company says saves 67 percent of water.

Sustainability is now a significant priority across Chinese denim. New technology, traditional methods, and the expectations of international customers have all pushed the industry in this direction, and many factories now operate to high environmental standards.

Chinese denim makers are increasingly selling to Chinese consumers, too. Xintang's factories long produced garments for other markets; now the town is also developing its own commercial ecosystem, including shared livestream studios at **E.C.PARK.** In December 2025, Alibaba International and **Douyin** signed partnerships with the local denim association to open new export routes.

Talent is another part of the transformation. A growing number of young Chinese designers are studying at leading fashion schools abroad before returning home to build their own labels, bringing international training into a large and increasingly sophisticated domestic market. Brands are following. At **Kingpins** China-Hangzhou in May, Chinese labels including **Atelier Yee**, **LurkWorldwide**, **Wirote**, and **Veerkracht** appeared alongside the mills.

Kingpins Amsterdam returns October 14 and 15 at SugarFactory with a dedicated Made in China section. The mills **Advance Denim**, **Dynamic Denim**, **Vita Textile Group**, **Seazon**, and **Panther Denim** will present new fabrics. Dinghui will showcase tie-dyed runway garments created with **San Yi Tie Dye**, while **Daosheng Synbiology** will explain how it produces bio-indigo through fermentation. Wang will also premiere Indigo Story: The Hands That Remember, a film about the artisans of San Yi Tie Dye.

"The China of the past isn't the China of today," says Wang.



VIVIAN WANG
CEO, **KINGPINS SHOW**



ROBERT DEAKIN
SALES DIRECTOR
DEYAO TEXTILE

A CAPABILITY RESERVE

"Old workshop-style facilities have been replaced by centralized, intelligently managed operations with shared energy and waste-treatment systems. What China sells today is not capacity but certainty: environmental compliance, delivery reliability, and complex process capability. Brands once saw 'Made in China' primarily as a cost advantage. Today, it functions as a capability reserve. When American clients nearly vanished under tariffs, China's factories pivoted to domestic and emerging markets while, in many cases, becoming brands themselves. The global supply chain still relies on China for high-difficulty processes and scalable innovation. This knowledge cannot simply be relocated, even as Chinese companies expand overseas through a 'Made by China' business model. In 2026, 'Made in China' is no longer a cheap label. It is a solution to complex problems."



VINCENT DJEN
DIRECTOR
CHENG KUNG GARMENTS

MORE THAN PRODUCTION

"Chinese brands bring both competition and opportunity to incumbent brands, and the opportunity is the part many may not see. In denim, China has 3D sampling, eco-dye and eco-wash technologies, and new performance materials, while AI and 3D tools are advancing rapidly. Chinese brands are entering markets around the world, from **MINISO** and **FUGA** to **Semir** and **HLA**, while consumer brands like **Pop Mart**, **Cider**, **VIVAIA**, and **ANKA** are becoming household names. Their success is rooted in a generation of talent in China that learned international business models remarkably quickly. China is no longer simply a place with production expertise. It is also a center of expertise in innovation, product development, marketing, and business strategy. It is time to work with these experts not only on sourcing, but together as one team."

DENIM TOP 100

This list honors the 100 most influential people in the denim industry. Together with an advisory panel, the editorial team of **WeAr** has researched and selected denim movers, shakers, and influencers. It is a combination of outstanding denim brands, washing experts, fabric, and yarn producers, as well as the best retailers, shows, and showrooms. They were chosen based on their achievements and each one of them has made a significant contribution to improving the industry. There are undoubtedly many others we could name, and we applaud all those striving to enhance and improve the business. This list will be continued and changed according to the times. We invite our readers to contribute with suggestions – please email **denim@wear-magazine.com.**

Paige Adams-Geller
Founder | Paige — BRAND

Mohiuddin Ahmed
CEO | Pioneer Denim — INDUSTRY

Omer Ahmed & Murtaza Ahmed
CEO & Managing Director
Artistic Milliners — INDUSTRY

Junior Arraes & Danny Hodgson
Founders | Rivet & Hide — RETAIL

Kiya & Demitra Babzani
Founder | Self Edge — RETAIL

Sanjeev Bahl
Founder and CEO | Saitex — INDUSTRY

Scott Baxter
CEO | Kontoor brands — BRANDS

Lela Becker & Tim Kaeding
Founders | Mother Denim — BRAND

Ian Berry
Denim Artist — ART

Renzo Braglia
CEO | Brama Group — SHOWROOM

Michael Buckley
CEO | True Religion Jeans — BRAND

Rudy Budhdeo
CEO | Son of a Stag — RETAIL

Markus Cadruvi
Founder | DeeCee Style — RETAIL

Alberto Candiani
President | Candiani Denim — INDUSTRY

Joel Carman
Founder | Over The Rainbow — RETAIL

Hyun-Joon Cho
Chairman | Hyosung — INDUSTRY

Ana Paula Alves de Olivera
Founder | Be Disobedient — AGENCY

Jason Denham
Founder | Denham — BRAND

Umberto De Vita
Marketing Director | Advance Denim — INDUSTRY

Maurizio Donadi
Founder | Transnomadica — BRAND

Nicolas Dreyfus
CEO | Frame — BRAND

Denis Druon
CEO | TheFlaxCompany — INDUSTRY

Tremaine Emory
Designer and Founder | Denim Tears — BRAND

Dr. Dilek Erik
Global Marketing Manager
Sharabati Denim — INDUSTRY

Maria Erixon Levin
Co-Founder | Nudie Jeans — BRAND

Marco Falcioni
Creative Director | Hugo Boss — BRAND

Borys Fridman
Owner | Jeans Jeans Jeans — RETAIL

Mr. Haruya Fujita
President | Kurabo — INDUSTRY

Michelle Gass
CEO | Levi's — BRAND

Marithé & François Girbaud
Founders
Marithé + François Girbaud — BRAND

Daniel Grieder
CEO | HUGO BOSS — BRAND

Reinhard Haase
CEO | Unifa Group GmbH — SHOWROOM

Shinichi Haraki
CEO | Iron Heart — BRAND

Roger Hatt
Owner | VMC Original Store — RETAIL

Tommy Hilfiger
Founder | Tommy Hilfiger — BRAND

Juun.J
Founder and Designer | JUUN.J — BRAND

Mamoru Kaihara
Director & Corporate Adviser
Kaihara Denim — INDUSTRY

Norbert Kaltenbach
Owner | Jeans by Kaltenbach — RETAIL

Issei Kinoshita
Store Manager | Hinoya — RETAIL

Florian Klinder
Managing Director
Munich Fabric Start — TRADE SHOW

Hideki Kobori
Chairman & Director | Asahi Kasei — INDUSTRY

Fatih Konukoglu
CEO | Isko Division — INDUSTRY

Yul Ku
CEO | AG Jeans — BRAND

Walden Lam & Kevin Martin
Founders | Unspun — BRAND

Stefan Larsson
CEO | PVH Corp — FASHION GROUP

Chris Leba
CEO | r13 — BRAND

Kenneth L. F. Lo
Chairman of the Board & Executive
Director | Crystal International Group — INDUSTRY

Steve Maggard
President | CONE DENIM — INDUSTRY

Nicolai Marciano
Creative Director | GUESS Jeans — BRAND

Paul & Maurice Marciano
Co-Founder | GUESS — BRAND

Glenn Martens
Creative Director | Maison Margiela — BRAND

Cindy McNaull
Business Development Director
INVISTA (Cordura) — INDUSTRY

Hiroyuki Murai
CEO | Moussy — BRAND

Dr. Frank Naumann
CEO | CHT Group — INDUSTRY

Dennis H. Nelson
CEO | The Buckle — RETAIL

Tsuyoshi Noguchi
Director | Minedenim — BRAND

Andrew Olah
Founder | Kingpins — TRADE SHOW

Carlos Ortega
Chairman | AWWG — FASHION GROUP

Hiroaki Otani
Chairman & Representative Director
YKK Corporation — INDUSTRY

Salvatore Parasuco
CEO | Parasuco — BRAND

Giovanni Petrin
General Manager
Martelli Lavorazioni — INDUSTRY

Lylian Richardière
Founder & Creative Director
Le Temps Des Cerise — BRAND

Luca Roda
CEO | Jacob Cohën — BRAND

Andrew Rosen
Co-Owner | Alice + Olivia,
Rag & Bone, FRAME,
Veronica Beard — BRANDS

Renzo Rosso
Founder | Diesel — BRAND

Jeffrey Rudes
Co-Founder | J Brand
& CEO | L'Agence — BRANDS

Zhang Rui
Founder | SAUCE ZHAN — BRAND

Ksenia Schnaider
Co-Creative Director
KSENIASCHNAIDER — BRAND

Olaf Schmidt
Vice President Textiles & Textile
Technologies | Messe Frankfurt — TRADE SHOW

Boris Schwartzman
CEO | Nuevo Mundo — INDUSTRY

Martin Semsch
Founder | Vizoo — INDUSTRY

Rajiv Sharma
CEO | Archroma — INDUSTRY

Stephan Sielaff
CEO | Lenzing — INDUSTRY

Enrique Silla
Founder | Jeanologia — INDUSTRY

Matteo Sinigaglia
CEO | Fashion Box Spa — BRAND

Gary Smith
CEO | Lycra — INDUSTRY

Danielle Statham
Founder | Fibretrace — INDUSTRY

Ricardo Steinbruch
Owner | Vicunha — INDUSTRY

Nichole Strydom
Premium Buying Director | Zalando — RETAIL

Veronica Swanson Beard &
Veronica Miele Beard
Founders | Veronica Beard — BRAND

Tracey Tan
Co-Owner | Queen's Couture
The Denim Store — RETAIL

Adam Taubenfligel
Co-Founder, Creative Director
Triarchy — BRAND

Alice Tonello
Marketing Director | Tonello — INDUSTRY

Jean Touitou
Founder | A.P.C. — BRAND

Uçurum family
Owner | Bossa — INDUSTRY

Matteo Urbini
CEO | Soko Chimica — INDUSTRY

Uwe van Afferden
Owner | Heritage Post Store — RETAIL

Menno van Meurs
CEO | Tenue de Nîmes — RETAIL

Jos van Tilburg
Founder | G-Star — BRAND

Andrea Venier
Managing Director
Officina +39 — INDUSTRY

Marcus Wainwright
Founder | Rag & Bone — BRAND

Amy Wang
General Manager
Advance Denim — INDUSTRY

Vivian Wang
CEO | Kingpins — TRADE SHOW

Marco Weichert
CEO and founder | Performance Days — TRADE SHOW

Mark Werts
Founder, CEO | American Rag Cie — RETAIL

Amy Williams
CEO | Citizens of Humanity — FASHION GROUP

Pharrell Williams
Men's Creative Director
Louis Vuitton — BRAND

Gordon Wu
Owner | Vigoss — BRAND

Cathryn Yi Xu
Owner and CEO | Dinghui — INDUSTRY

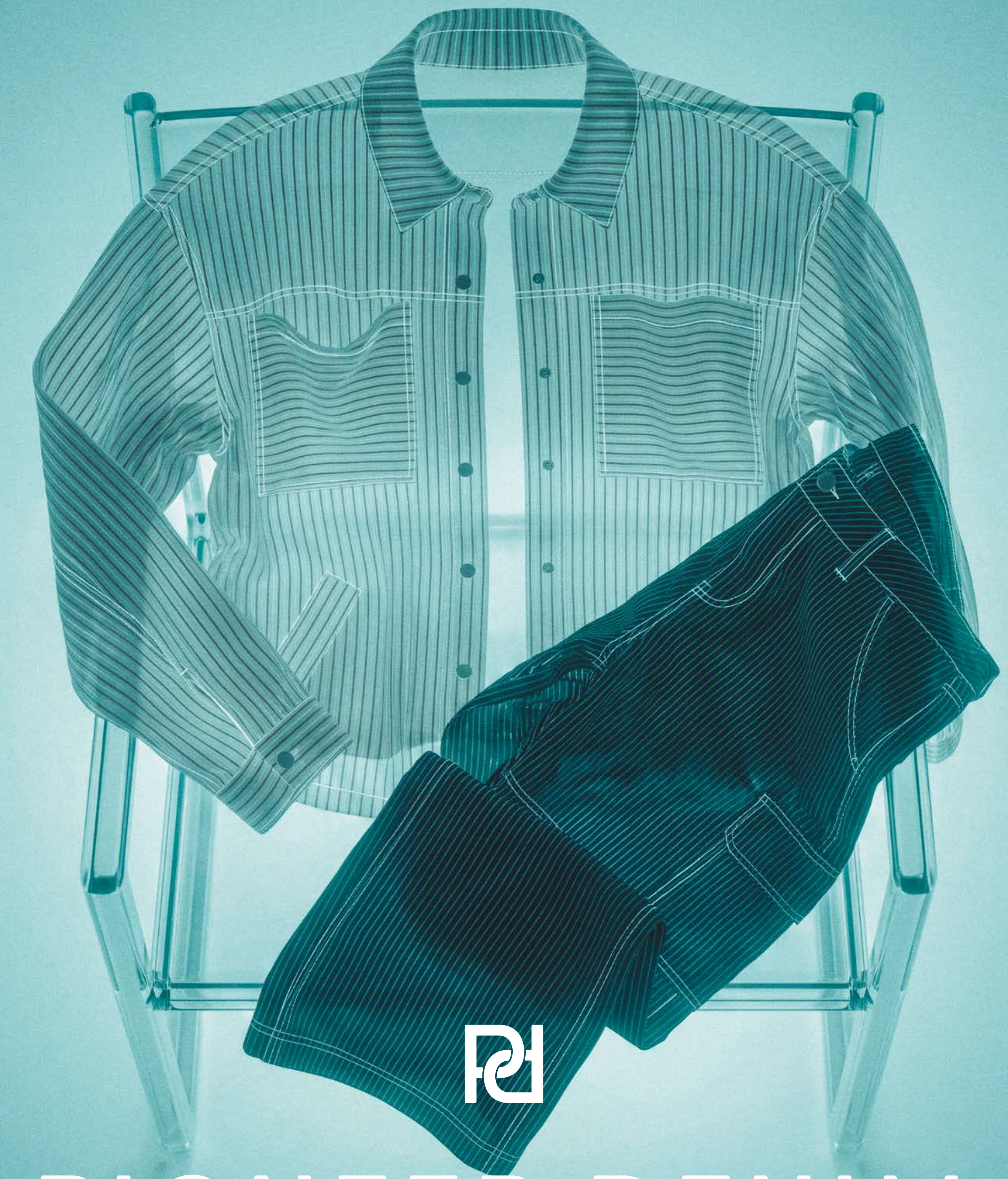
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