STYLE IN MOTION

The Evolution of Resale and Retail

INSIGHTS REPORT SUMMER 2025

SCADask

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"Because of social media and just how people get information now, they're making really independent choices. It's not even regional anymore — it's all lifestyle-based"

— ALESSANDRO CANNATÀ
CHAIR, LUXURY AND BRAND MANAGEMENT

EXECUTIVE SUMMARY

Fashion is entering a new phase shaped by circulation, speed, influence, and infrastructure. From the rise of secondhand shopping to the prevalence of "dupe" culture, and from algorithm-driven trend detection to responsive production, the industry is evolving at every level. This report outlines how secondhand culture, digitally guided design, fan-led loyalty, and adaptive manufacturing shape the future of fashion.

INDUSTRY SHIFTS	OPPORTUNITIES	FUTURE OUTLOOK
Secondhand Reclaimed	Brands can embed resale into core strategy through curated archives, smart tags, and in-store storytelling experiences.	**THE VINTAGE VANGUARD:** Resale will evolve into a branded ritual where provenance, scarcity, and access merge.
Trust Redefined	Transparency, resale culture, and community-led storytelling offer new ways to build trust and long-term consumer connection.	**TRUST SIGNALS:** Loyalty will grow from proof and participation, shaped by transparency, digital culture, and values-based engagement.
Trend Cycle Accelerated	AI tools and social platforms offer early signals for emerging styles, enabling brands to design and launch instantaneously.	**THE NEW DESIGN LOOP:** Trend forecasting will evolve into an interactive process guided by digital behaviors.
Responsive Design Systems	On-demand production, modular design, and traceable materials allow brands to reduce waste and build circular models.	**FUTURE-FIRST FASHION:** Manufacturing systems will adapt in real time, aligning production with immediate consumer needs.

INTRODUCTION:

FROM INFLUENCE TO INFRASTRUCTURE

Forget runways and glossy magazines: Gen Z and Gen Alpha consumers actively define fashion today. These digital natives drive the industry with expressive, values-based purchases that redefine identity through clothes. Unlike past fashion cycles shaped by centralized influence and shared rebellion, today's trends move fast, fueled by niche communities and personal narratives.

Secondhand style now carries new weight. Once a budget option, resale has transformed into a cultural and economic force. For younger shoppers, vintage garments represent sustainability, self-expression, and stories worth telling. A piece with history often holds more value than something freshly made, especially when it mirrors personal aesthetic and ethical beliefs.

While trends remain part of the system, their mechanics have changed. Fashion historian Carmela Spinelli said, "Fashion moves like a pendulum. When styles go as far as they can in one direction, they swing back." Silhouettes and waistlines cycle through extremes — yet the pace and drivers of change now matter more than the direction. Today's trend cycle responds to digital currents rather than seasonal collections.

Platforms like TikTok and Instagram drive these shifts at hyperspeed. Micro-trends rise overnight, "dupe" culture challenges traditional value markers, and creators remix looks in real time.

This fast-moving, participatory system invites new voices into fashion's conversation. The result: more diverse styles, more localized influences, and more meaningful connections between clothes and culture.

Beneath this surface lies another transformation: production. Consumers expect speed, relevance, and transparency not only in what they buy but in how it's made. Real-time manufacturing, predictive sizing, and circular design models now form fashion's new foundation. These innovations shift production from forecasted guesses to demand-driven accuracy.

Together, these forces — expressive consumption, algorithmic trend analysis and boosting, and adaptive production — reshape fashion's identity. The industry no longer revolves around seasonal drops or top-down design. Instead, fashion acts as a living system, responsive to cultural energy and personal meaning. It evolves constantly, shaped by creators and consumers who expect their clothes to be transparent, tailored, and built for change.

SCADask reached out to Gen Z for their viewpoints on fashion. Their insights are highlighted throughout this report.

KEY TAKEAWAYS

1 Secondhand fashion shapes mainstream retail, merging scarcity, storytelling, and cultural value into everyday commerce.

2 Consumers define value through quality, ethics, and transparency, reshaping expectations around brand prestige and price.

3 AI tools and digital platforms offer early insights into cultural shifts, helping brands move with speed and precision.

4 Brands begin with demand and build circularity into every step, using smart systems to reduce waste and increase relevance.

5 Shoppers seek visibility into sourcing and labor, making transparency a baseline for brand credibility.

6 Independent creators launch collections with digital tools that bypass traditional barriers and foster cultural connection.

7 Resale influences how garments are designed, priced, and circulated, embedding reuse into product development.

8 Fashion now operates as a responsive ecosystem, where creation, fulfillment, and community evolve in direct relation to cultural need.

01
THE VINTAGE VANGUARD
How the past tells new stories

Now a foundational model for the future of retail, secondhand fashion's next phase transcends its past as a countercultural statement or budget-driven choice. As younger generations redefine the values underlying consumption, resale increases in prominence. Secondhand items represent ethical, expressive, and culturally resonant choices that allow Gen Z and Gen Alpha to showcase storytelling.

This shift is already transforming retail infrastructure. Branded resale programs, peer-to-peer platforms, and archive mining foster a circular economy grounded in transparency, scarcity, and narrative. Reclaiming their histories, brands like The Gap and Chloé are actively transforming their past collections into future value.

The transition from resale to a standard model will be driven by technology. Smart labels will connect garments to authenticated digital IDs, and AI tools will enhance resale discovery through image recognition, mood-based filters, and natural language queries. In-store resale will become ritualized — as curated spaces showcase provenance rather than price. These secondhand stores and collections will become cultural touchpoints for consumers.

The ramifications of this transformation run deeper. The concept of fashion ownership will be redefined as resale checkout becomes standardized and integrated into e-commerce ecosystems,. Consumers will anticipate seamless transitions between buying, trading, and reselling — facilitated by platforms that are intelligent, data-driven, and emotionally engaging.

> "Think about stories that get passed on through generations. That's what happens when you put on a garment: It's emotion — storytelling."
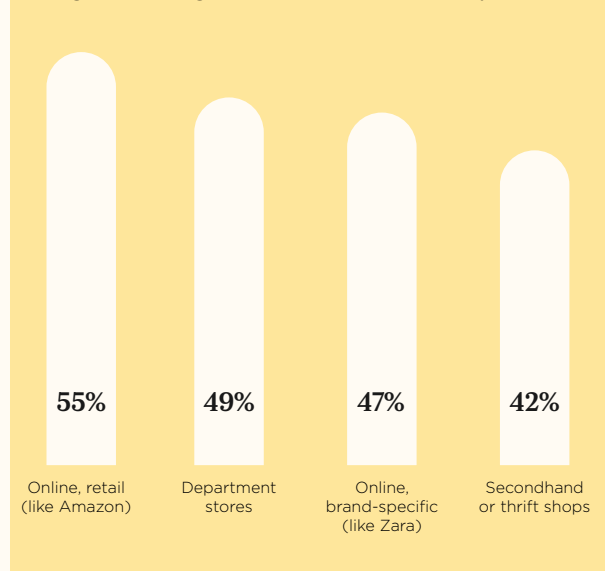
— CARMELA SPINELLI
FASHION HISTORIAN, EDUCATOR,
BRAND STORYTELLER

The directional shift to secondhand fashion influences the creation of new collections and their accessibility to shoppers. As checkout processes and brand strategies integrate resale options, fashion's past merges with its future. In a system focused on relevance and responsibility, archival pieces are preserved and serve as drivers of tomorrow's trends.

While digital channels have surged, physical retail remains robust. Nearly half of consumers still prefer department stores and boutiques, signaling fashion's pendulum-like return to direct human experiences. In an increasingly digital world, in-person shopping offers tactile connection, immediate feedback, and personal interaction, reinforcing fashion as an intrinsically human, interactive pursuit.

The top four retail channels demonstrate how omnichannel shopping is the norm, including a high ranking for secondhand shops.

55%	49%	47%	42%
Online, retail (like Amazon)	Department stores	Online, brand-specific (like Zara)	Secondhand or thrift shops

Hollis Maxson's (B.F.A., fashion, 2025) "Heritage and Hands" collection incorporates the quilting traditions and folk heritage of Berea, Kentucky.

GapVintage — The Power of Curated Heritage

Fashion brands increasingly reclaim control over their archives, reshaping the resale market by curating vintage collections with the same precision and intent as new releases. Abandoning third-party platforms, companies now build resale ecosystems that reflect their brand identity, elevate secondhand goods, and engage new generations of consumers.

Gap's 2024 launch of GapVintage marked a major turning point. Instead of outsourcing, Gap took full ownership of its past to feature original garments from the 1980s, 1990s, and early 2000s, including logo-heavy sweatshirts, striped tees, and classic denim. Each seasonal release revived these items with fresh purpose and cultural relevance.

Global vintage curator Sean Wotherspoon styled each collection with a collector's eye and cultural sensibility. To avoid overwhelming the market with surplus, Gap released limited runs available online and in flagship stores, framing vintage as intentional and collectible.

This strategy unlocked new value from Gap's legacy. Each piece included verified details on era, fit, and fabric, transforming nostalgia into authenticated heritage. Customers reconnected with the brand's past through a direct, trustworthy experience that elevated resale into a premium offering. GapVintage also reshaped how the brand re-entered cultural conversations. Through editorial drops, curated storytelling, and direct-to-consumer access, Gap used archival fashion to strengthen relevance and advance sustainability goals.

For Gen Z and Millennial shoppers, GapVintage bridged past and present — offering transparency, scarcity, and cultural alignment. The program matched their appetite for limited-edition releases and brand authenticity, while reinforcing circular consumption as a lifestyle. This signals a broader shift. Resale may soon operate as a standard retail channel, with archival garments presented alongside new collections. Artificial intelligence could streamline pricing and inventory matching. Brand-owned resale ecosystems promise less waste, deeper loyalty, and multigenerational brand equity.

With GapVintage, Gap built more than a resale line. It designed a blueprint for circular commerce, proving that secondhand can deliver strategy, storytelling, and staying power.

"As the vintage and secondhand market continues to grow and resonate among younger generations, I'm looking forward to bringing GapVintage to the hands of today's youth around the world."

— SEAN WOTHERSPOON
GLOBAL VINTAGE CURATOR AT GAP AND
CO-FOUNDER OF ROUND TWO

Chloé x Vestiaire Collective — Building Instant Resale into Luxury

Luxury brands once approached resale with hesitation, unsure how to maintain control over pricing, presentation, and perception. In 2023, Chloé reshaped that dynamic. Through its "Chloé Vertical" program, the brand partnered with Vestiaire Collective to embed resale directly within the garment, designing a new system centered on transparency, traceability, and trust.

Each item included a digital ID, accessible through a QR code or NFC chip integrated into the garment. Scanning the ID revealed detailed information about the item's origin, production, and care instructions.

Customers gained full visibility into how and where the garment was made, along with a verified digital certificate of ownership.

The resale process came fully integrated. Owners could scan the item and initiate a listing on Vestiaire Collective in seconds. The platform auto-generated descriptions, pricing suggestions, and listing details, eliminating the need for extra verification. The embedded ID enabled instant authentication and seamless resale.

> "I'm delighted to be enabling Chloé customers around the world the opportunity to make informed decisions about the transparency, traceability and circularity of our products,"

— RICCARDO BELLINI
CHLOÉ PRESIDENT AND CEO

Chloé maintained visibility throughout the item's lifecycle. Each resale updated the digital record, creating a living archive of ownership and transaction history. This data gave Chloé valuable insights into product longevity, resale velocity, and customer behavior beyond the initial purchase.

Customers also experienced benefits. Instant resale removed friction, validated authenticity, and extended the relationship between wearer and brand. A Chloé garment now included resale access, a traceable history, and built-in value retention on top of style.

The initiative advanced Chloé's sustainability goals as well. Traceable data supported claims around circularity, while authenticated resale reduced waste.

Vestiaire Collective, in turn, expanded its platform as the go-to destination for verified Chloé pieces, reinforcing its role in the evolving secondhand economy.

Chloé's approach reimagined luxury resale as a built-in feature, not a post-sale afterthought. By designing for ownership, re-ownership, and brand-led traceability, Chloé elevated the secondhand experience and positioned digital IDs as the future of fashion transparency.

Emerging Trends

Secondhand retail is entering a transformative phase marked by deep integration and cultural significance. Resale redefines brand loyalty as customers engage with products throughout their lifecycle, allowing brands to build lasting relationships based on trust. Ownership becomes an experience enhanced by digital identifiers and resale access. Technology plays a crucial role, as scannable tags provide data on origin, care, repairs, and ownership history, turning each item into a living record. Designers focusing on long-term engagement can foster deeper connections. Additionally, circular practices evolve from optional to core strategies, impacting logistics and product development. This shift enhances relevance and resilience in fashion. Ultimately, resale reframes how value is assigned, with secondhand goods gaining added cultural and emotional significance as they evolve across different owners and moments.

Action Guide

Embed Resale Within the Brand: Position secondhand as part of core offerings. Curate archive drops and branded vintage capsules that match the quality and storytelling of new collections.

Elevate the In-Store Experience: Reimagine physical retail as cultural space. Integrate resale with personalization, styling, workshops, and repair services to build lasting community engagement.

Simplify Discovery with AI: Use visual search, smart filtering, and instantaneous product matching to make secondhand shopping fast, intuitive, and tailored to individual taste.

Prove Circular Value: Share verifiable data on item condition, origin, and environmental savings to reinforce trust, transparency and accountability.
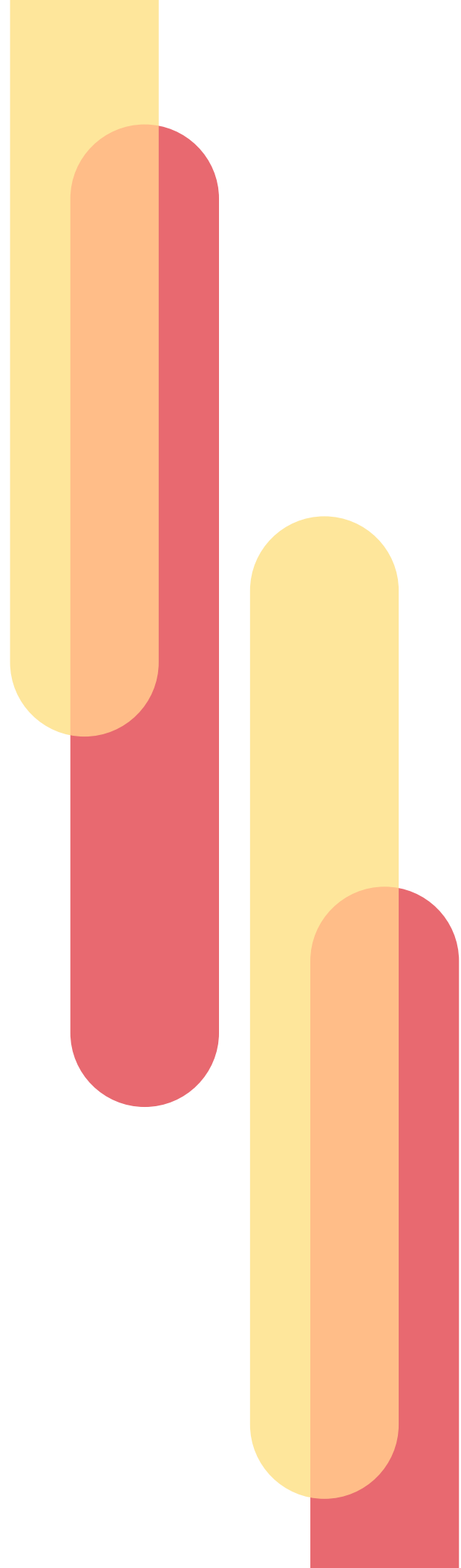
SCAD alumna Lauren Carden Sadasivan (B.F.A., fashion, 2010) showcases her
love of vintage design at her store, The Future on Forsyth, in Savannah, Georgia.

02
TRUST SIGNALS
What drives fashion loyalty today

Fashion loyalty looks different now. For decades, heritage, prestige, and consistency shaped consumer trust. Labels earned allegiance over time, and shoppers returned season after season. That dynamic has shifted. Today, loyalty forms — and fades — faster than ever, shaped by digital culture, social media trends, and peer influence. Platforms like TikTok, Instagram, YouTube, and Reddit drive trend discovery, reinterpretation, and amplification. Young consumers steer momentum, deciding what resonates. What once took years to build can now surge within weeks through shared content and digital moments.

At the core of this accelerated ecosystem: dupe culture. A dupe, short for "duplicate," offers a lower-cost version of a high-end product, capturing style without high prices. Brands like Quince and Italic don't lean on legacy or exclusivity. Instead, they emphasize transparency — how items are made, where they come from, and what they cost. Many use the same materials or manufacturers as luxury brands, yet offer more accessible pricing. Younger shoppers seek quality, ethical sourcing, and fairness. Logos carry less weight than clarity and trust.

Simultaneously, digital fandom introduces a different form of loyalty. Labubu, a character created by artist Kasing Lung, has risen as a fashion icon through limited drops, community-driven storytelling, and viral appeal. Collaborations with companies like Uniqlo and Vans have sparked global engagement. This loyalty emerges from shared rituals, cultural play, and scarcity-driven hype. Followers connect through memes, moments, and emotional storytelling. With a thriving internet and social media culture, this attachment often develops instantly.

As loyalty evolves, fashion brands must rethink how they foster trust, build community, and encourage return engagement. Whether driven by values or viral culture, the loyalty equation has changed. What once required years of brand building can now materialize with a single scroll.

Social networks drive cultural shifts.
The top three sources for fashion inspiration include:

72%
social media influencers

52%
celebrities

52%
friends and family

"The area that we're really researching and this is super early, ... is how to get the design, how to streamline opportunities in the design process. We're not looking for AI to replace the design process, but how do we iterate more quickly?"

— SCADstyle 2025 GUEST RACHEL BASSLER
DIRECTOR OF CAD AND PRODUCT INNOVATION AT TIFFANY & CO.

Quince and Italic – Transparent Dupes and the New Luxury Standard

Luxury once relied on mystique, with the key pillars of craftsmanship, exclusivity, and price. Today, brands like Quince and Italic rewrite that formula. They reveal where goods are made, compare materials with designer labels, and show that many luxury and affordable products share the same manufacturing origins. Secrecy no longer sells; proof does.

Quince positions itself as a direct-to-consumer disruptor. Its site details every step of sourcing, from Italian leather to Mongolian cashmere, often used in items priced five times higher elsewhere. Cost breakdowns, supplier certifications, and origin details appear alongside each product.

"We [Italic] want to offer the same quality and same kind of level design as these great brands, but at a much more value-driven price point."

— JEREMY CAI
FOUNDER AND CEO OF ITALIC

A $100 handbag sits next to its $2,800 designer equivalent — visually provoking consumers to reconsider how luxury pricing works.

Italic takes a subtler path. While it doesn't market itself as a dupe brand, it highlights sourcing as its strength. Italic partners with factories that also produce for heritage labels but omits brand names from its messaging. Instead, it emphasizes quality through rigorous sampling and selective factory vetting. The outcome: designer-level products, minus the markup.

Consumer behavior reflects this shift. According to Morning Consult and Mintel, nearly half of Gen Z and Millennial shoppers now embrace high-quality lookalikes. In the UK, willingness to consider luxury-style alternatives climbed from 12% in 2016 to 47% in 2024. These shoppers prioritize quality and transparency over brand prestige.

Social platforms reinforce the trend. Creators on TikTok and Reddit dissect materials, compare fit, and post side-by-side images without apology. Their tone feels empowered — less about deals, more about decoding a system built on inflated value.

Legacy brands now face pressure to justify every dollar. In a market shaped by transparency and digital literacy, heritage alone won't sustain loyalty. Brands must offer substance behind the story — and proof behind the price.

"The magic here [Quince] is we're not producing on-demand, but we're producing near just in time, which allows us to get scale and match supply and demand really tightly."

— SID GUPTA
FOUNDER AND CEO OF QUINCE

Labubu – From Toy Shelf to Trendsetter

Labubu, created by Hong Kong–Belgian artist Kasing Lung, began as a niche collectible in 2015. By 2025, this mischievous, elf-like figure had evolved into a global fashion accessory. Unlike brands that build buzz through luxury comparisons, Labubu gained traction through storytelling, scarcity, and strategic collaborations — offering an alternate path to digital-era desirability.

Initial momentum came through Pop Mart's blind-box series, captivating collectors across Asia. In 2024, global interest surged after BLACKPINK's Lisa appeared with a Labubu keychain, sparking a social media frenzy. Almost overnight, Labubu shifted from a curious collectible to a must-have fashion staple, gracing the bags and wardrobes of celebrities like Rihanna and Dua Lipa.

Strategic partnerships amplified its reach. Collaborations with Coca-Cola, Vans, and an upcoming global collection with Uniqlo UT firmly placed Labubu in mainstream fashion. Launching in August 2025, the Labubu x Uniqlo UT collection offers playful graphic tees and sweatshirts at accessible prices, expanding appeal beyond toy collectors.

Social media platforms fueled Labubu's rise. TikTok, Instagram, and Weibo overflowed with user-generated content — from unboxings to outfit inspiration — driving organic virality. By April 2025, #Labubu hashtag had surpassed 1.2 million posts on TikTok, signaling its broad, cross-generational reach.

This fan-powered growth contrasts sharply with traditional luxury marketing, signaling a shift toward more accessible, joyful forms of cultural capital.

Labubu's ascent reflects a deeper behavioral change. It fuses fashion and collectible culture to offer status through storytelling, community, and shared digital rituals. Carefully timed drops maintain exclusivity, while pricing and tone invite wide participation. This balance attracts consumers seeking meaningful engagement, not just logos.

Looking forward, Labubu demonstrates how authenticity, resonance, and community shape modern brand success. As consumers prioritize connection over convention, brands that embrace cultural storytelling and fan-powered engagement will define the next chapter in fashion. Labubu exemplifies how today's fashion icons emerge from shared meaning and digital momentum.

"What's happening in fashion feels like a natural evolution. Today, people want to wear their personalities, to show the world who they are through what they carry, collect, and wear. Labubu speaks to that desire for something playful, expressive, and a little bit rebellious."

— **KASING LUNG**
ARTISTE AND LABUBU CREATOR

Emerging Trends

The future of fashion will move beyond scheduled drops and legacy prestige, centering instead on shared screens, creator collaborations, and algorithms that surface trends before they scale. Dupe culture will evolve into an open-source design economy, where communities remix aesthetics as cultural authorship. AI-powered forecasting will allow brands to approve collections ahead of trend peaks, aligning product launches with emerging demand. Digital-native shoppers will expect transparency in sourcing and accountability in design as standard practice. Brands that succeed will treat influence as an ongoing system rather than a fleeting moment, developing design tools, content, and product pipelines that adapt to the rapidly evolving preferences of their audience.

Action Guide

Design for Remixability: Create products that can evolve across microtrends, user styling, and resale cycles. Focus on modular pieces, multipurpose silhouettes, and culturally fluent motifs.

Treat Dupes as Insight: Use consumer interest in dupes as a window into unmet expectations around value, ethics, and accessibility. Study what's being replicated and why.

Embed Trend Forecasting at Platform Speed: Adopt AI-powered tools that parse real-time social data to detect aesthetic shifts early and guide rapid design pivots across categories.

Build with Resale in Mind: Engineer products for circularity from launch. Incorporate QR-linked digital IDs, authentication-friendly detailing, and clear provenance to ensure items retain long-term cultural and resale value.

"It's Me, Eloise" collection by Laurel Wolcott (B.F.A., fashion, 2023)

03
THE NEW DESIGN LOOP
Culture, code, and creation

Generative AI has changed who gets to create. What once required technical skill or formal training is now possible with a short description and the right tool. Platforms like Cala help emerging designers move from idea to production faster than ever. Tools like ZERO10 let users create digital fashion simply by describing it. Design has become more accessible, flexible, and fast.

This shift is already visible across the industry. Established brands use AI to develop prints, experiment with color, or preview full lookbooks. Independent creators use it to bypass traditional gatekeepers and launch collections directly to consumers. For students and new voices, it lowers the barrier to entry. Anyone with an idea can now prototype and share it.

AI also changes what the design process looks like. It automates technical tasks and supports creative ones. A designer can now focus more on concept, styling, and narrative while AI handles variations, fitting, or production specs. This balance frees up time and invites more experimentation. Instead of replacing human creativity, AI helps it stretch further.

The influence of real-time tools that monitor cultural movements further amplifies this behavior. AI-powered platforms like Heuritech analyze billions of images across social media to uncover early indicators of visual trends, detecting silhouettes, fabrics, colors, and styling patterns well before they achieve mainstream traction. This data informs product launches, allowing brands to produce smaller, quicker collections aligned with online trends. This means smaller drops, faster reactions, and fewer wasted resources.

The result is a system built on participation. Design becomes a two-way process. Consumers shape what they see. Creators respond quickly. Algorithms track and refine every step. As these tools continue to grow, they will not just support fashion. They will help define its next phase. AI helps fashion move at the speed of culture.

AI-enhanced illustrations from Bailey Musnicki's (B.F.A., fashion, 2024) senior collection "AI vs. The Artist."
Prompts: ChatGPT – Questions about AI and female artists; NightCafe Creator – Key words like: neon, glitch, and Renaissance painting.
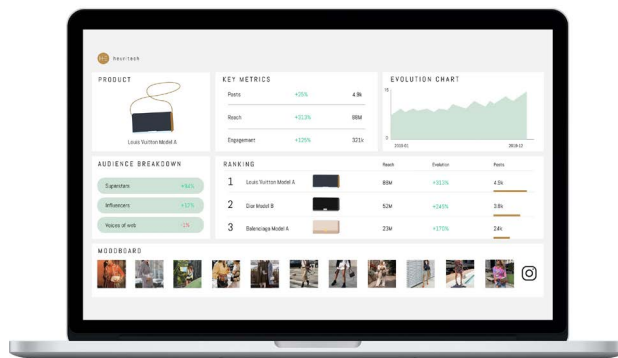
"I use it [AI] daily for any kind of admin, any kind of tasks like that, that frees me up to spend more time on more creative, more custom work, and more human-centric endeavors."

— SCADstyle 2025 GUEST RED GODFREY
VP CREATIVE AT NORDSTROM

# 56%
adopt new fashion trends immediately within weeks

Heuritech — The Algorithmic Turn in Trend Forecasting

Fashion strategy today starts with data. Heuritech, a Paris-based fashion analytics company founded in 2013, transforms social media signals into trend intelligence. Built by data scientists and fashion insiders, the platform analyzes millions of images and videos across TikTok, Instagram, and other platforms to reveal which styles gain traction, where they resonate, and how quickly they grow. These insights help brands shape collections that reflect cultural momentum and market demand.

Heuritech's strength lies in its timing. The platform forecasts when interest in a silhouette, color, or style will build, crest, and evolve — giving product teams clear direction across the entire design-to-delivery cycle. With this foresight, brands can adjust production volumes, launch strategies, and marketing calendars to align with real-time consumer behavior. A spike in utility-core across Southeast Asia, for example, guides decisions around product categories, messaging, and drop schedules.
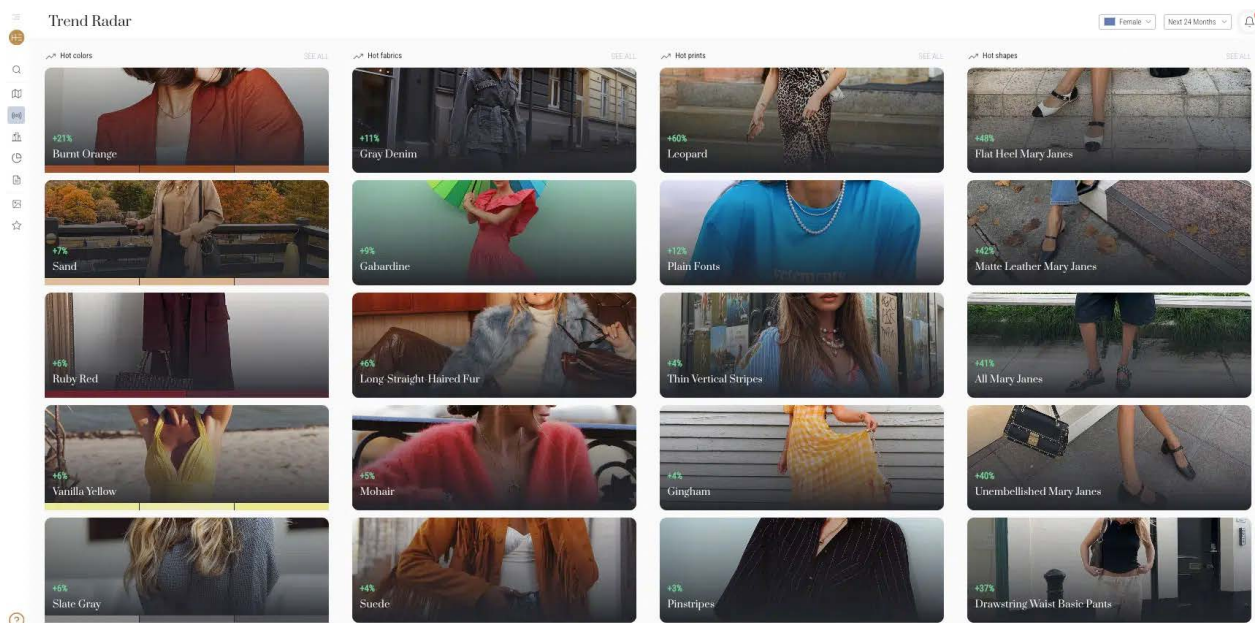
Visual Recognition

This approach connects creative vision with actionable data. Labels like Dior, Louis Vuitton, and Moncler use Heuritech to create with greater precision — crafting collections that respond to culture while minimizing excess inventory. Smaller drops, faster feedback loops, and shorter timelines allow brands to engage consumers in ways that feel timely and relevant.

The broader implications extend beyond operational efficiencies. Heuritech indicates a future where trend forecasting shifts from subjective opinions to data-driven analysis. With trend forecasting rooted in visual culture, brands operate with sharper focus and stronger alignment between design and demand.

Heuritech points to a future shaped by intelligent systems that support faster decisions and more intentional design. As consumer cycles speed up and cultural signals shift daily, fashion gains a powerful advantage: the ability to act early, respond confidently, and stay ahead of the curve.

"AI can also weigh into hyper-personalization by helping stores to sell more through a better understanding of their customer. And greater knowledge of the public's expectations allows them to reduce stock by adjusting production to what is really in demand."

— TONY PINVILLE
FOUNDER AND CEO OF HEURITECH

Mercer — Fashion's Workflow, Reinvented

Mercer, formerly known as CALA, redefines how fashion is designed, developed, and delivered. Initially built to support independent designers, the platform now operates as a full-stack creative engine that merges generative design, collaboration tools, production logistics, and brand support into one seamless system.

Users start with a sketch, inspiration image, or short prompt. Powered by models like Stable Diffusion and Flux, Mercer transforms these inputs into production-ready assets like moodboards, tech packs, and digital prototypes. For early-stage ideas, the platform generates multiple creative directions, refining silhouettes, colorways, and product categories in a fraction of the time traditional workflows require.

Beyond design, Mercer manages execution. It links users to a vetted network of global manufacturers, calculates dynamic pricing based on materials and quantities, and tracks timelines and delivery. The platform also supports branding, e-commerce setup, and product photography — functioning as a quiet partner behind every collection, whether for a solo creator or a growing team.

Brands like Vuarnet and Lazoschmidl have used the platform to develop seasonal prints and streamline their design-to-launch cycle. New designers benefit from simplified production pathways. Established labels gain integrated tools that replace fragmented processes with a unified system..

Mercer reflects a broader industry shift. As the demand for speed, agility, and risk reduction grows, creators need tools that support fast iteration, transparent costing, and responsive production. The platform meets that demand without sacrificing quality or creative control.

AI powers every layer of this system — from concept development to delivery tracking. Mercer weaves AI throughout the process, offering scalable infrastructure to anyone with a vision and a screen.

"Mercer is the leading platform for independent designers, small fashion houses, and established fashion brands to unify development, production, and logistics into a single platform."

— MERCER WEBSITE

Emerging Trends

The line between design and production continues to dissolve. Consumers demand visibility across every stage — from concept to delivery, prompting brands to treat transparency as a core feature. Emerging tools like AI, body scanning, and robotic manufacturing accelerate this shift, enabling faster production, better responsiveness, and greater sustainability. Soon, garments will include embedded data that support care, reuse, and recycling. This evolution pushes circularity from the margins to the center of design strategy. As expectations grow, credibility hinges on aesthetics and fit as well as how clearly a brand communicates its methods. Now, the design journey from factory to retailer visibly shapes a brand's story.

Action Guide

Enable Real-Time Production: Implement micro-factories, body-scanning technology, and modular designs, ensuring products are demand-responsive and inventory-light.

Make Labels Digital Interfaces: Introduce digital passports on garments to provide full transparency, including detailed sourcing, lifecycle data, and circularity information.

Design for Circularity from Inception: Prioritize mono-material garments, detachable components, and recycling-friendly trims, clearly communicating end-of-life pathways.

Narrate Production Story: Use transparency as a narrative asset — explicitly highlight ethical sourcing, production processes, and sustainability initiatives to build lasting trust and consumer engagement.

Rakee Chen's "The Era Collection." Photographer: Xavier Thompson (M.F.A. photography; B.F.A., photography, 2022); model: Kamran McIntosh-Ross (B.F.A. user experience design)

"I think for Gen Z and Gen Alpha, fashion is not only about personal style, it's also about identity in both physical and virtual spaces. Digital storytelling allows fashion to be experienced across multiple platforms, blending narrative, interaction, and community."

— RAKEE CHEN
(M.F.A., FASHION, 2024)

04
FUTURE-FIRST FASHION
Designed for adaptability

Fashion continues to restructure itself. Behind every piece of clothing, a transformation is underway — one that redefines how garments are produced, distributed, and reused. The emphasis is moving from trend cycles to systems that promote adaptability, precision, and lasting value.

Production starts with actual demand and ends in tightly managed inventory. Supply chains now flow through processes that reduce waste and emissions. Brands ask new questions: How can sizing achieve accuracy without physical samples? How can manufacturing scale without creating surplus? How can designers build reuse into the blueprint?

Unspun provides a solution with its Vega platform, which utilizes body scans to create jeans directly from yarn. This process eliminates cutting, waste fabric, and standard sizing. Meanwhile, lululemon's collaboration with ZymoChem leverages microbial fermentation to convert plant sugars into nylon precursors, advancing performance materials with lower environmental impact.

"Advancements like on-demand manufacturing and circular design processes are not only reshaping production but also pushing designers to think more holistically about the lifecycle of a product."

— KORI SMITH URSO
CHAIR, FASHION

Design now extends beyond cut and fabric. It includes sourcing, emissions, packaging, and a garment's potential after first use. Small details — trims, threads, and labels — shape whether a piece can be repaired, resold, or recycled. Innovations like micro factories, predictive sizing, digital IDs, and low-impact materials now form the infrastructure of forward-thinking fashion.

To understand the purchasing ecosystem, consumers increasingly seek transparency. They want to trace where garments originate, understand what materials they contain, and maintain their function over time. When embedded in the product, this information supports a broader system built for continuous evolution.

Adaptability now holds equal weight with creativity. Brands that invest in responsive production, circular design, and real-time tools begin to rebuild fashion's foundation. Every piece must reflect current needs while remaining open to future use.
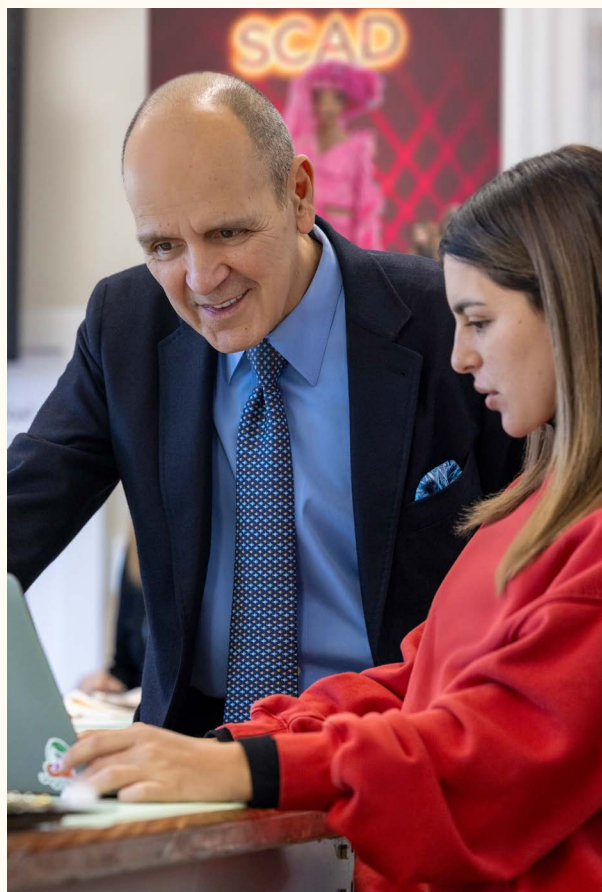
57%
believe in sustainability's importance

"We're living in a world where sustainability is more important.
The younger generations ask themselves if they'd rather spend their money on something they use only one year or something that will last a long time."

— BOB CHAVEZ
FORMER EXECUTIVE CHAIRMAN, HERMÈS AMERICAS AND BOARD MEMBER, MACY'S INC., SCAD EXECUTIVE IN RESIDENCE

Unspun — Rewriting the Rules of Production

Most fashion brands make clothes based on projections. Unspun produces clothing around read demand. Using its proprietary machine, Vega, the San Francisco-based startup has rebuilt the production model from the ground up. Vega doesn't cut fabric. It weaves jeans directly from yarn, one pair at a time, made to fit a single person. No offcuts, no stockrooms, no standard sizing.

The process begins with a body scan. Customers use a smartphone or visit a scanner to capture precise measurements. That data generates a digital pattern, which Vega interprets to weave a seamless garment. Each pair forms as a single tube, shaped to fit, and requires minimal assembly. The result is a product that bypasses traditional cutting and sewing entirely.

Unspun eliminates the need for inventory altogether. There are no size runs, no leftover stock, and no markdown cycles. Instead, it enables localized, on-demand fulfillment. Manufacturing functions as a service — agile, data-informed, and adaptable across different retail environments.

Instead of selling directly to consumers at scale, Unspun focuses on partnerships. In 2023, Walmart piloted Vega to create custom-fit menswear. Decathlon followed with a performance-focused trial. Unspun's long-term goal: place Vega machines inside brand studios and microfactories worldwide, minimizing shipping, reducing waste, and aligning production with local demand.

The company is also collaborating with circular innovators. Projects with Resortecs and Eon explore dissolvable stitching and embedded digital IDs — design choices that support easier resale and recycling. These innovations extend unspun's impact from zero-waste manufacturing to lifecycle design.

By replacing speculation with precision, unspun presents a new supply chain model that favors responsiveness over surplus, and lifecycle thinking over disposability. It redefines what responsible fashion can be by controlling the process at its origin.

In an industry built around excess, unspun offers a different equation: make less, make it better, and only produce what data confirms someone will wear.

"We started unspun when we realized we could not find a fashion company to lead us into the regenerative, sustainable, responsible, intentional future we want, and quite frankly need. The fashion industry thrives on newness. Convincing us to buy more, when what we need is less."

— BETH ESPONNETTE
CO-FOUNDER AND CEO OF UNSPUN

Lululemon x ZymoChem — Engineering Low-Carbon Performance

Nylon is a cornerstone of performance wear, but it comes at a steep environmental cost. Most nylon derives from petroleum, generating significant CO_2 and nitrous oxide emissions. Lululemon's partnership with biotech company ZymoChem introduces a new pathway — one that replaces fossil inputs with plant-based alternatives while sharply reducing emissions.

At the core lies microbial fermentation. ZymoChem's proprietary Carbon Conserving™ platform uses engineered microbes to convert plant sugars into adipic acid, a key ingredient in nylon 6,6. This process emits nearly no CO_2 and delivers up to 50% higher yield than conventional methods, unlocking commercial viability at scale.

"What truly sets ZymoChem apart is their groundbreaking technology, which is capable of producing a bio-based material to create sustainable nylon 6,6 that provides the same look, feel, and quality expected from our high-performance products,"

— YOGENDRA DANDAPURE
VICE PRESIDENT, RAW MATERIALS INNOVATION
AT LULULEMON

For Lululemon, the opportunity extends beyond material substitution. Nylon accounts for nearly one-third of its fabric use. Replacing even part of that volume with a bio-based equivalent shifts the brand's emissions profile and supports its 2030 goal: sourcing 100% recycled or renewable nylon.

This model focuses on upstream innovation. Rather than relying on offsets or recycled blends, it re-engineers the material at its origin. From leggings to outerwear, the fiber performs the same while its source reflects a radically cleaner chemistry.

The collaboration also signals broader potential. If scaled, bio-nylon could reach price parity with fossil nylon by decade's end, eliminating the "green premium" and enabling adoption across sectors like automotive and packaging. Its clean production process may even support future compostable textiles, reducing microplastic risk.

Lululemon and ZymoChem present a new blueprint for performance materials — one grounded in biology, not compromise.

This partnership integrates sustainability at the source, embedding climate impact into the fabric of the product itself. The result: a high-performance fiber built for next-generation apparel — low-carbon, scalable, and capable of transforming the textile industry.

> "We spent years refining our patented Carbon Conserving process with a vision to develop a sustainable version of nylon."

— HARSHAL CHOKHAWALA
CO-FOUNDER & CEO OF ZYMOCHEM
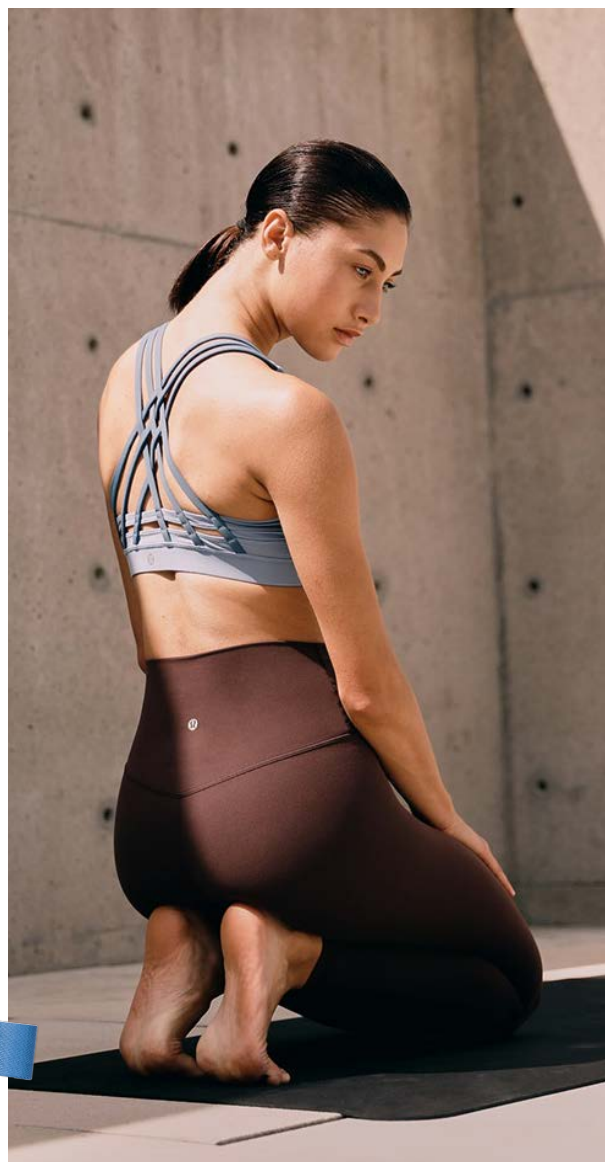
"We're seeing strong consumer appetite for extending the life of garments in practical ways like upcycling, resale, and repair. The return back to natural fibers will play a bigger role too — not just for comfort, wearability, and durability, but because these fibers can return safely to the earth through composting or even regenerative practices like biochar."

— ELEANOR TURNER
FOUNDER & CEO OF THE BIG FAVORITE (B.F.A., FASHION, 2008)

Emerging Trends

Production now drives fashion's value story. With the introduction of digital IDs, modular construction, and embedded data, garments can now share their unique stories, including details about material origins and end-of-life options. Real-time manufacturing software and low-emission inputs help brands match output to actual demand while trimming waste. Circular-first patterns — mono-material knits, dissolvable seams, snap-free trims — guide pieces back into recycling streams. Bio-engineered nylons and sugar-based polyesters lift performance yet slash carbon. Shoppers increasingly ask where fibers grew, how many kilos of CO_2 they saved, and what happens after wear. These questions push factories into the spotlight, converting supply chains into adaptive networks that steward every garment through multiple productive lives.

Action Guide

Adopt On-Demand Models: Use scanning, micro-factories, and local fulfillment to eliminate overproduction and meet demand precisely.

Switch to Bio-Based Inputs: Replace high-impact materials with biotech solutions that match performance while lowering emissions.

Design for the Afterlife: Create garments with clear end-of-use pathways, including mono-materials, dissolvable threads, and recycling-compatible trims.

Make Manufacturing Visible: Elevate backend systems into front-end storytelling that reveals how innovation powers both sustainability and product quality.

Caitlyn Ellerbeck's (B.F.A., fashion, 2022) "RECLAMATION" utilizes denim from 100% recycled garment industry waste that is biodegradable, chemical and dye free, and minimizes water and energy consumption.

CONCLUSION

Most fashion brands earn consumers' loyalty through transparency, cultural fluency, and authentic connection. Today's consumers are not loyal to logos. They return to brands when values align, quality proves consistent, and narratives resonate.

The system itself is changing. Dupes challenge price-based prestige and reframe what makes something valuable. Resale becomes a ritual, not a compromise, offering ethical appeal and emotional depth. Digital fandom fosters loyalty through participation, creativity, and shared storytelling. These shifts reflect real behaviors, not hypothetical ideals.

Context now builds trust. A digital ID that reveals how a piece was made, a transparent cost breakdown, or a culturally aware design holds more power than a logo. A meme, a limited drop, or a community-led campaign can spark deeper engagement than traditional ads, but only when backed by purpose.

Fashion's future will reward brands that act with clarity, speed, and intention. To remain relevant, brands must view loyalty as a dynamic relationship. As resale grows, content circulates, and transparency deepens, loyalty becomes less about image and more about proof. In this new landscape, brands earn their place not by heritage alone but by showing up — open, creative, and consistent.

APPENDICES

RESEARCH METHODOLOGY

Data Collection Methods

2000+
Raw Data Points

Workshops
SCADstyle, SCAD FASHION, McKinsey Series x SCAD

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SCADask Survey Responses

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Expert Interviews

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