



Fenile

FASHION TRIMS INDUSTRY REPORT

BY EU-DESIGN

An in-depth analysis of the evolving trends, challenges, and innovations shaping the fashion trim landscape in 2025



INTRODUCTION

METHODOLOGY

Over the past several months, our research analysts combed through proprietary data, conducted interviews with industry leaders, and analyzed anonymous survey responses, all in an effort to prepare an overview of the fashion trim industry heading into 2025. We estimate the total value of all global trim production, including metal hardware for handbags and shoes, to be just shy of USD \$7 billion. Trim production is a dynamic, ubiquitous industry, spanning 50+ countries, and hundreds of suppliers and vendors.

As we all know, trim specialists are the true geniuses at the heart of the fashion space. Without their dedicated and disciplined effort, the entire industry would certainly fall apart. We want to thank our clients, both locally and internationally, who supported us in these research efforts. At EU-Design Fenili Group, we feel that our unique position can bring increased transparency to the market. We hope these insights translate into more confident decision making within your organization.

INSIGHTS AND ANALYSES

WHAT WE EXPECT TO SEE IN 2025

OUR ANALYSTS SEE FOUR MAJOR AREAS OF FOCUS IN THE NEXT YEAR FOR LEADERS IN THE FASHION TRIM SPACE: FLUCTUATING MATERIAL COSTS, SPEED OF EXECUTION, MAINTAINING CREATIVE DESIGN TRENDS, AND MONITORING SUSTAINABLE PRODUCTION.

Maintaining a healthy profit margin while balancing fluctuating material costs remains a critical challenge for industry leaders. As raw material prices continue to shift due to global economic conditions, and container freight shipments face delays and volatility, companies must adopt agile sourcing strategies while maintaining the quality and aesthetic appeal of their trims.

Speed of execution is a non-negotiable in today's fast-paced fashion cycle, often clashing with the need for meticulous quality control and sustainable practices.

As brands increasingly demand shorter lead times to stay competitive, trim manufacturers must invest in streamlined supply chains. For brands, this emphasis on speed cannot come at the expense of quality or originality, which remain the hallmark of successful trims and garments. Bridging this gap will require a forward-thinking approach, leveraging technology like 3D prototyping and AI-driven design, while fostering close collaboration between designers and production teams. On the supply side, labor shortages in areas like mechanical engineering and dyeing increase the need for innovation and automation.

In tandem with these other major areas of focus, environmental awareness remains centered for large segments of apparel companies, and consumers. Ultimately, bringing these four areas into harmony, despite their (at times) incompatibility, remains the center challenge for leaders in our sub-sector.

01. FINANCIALS

Despite their pursuit of creativity and innovation, fashion and apparel brands still have an underlying profit motivation. This is evident in that almost 60% of our survey respondents stated that all of their decision making for trims fundamentally boils down to economics. Maintaining profit margins can be difficult after adding up manufacturing, tax, and shipping costs, across the supply chain.

Broader economic headwinds at the beginning of 2024 started difficult conversations at leading apparel companies. According to the Bureau of Labor Statistics, apparel prices in the U.S. today are 8.6% higher than in September 2021. During times of financial turbulence, especially in our competitive landscape, we would expect a reduction in new trim developments, and a pivot towards more cost-effective synthetic materials, like polyester.

However, the initial pessimistic economic outlook for 2024 turned out inaccurate. Many North American apparel companies have seen strong financial performance over the preceding twelve months. In 2024 the S&P 500 Apparel Retail sub-industry index rose 26.5%

Now entering 2025, trim teams seem emboldened to experiment. Differentiation in a competitive market can mean seeking out elevated materials, even at a higher price point. Almost one-third of our survey respondents reported real horn as their most appealing material for 2025 development, and one-fifth said real shell was number one.

At the same time, novelty remains highly sought after. Metal hardware for garments was the top trim category that designers and directors wish they had more options for (almost 60%). And almost 40% of trim directors consistently cannot find the exact trim they are looking for. We estimate there are nearly 500 suppliers in the global trim space, so it's not surprising that trim intellectual property, such as a metal mould or a unique production technique, is narrowly distributed. Trying to find a specific shape, color, or quality, can be like finding a needle in a haystack.

02. SPEED OF EXECUTION

Overwhelmingly, across all of our data points, speed of execution was the number one pain point for leaders in the trim space. Almost 70% of respondents to our survey listed lead times as their number one challenge. Speed of execution was easily ranked as the highest priority for a supplier relationship, more important than customer service, transparency, and pricing.

There are multiple stages of trim development and production: ideation, sourcing, sampling, pricing analysis, color approval, wear tests, and bulk production. Delays at the beginning can be caused by a lack of availability, or the aforementioned inability to find the exact correct trim. Delays in the later stages can be due to late design changes, overwhelmed production sites, shipping distances, transit times, and customs hold-ups.

The geographic footprint of a supply chain plays an important role in the speed of production. Traditionally China has been the most popular garment manufacturing location. According to the Wall St. Journal, in 2015 China supplied the U.S. with more apparel imports on a dollar basis than Vietnam, Bangladesh, India, Indonesia, Cambodia, and Mexico combined. Over the past several years there has been a concentrated effort by apparel brands to move production out of China. This year, the U.S. will import more apparel from Vietnam + Bangladesh, than from China. We already expected this shift to continue, and now new tariff policy from the incoming U.S. administration may serve as an additional catalyst for the trend.

From our position, we find the most sophisticated brands are those that partner with trim suppliers close to their garment production. At the same time, it can be challenging to move long-running programs and intellectual property, which have high switching costs. In our research we also encountered a reluctance to split the same trim program across multiple suppliers, due to a risk of inconsistent production. Still, location adaptability allows for greater flexibility and, in turn, time savings.

03. TREND FORECASTING

For obvious reasons, staying on-trend is critical to most apparel companies. Traditionally, trends have originated in runway shows in Europe and made their way across the Atlantic to North America.

While that is still the primary driver of fashion trends (84% report their designers track European fashion houses), two-thirds report they also search vintage stores. Interestingly, two-thirds also rely on their suppliers to show new innovations for design inspiration.

Design and production challenges are different depending on the size and strategy of the brand. Large retailers have to thread the needle, matching high-quality design with a reasonable price - usually accomplished through imitation materials. Luxury brands have more room to experiment, but can be limited by time constraints.

An interesting trend to monitor will be the rise of generative AI in design ideation and development. A recent McKinsey survey reported 73% of fashion executives want to better utilize tools like Chat GPT, Midjourney, and DALL E 3. As many know, these programs can be extremely powerful at reducing menial, repetitive tasks. It remains to be seen how effective they can be on the creative side.

04. SUSTAINABILITY

Sustainability remains the trendiest buzzword in the world of fashion. Despite all of the discussion on the subject, there is a range of concrete work being accomplished. 40% of our survey respondents rarely or never prioritize sustainability in new trim developments. Still there is a strong desire to be better informed on key concepts.

Raw material composition was the most popular topic trim directors want to learn more about. And 60% want to be better educated on standards and certifications.

There are a number of factors encouraging brands to become more sustainable including government regulation in places like California and Europe, and internal advocating within companies. From our perspective, we see the main driver as the end consumer. As it exists today, there is a market both for brands that place sustainability as their highest priority, and brands that don't give it as much attention.

The fashion trim sub-sector is entering 2025 with a mix of challenges and opportunities. Economic pressures remain a constant, but strong financial performance from leading apparel brands has reinvigorated investment in high-quality, differentiated trims. Trim directors and designers are embracing opportunities to elevate their offerings with unique materials and creative innovations, even as supply chain inconsistencies and pricing disparities persist. At the same time, the ongoing demand for speed of execution underscores the importance of efficient supplier partnerships and proximity to garment production hubs.

Sustainability continues to be both a buzzword and a genuine point of evolution within the industry. While not universally prioritized, there is clear momentum toward greater education and implementation of sustainable practices, driven by regulatory pressures and consumer demand. The adoption of new technologies, including generative AI, further highlights the industry's willingness to explore transformative tools, though their long-term impact on creativity and production remains uncertain.

AS BRANDS NAVIGATE THESE DYNAMICS, THE MOST SUCCESSFUL WILL BE THOSE THAT STRIKE A BALANCE BETWEEN CREATIVITY, EFFICIENCY, AND ENVIRONMENTAL RESPONSIBILITY, ENSURING THEY REMAIN COMPETITIVE IN AN EVER-CHANGING MARKET.





SUSTAINABILITY

AT EU DESIGN FENILI GROUP, SUSTAINABILITY IS ROOTED IN EVERY ASPECT OF THE BUSINESS.

Although we maintain a strict set of internal standards, we are also certified by industry leading organizations. Furthermore, we continue to close in on B Corp certification, which will place our firm in rare air amidst the leading sustainability-focused companies in the world.

According to the McKinsey article, *The Future of Sustainable Fashion*, the editors are “convinced that, in the future, brand love and brand loyalty will very much depend on sustainability attributes.”

Consumers increasingly want to know where their garments are made, whether workers were paid fairly, and if the products are built to last. In response to this demand, brands like Patagonia, Athleta, Outerknown, and Faherty are leading with innovative sustainability solutions, such as organic materials, recycled packaging, and renewable energy-powered factories.

Alongside strict internal standards, we are certified by industry leading organizations and are progressing toward B Corporation certification, joining the ranks of top sustainability-focused companies globally.





B CORPORATION

A B Corporation (or B Corp) is a certification awarded to for-profit companies that meet rigorous standards of social and environmental performance, accountability, and transparency. This certification is issued by B Lab, a nonprofit organization. B Corps aim to balance profit with purpose, striving to create positive impacts for employees, communities, and the environment.

SOCIAL AND ENVIRONMENTAL IMPACT

B Corps focus on benefiting all stakeholders, not just shareholders. This includes employees, customers, suppliers, communities, and the environment.

RIGOROUS CERTIFICATION PROCESS

Companies must complete the B Impact Assessment, which evaluates their impact on governance, workers, community, environment, and customers.

LEGAL ACCOUNTABILITY

B Corps can be required to amend their legal structure to prioritize stakeholder interests.

TRANSPARENCY

Certified companies must publicly share their B Impact Report, which details their scores in various impact areas.

CERTIFICATIONS

RECYCLED CLAIM STANDARD

The Recycled Claim Standard (RCS) is an international, voluntary standard that sets requirements for third-parties. It is a chain of custody standard that tracks recycled raw materials through the supply chain. Providing assurance that materials in the final product are recycled and processed more sustainably. RCS requires at least 5% of recycled input with no processing requirements.



GLOBAL RECYCLED STANDARD

The Global Recycled Standard is a more rigorous version of RCS. GRS covers processing, manufacturing, packaging, labeling, trading, and distribution of all products made with a minimum of 20% recycled material. It also has additional processing requirements (social, environmental, and chemical) that must be met.



OEKO-TEX

Oeko-Tex certifies non-hazardous end-products and components. Products that carry the Standard 100 label have been tested and proven free of harmful levels of toxic substances to human health. Every OT certified component is tested against a list of 1,000+ harmful substances.



HIGG INDEX

The HIGG Index is a set of tools that assess and measure the social and environmental performance of the value chain, and the impact of its products. HIGG Fem is a methodology designed specifically for factories and production sites. It serves as a sustainability assessment tool that standardizes how facilities measure and evaluate their performance across categories like working hours, wages, health and benefits, safety, and more.





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