

UnAvailable®

INDUSTRY UPDATE

Q4/2024



[OVERVIEW]

GLOBAL

2024 has been a transformative year for the global apparel industry, with manufacturers navigating a rapidly changing landscape defined by speed, sustainability, and technological potential. While challenges were significant, the year also presented unprecedented opportunities to reshape operations and position Vietnam as a key global player.

The Race Against Time

The demand for faster time-to-market has only intensified, with fast fashion brands setting the pace. The industry average of 17.6 weeks to bring a collection to market remains under pressure as brands push for quicker deliveries without sacrificing quality. Manufacturers have responded by evaluating ways to streamline processes and improve efficiencies, but much of the transformation is still in progress.

On average, it takes

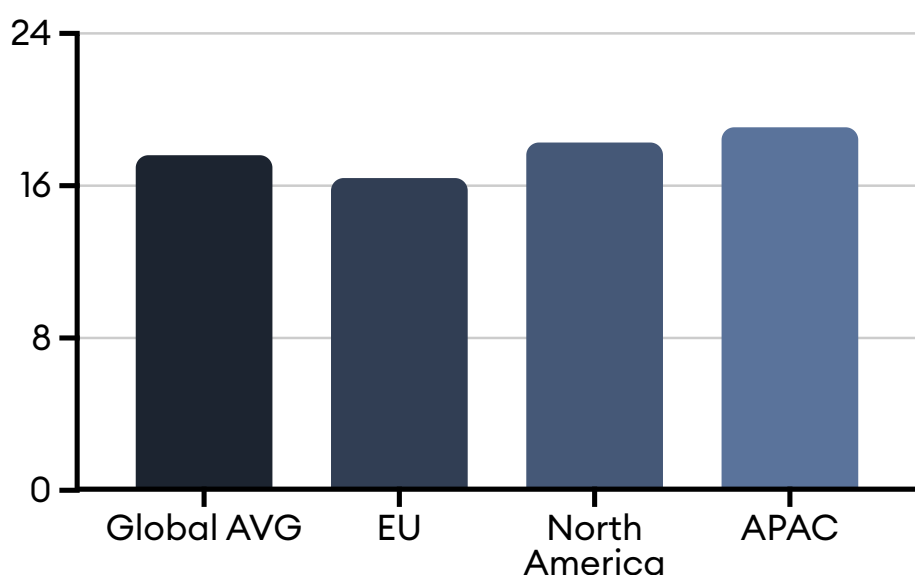
17.6

weeks

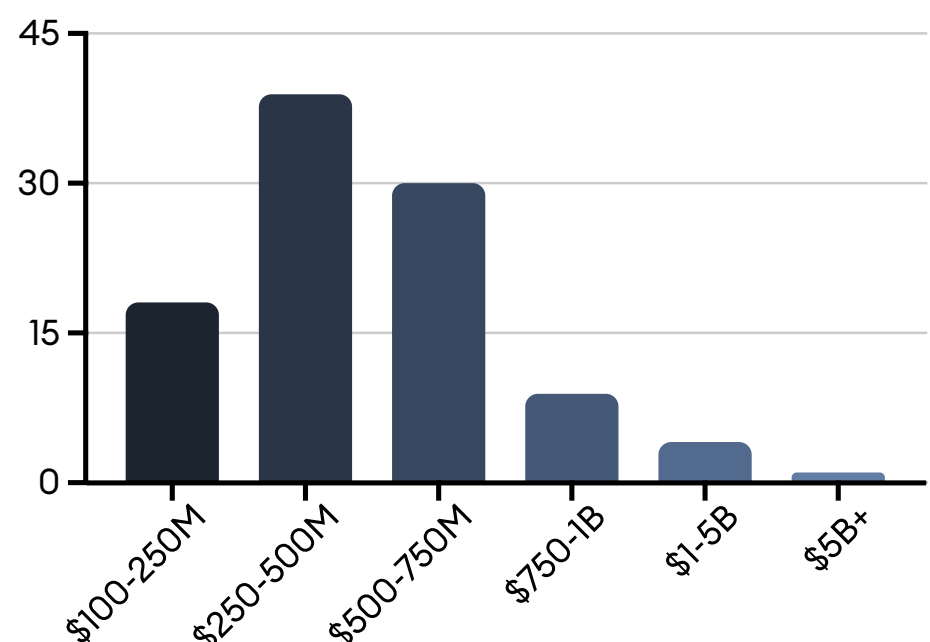
to bring a collection to market

Some of the statistics shared below are derived from a survey conducted by Browzwear. It focuses on larger brands, with an average of \$620m in annual sales. The participants cover a broad range of global brands across major price points and categories. For the full report, please [click here](#)

Average number of weeks to bring a collection to market (by region)



Company size by Revenue





Technology Takes Center Stage

Technology has emerged as the key focus in 2024, with Vietnam hosting pivotal discussions about its integration into the manufacturing sector. While the adoption of tools like AI, IoT, and automation is still nascent, they dominate the conversation as the future drivers of efficiency and innovation. Manufacturers and brands alike are prioritizing the exploration of digital tools to enhance collaboration, reduce errors, and prepare for a tech-enabled supply chain. These discussions underscore Vietnam's ambition to lead in technological transformation across the apparel industry.

The Sustainability Mandate

Global regulations have put sustainability at the forefront. While manufacturers are actively exploring eco-friendly solutions, such as waste reduction and resource optimization, these efforts are in their early stages. Partnerships are increasingly shaped by the need for transparency and accountability, with sustainability becoming a shared goal between brands and manufacturers.

Economic Instability and Vietnam's Stability

Global economic instability, fueled by conflicts in Ukraine and the Middle East, has disrupted supply chains and driven up costs. However, Vietnam has emerged as a reliable and stable manufacturing hub amidst these challenges. Its strategic location, trade agreements, and strong workforce have made it a preferred partner for brands seeking consistency and adaptability in uncertain times.

Looking Ahead

As the world anticipates potential shifts in U.S. trade policies with Donald Trump's expected return to the White House, Vietnam is well-positioned to strengthen its role in the global apparel supply chain. The country's focus on innovation, sustainability, and infrastructure investment will solidify its status as a go-to destination for brands looking to diversify production and future-proof their operations.

LOCAL

All eyes are on Vietnam as it races towards an upgrade in 2025. After a year of booming exports and surging investment in 2024, the country is ready to redefine its place on the global stage.



Aiming to achieve Emerging Market recognition by 2025.

Emerging Market Status

Vietnam is looking to transition from a 'Developing Country' to an 'Emerging Market' by end of 2025, aiming for recognition by global organizations like FTSE Russell. This milestone would attract billions of dollars in foreign investment, further modernizing the economy and strengthening Vietnam's role in global trade. For the apparel industry, this means enhanced infrastructure, improved access to technology, and increased capacity to meet growing international demand.



Reaching \$39.84 billion in textile and garment export, increase 10.13%.

Growth in Exports

The textile and garment sector achieved \$39.84 billion in export revenues in 2024, marking a 10.13% increase year-on-year. Vietnam's strategic advantages—favorable trade agreements, robust logistics, and a skilled workforce—positioned it as a preferred manufacturing hub. Major markets like the U.S, EU, and Japan boosted their purchasing power, driving demand for Vietnamese-made products.



Rising tariffs and geopolitical tensions are shifting global supply chains to Vietnam.

Shifts in Global Supply Chains

As rising tariffs and geopolitical tensions disrupt China's dominance, brands are turning to Vietnam for reliable solutions. While this transition offers significant opportunities, it also demands proactive measures to mitigate risks and maintain supply chain resilience. By fostering strong partnerships and aligning with Vietnam's evolving capabilities, brands can secure a competitive edge in this shifting global landscape.



Enhancing manufacturing efficiency through digital tools and automation while prioritizing sustainability.

Focus on Innovation and Sustainability

Vietnam is embracing innovation, with increasing adoption of digital tools and automation in manufacturing. While still in its early stages, these efforts are paving the way for greater efficiency and competitiveness. Sustainability remains a key focus, driven by global regulations and client expectations. The industry is beginning to align with eco-friendly production standards, though challenges persist in scaling these initiatives.

Looking Ahead

Vietnam's anticipated upgrade to emerging market status by 2025 will unlock new opportunities for the apparel sector. Enhanced infrastructure, including mega-projects like the Long Thanh International Airport and North-South Expressway, will improve trade efficiency. Coupled with its strategic location and commitment to innovation, Vietnam is set to remain a leader in global supply chains.

As Vietnam continues to grow, its apparel industry is poised to capitalize on these developments, driving further success and solidifying its position as a cornerstone of the global market.

[CONSUMER TRENDS]

The fashion industry is undergoing a rapid transformation, with consumer demands reshaping how brands operate.

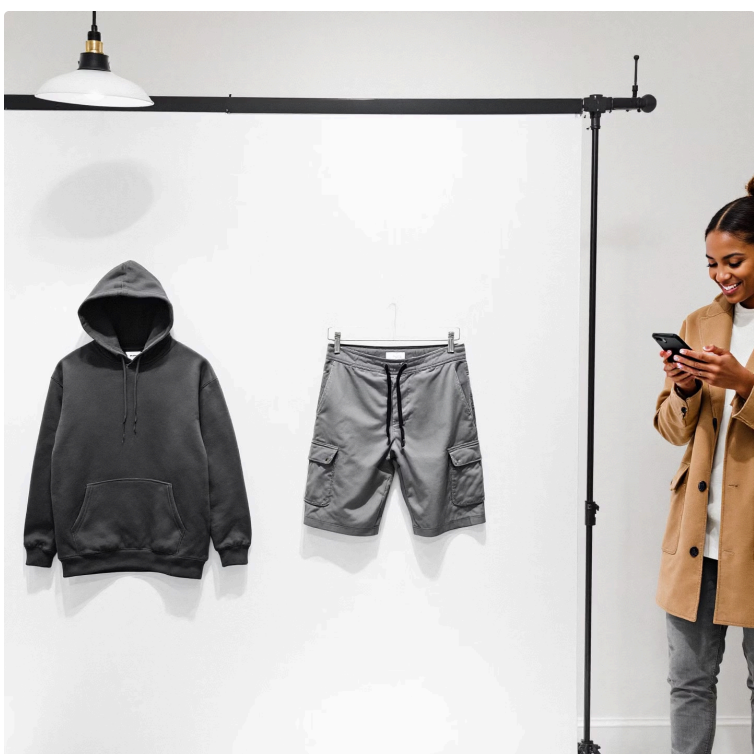
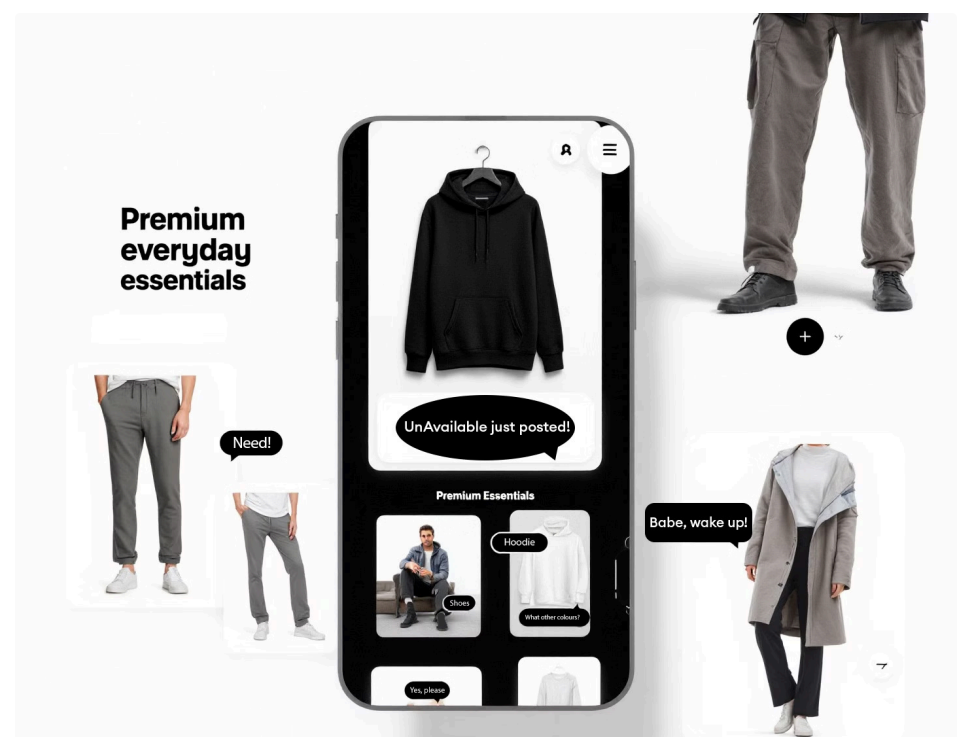


1. EVERYDAY ESSENTIALS

Consumers prioritize comfort and functionality. Elevated essentials like premium hoodies, relaxed-fit pants, and versatile outerwear dominate wardrobes, expected to deliver on quality and durability.

2. SPEED TO MARKET

Speed has become a necessity. Social media drives fast-moving trends, with younger brands using agile production and direct audience interaction to stay ahead.



3. CHANGING RELEASE STRATEGIES

Traditional seasonal drops are being replaced by quicker, more responsive collections. Consumers expect their favorite styles to be available soon after seeing them online.

The key question emerging is: ***Are brands staying ahead of the game?***

*"The future of fashion is **fast** and **consumer-focused**. Timeless, **quality** and elevated basics remain **essential**, but **speed-to-market** is now a critical factor for **success**."*

EMERGING BRANDS LEADING THE WAY

New emerging brands are thriving by acting fast. They engage directly with their followers, respond to trends instantly, and drop collections faster than established competitors. This agility, paired with digital-first strategies, builds loyalty and keeps them relevant in a fast-changing market.

ESTABLISHED BRANDS: ADAPTING TO THE PACE

Legacy brands must adapt to stay competitive. While their reputation and quality product are strong, integrating speed into their production schedules and release strategies is essential. Those who can maintain their brand DNA while embracing agility will stand out in a crowded market.



WHAT DOES THIS MEAN FOR US?

As manufacturers, we're here to help brands move faster without compromising quality. By refining how we hold greige yarn, fabric and blank garments, along with production processes and staying flexible, we ensure products hit the market efficiently and consistently. In a competitive world, speed matters—and we're here to make it happen.

WHAT DOES THAT MEAN TO YOU?

As brands, we need to be able to bridge the gaps in time constraints, approval processes, sign off's, communication, the connection between the teams and strategically work towards a faster process. Building frameworks, goals and broader systems that align.

INNOVATION

Innovation in our company has been instrumental in driving progress throughout 2024, laying the groundwork for smarter, more efficient operations. By prioritizing data management and simplifying processes with technology, we've built a strong foundation for future growth.

2024: PROGRESS MADE

DATA MANAGEMENT AS THE BACKBONE

We focused on data management, recognizing it as the driving force behind future automation and AI. By centralizing information across the company, we've improved data accuracy, accessibility, and visibility.

SIMPLIFYING SOPS THROUGH TECHNOLOGY

We simplified SOPs by leveraging Microsoft Suite tools streamlining workflows, improving communication, and ensuring easy access to critical information across teams.

ERP SYSTEM DEVELOPMENT

This year marked the launch of our ERP system, centralizing core business operations and providing real-time visibility across functions. This step set the stage for greater automation and efficiency in the years to come.

2025: KEY FOCUS AREAS

As we look to 2025, our focus will be on transformative initiatives that build upon our foundation.

1

SUPPLY CHAIN OPTIMIZATION

In 2025, we will look at exploring technologies like **RFID** that integrate into our ERP system to enable real-time inventory tracking and supply chain visibility. These advancements will improve accuracy, minimize delays, and enhance our ability to adapt quickly to customer needs

2

ERP EXPANSION AND AUTOMATION

ERP will truly come to life in 2025, with the system nearing **100% operational capacity**. We will see automation links seamlessly connect dashboards, reports, and key information to improve transparency and efficiency.

3

MICROSOFT SUITE ENHANCEMENT

We will continue to enhance workflows through the **Microsoft Suite**, particularly **Power Automate**, to automate repetitive tasks, connect processes, and improve overall efficiency.

4

PORTLESS OPPORTUNITIES

We will explore opportunities to collaborate with **Portless.com** to optimize logistics and freight management.



A NEW APPROACH TO LOGISTICS

We're collaborating with Portless, an innovative logistics partner just 5 minutes away, to explore opportunities for 2025. Their e-commerce shipping platform helps brands stay nimble and boost profitability.

40%

HIGHER MARGINS

Cut unnecessary shipping and fulfilment costs to increase profitability

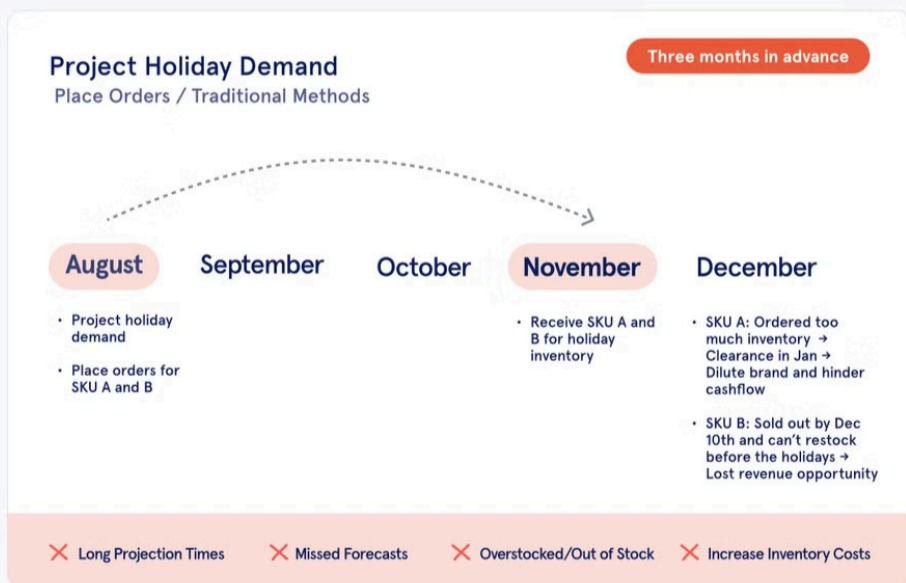
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DAYS TO DELIVER

Direct-to-consumer fulfilment dramatically reduces delivery times

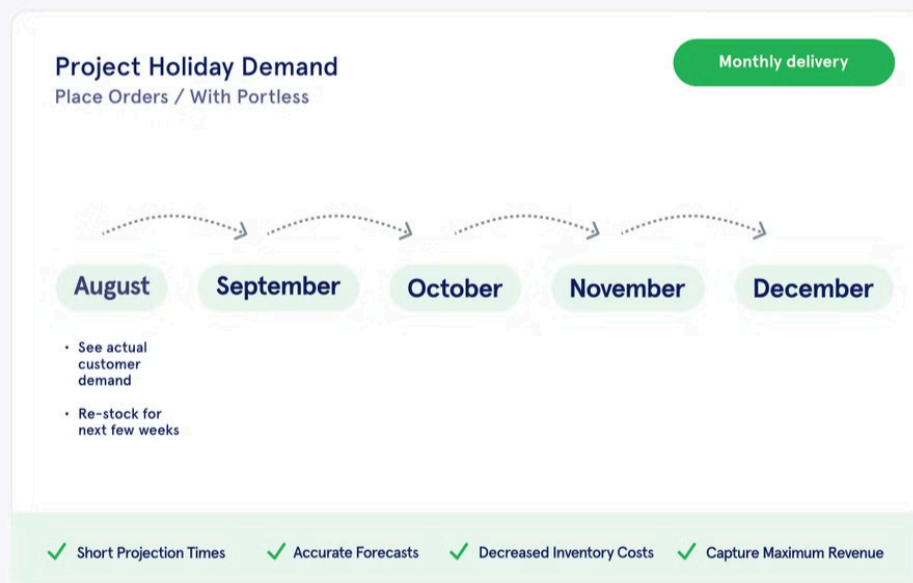
Traditional Methods

- Project inventory demand three months in advance
- Inability to react to events or trends
- Result:
 - Buy too much inventory (clearance → dilute brand)
 - Out of stock (lost profit opportunity)



With Portless

- Forecast inventory demand just weeks in advance
- Inventory is available for sale 2 days post-manufacturing, so you will always have the correct amount of stock
- Instant reaction to trends or hot items



FASTER TO MARKET

Quick shipping ensures products hit markets rapidly, providing a competitive advantage in the marketplace.

IMPROVED CASH FLOW

Shorter warehousing and transit times keep inventory lean. Transform inventory into cash in days instead of months by shipping products right after manufacturing.

REDUCED RISK

Avoid overstock or understock scenarios by eliminating the need to project inventory demand months in advance.

[Click here to see more](#)



[SHIPPING]: SEA

Vietnam's sea freight industry showcased exceptional growth and resilience in 2024, reinforcing its position as a global logistics hub. With increasing cargo volumes, reliable performance across key regions, and continuous infrastructure investments, Vietnam remains a preferred partner for international trade.

RECORD CARGO VOLUMES AND INFRASTRUCTURE GROWTH

501.1M

TONNES OF CARGO

handled in the first seven months alone—a 16% year-on-year increase, driven by robust exports of textiles, electronics, and machinery.

Cai Mep-Thi Vai and other southern ports led the charge, efficiently managing growing trade volumes with improved capacity and modernized facilities.

RELIABLE TRANSIT TIMES ACROSS MAJOR MARKETS

Vietnam upheld consistent transit times, despite global disruptions:

USA

Improved port efficiency ensured steady trade routes to Long Beach (West Coast). Lead times remained competitive at approximately 20 days, supporting rising demand. Whilst East Coast was at around 45 days.

UK AND EUROPE

Shipments to ports like Rotterdam and Felixstowe experienced slight increases mid-year but stabilized. Lead times for the UK was at around 45 days on average, while Rotterdam was at around 31 days.

ASIA

Regional routes to hubs such as Hong Kong, Shanghai averaged 3-9 days and Tokyo, South Korea averaged 15-18 days, with minimal delays.

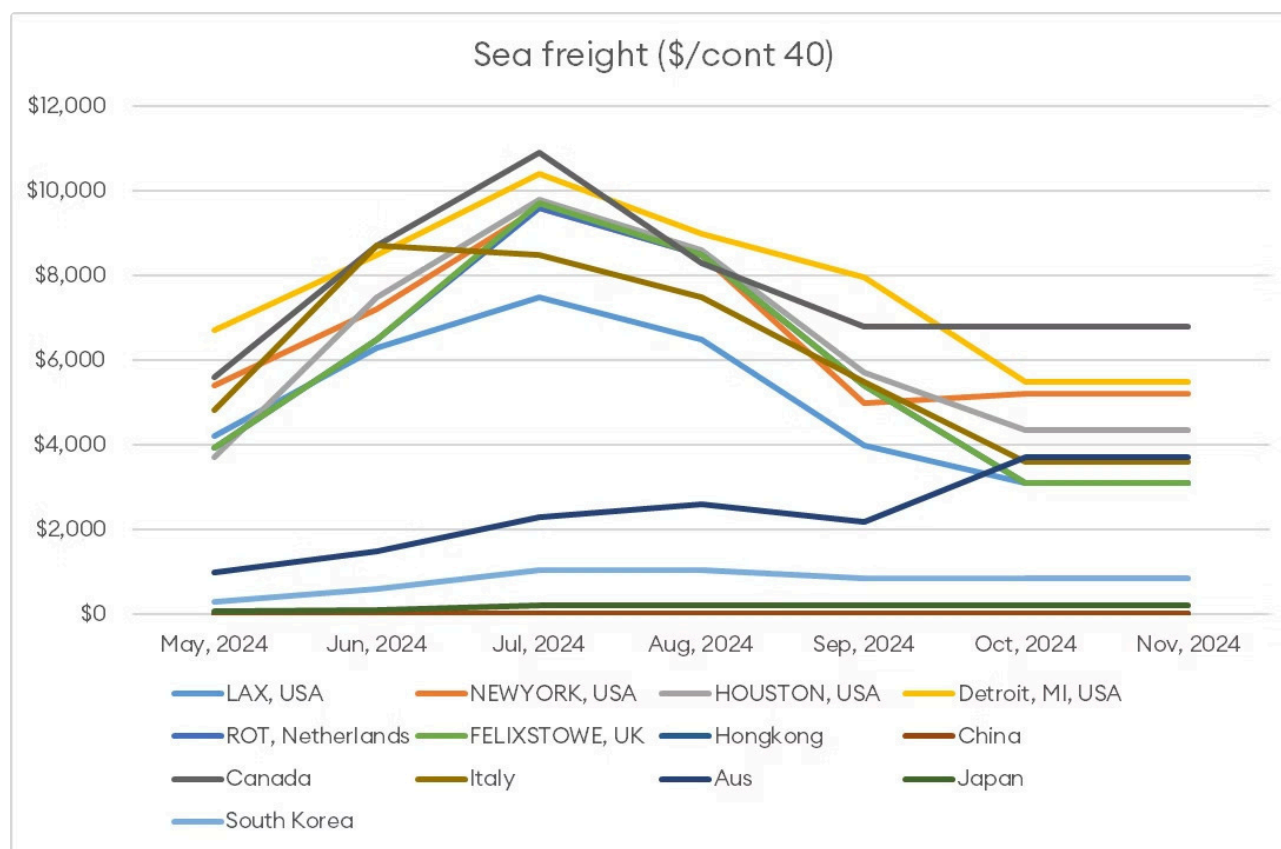
AUSTRALIA

Strong demand for Vietnamese exports kept transit times to Sydney steady at 15-18 days, ensuring smooth deliveries to the region.

COMPETITIVE FREIGHT COSTS

Vietnam maintained cost advantages across major trade routes, providing businesses with reliable, cost-effective solutions:

Region	Freight Cost Range
Asia-Pacific	\$5 per container (short-haul routes)
USA	\$4,600 to \$7,100
Europe (Rotterdam, Felixstowe)	\$5,400
Australia	\$3,100



Vietnam's ability to offer competitive pricing enabled businesses to navigate rising global logistics costs effectively.

SIGNIFICANT INFRASTRUCTURE INVESTMENTS

- Deeper shipping lanes to accommodate larger vessels.
- Port expansion projects that enhanced handling efficiency and reduced turnaround times.

[SHIPPING]: AIR

Vietnam's air freight sector increased in 2024, delivering the speed-to-market solutions that businesses need to stay competitive in a fast-paced global economy. With reliable transit times, cost-effective rates, and growing cargo volumes, Vietnam strengthened its position as a key hub for international air trade.

FAST TRANSIT TIMES ACROSS KEY MARKETS

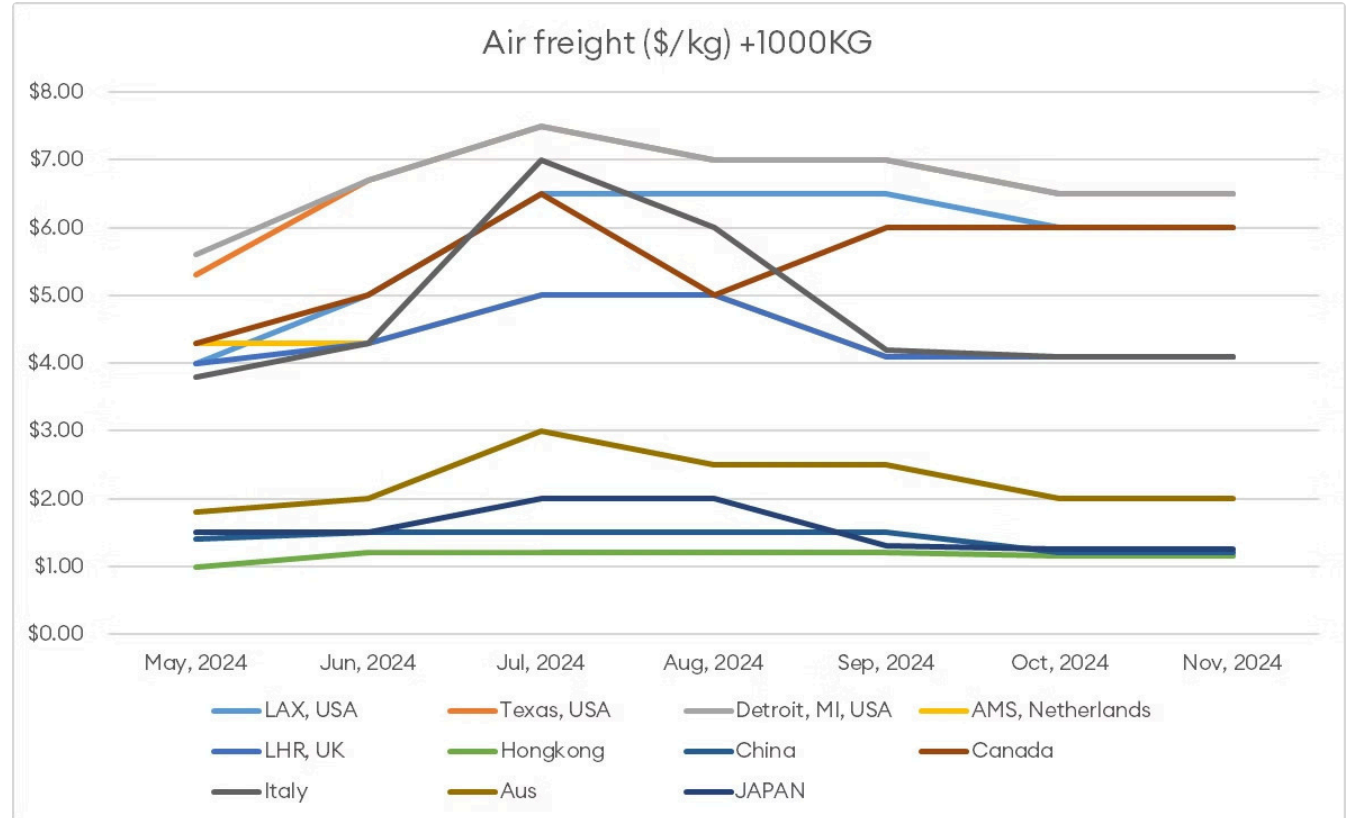
Vietnam provided consistent, reliable transit times to global destinations:

- USA**
 Major hubs like LAX and Texas achieved fast lead times of 5-10 days, supporting high-value and urgent shipments.
- EUROPE**
 Connections to key markets like Amsterdam (AMS) and London Heathrow (LHR) delivered in 3-5 days.
- ASIA-PACIFIC**
 Regional routes to hubs like Hong Kong, China, Japan, and South Korea performed exceptionally well, averaging 1-3 days.
- AUSTRALIA**
 Steady transit times of 1-5 days supported growing trade demand across the region.

COMPETITIVE FREIGHT RATES SUPPORT GLOBAL TRADE

Vietnam remained a cost-effective option for businesses seeking fast and flexible delivery:

- USA:** Rates peaked mid-year at \$6.50-7.50/kg during seasonal demand surges but stabilized to \$6.00-7.00/kg by Q4.
- Europe:** Costs averaged \$4.20/kg, balancing affordability with speed for businesses exporting to key European hubs.
- Asia-Pacific:** Short-haul routes to Hong Kong, China, and Japan held steady at \$1.15-\$1.60/kg, offering unmatched value for regional trade.
- Australia:** Rates remained stable at \$2.55/kg, supporting efficient cross-border deliveries.



Vietnam's competitive pricing and strong infrastructure allowed businesses to optimize their supply chains without sacrificing speed or affordability.

GROWING AIR CARGO VOLUMES DRIVEN BY EXPORT DEMAND

Vietnam's air freight growth was fueled by rising exports across key industries:

TEXTILES AND APPAREL

A surge in demand for Vietnamese-made garments drove consistent cargo volumes to USA, Europe, and Asia.

ELECTRONICS AND HIGH-VALUE GOODS

Vietnam's role as a manufacturing hub for high-tech products increased the need for fast, reliable air shipping solutions.

Growing airport infrastructure and cargo handling capabilities ensured smooth operations:

- Expansion of international airports, such as *Long Thanh International Airport*, with its first phase opening by 2025, is set to significantly boost cargo handling capacity to 5 million tons annually.
- Improved ground handling efficiency to minimize delays and speed up deliveries.



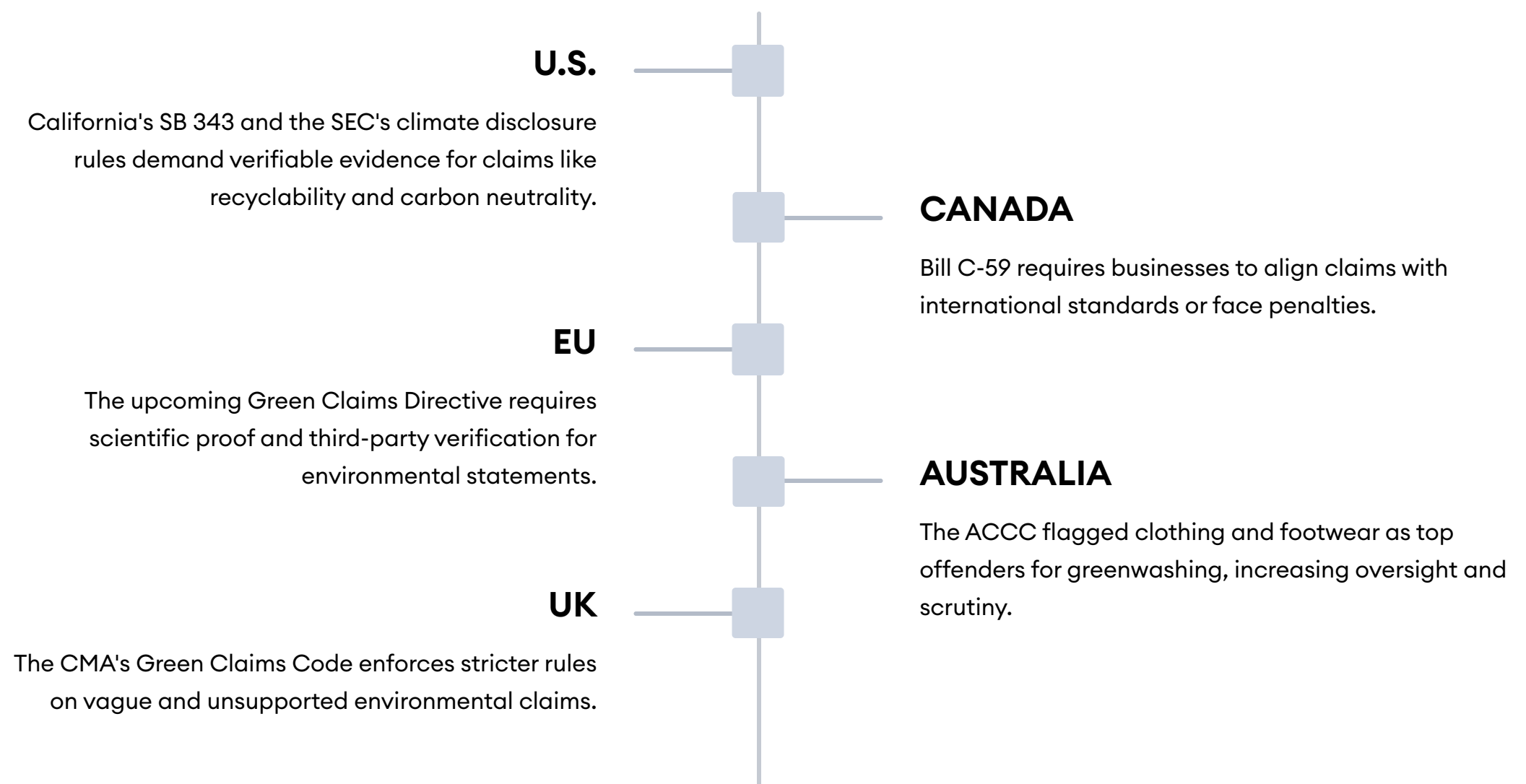


[SUSTAINABILITY]

Sustainability has become a global priority, with new laws, protocols, and consumer expectations raising the bar for brands and manufacturers everywhere. From the U.S. to Europe, Australia, and Asia—including countries like Vietnam—everyone is being pushed to adapt. The challenge is clear: meet stricter regulations, ensure transparency, and stay ahead of the curve while balancing cost, efficiency, and quality.

THE GLOBAL PUSH FOR ACCOUNTABILITY

Governments are cracking down on greenwashing—misleading environmental claims that no longer go unnoticed:



These regulations are forcing brands to look beyond marketing buzzwords and ensure their sustainability initiatives are measurable, credible, and transparent.

NAVIGATING THE PATH TO SUSTAINABILITY

No country or brand is exempt from these changes—including Vietnam. Everyone must work to align with the new standards, whether through better processes, innovation, or clearer communication. Brands and manufacturers are increasingly focused on:

<p>RESOURCE EFFICIENCY</p> <p>Optimizing energy, water use, and material waste to lower costs and environmental impact.</p>	<p>SMARTER TECHNOLOGIES</p> <p>Exploring automation and tools like AI to reduce inefficiencies and build transparency.</p>	<p>CIRCULAR SOLUTIONS</p> <p>Programs for recycling, resale, and tracking product lifecycles to align with circular fashion goals.</p>
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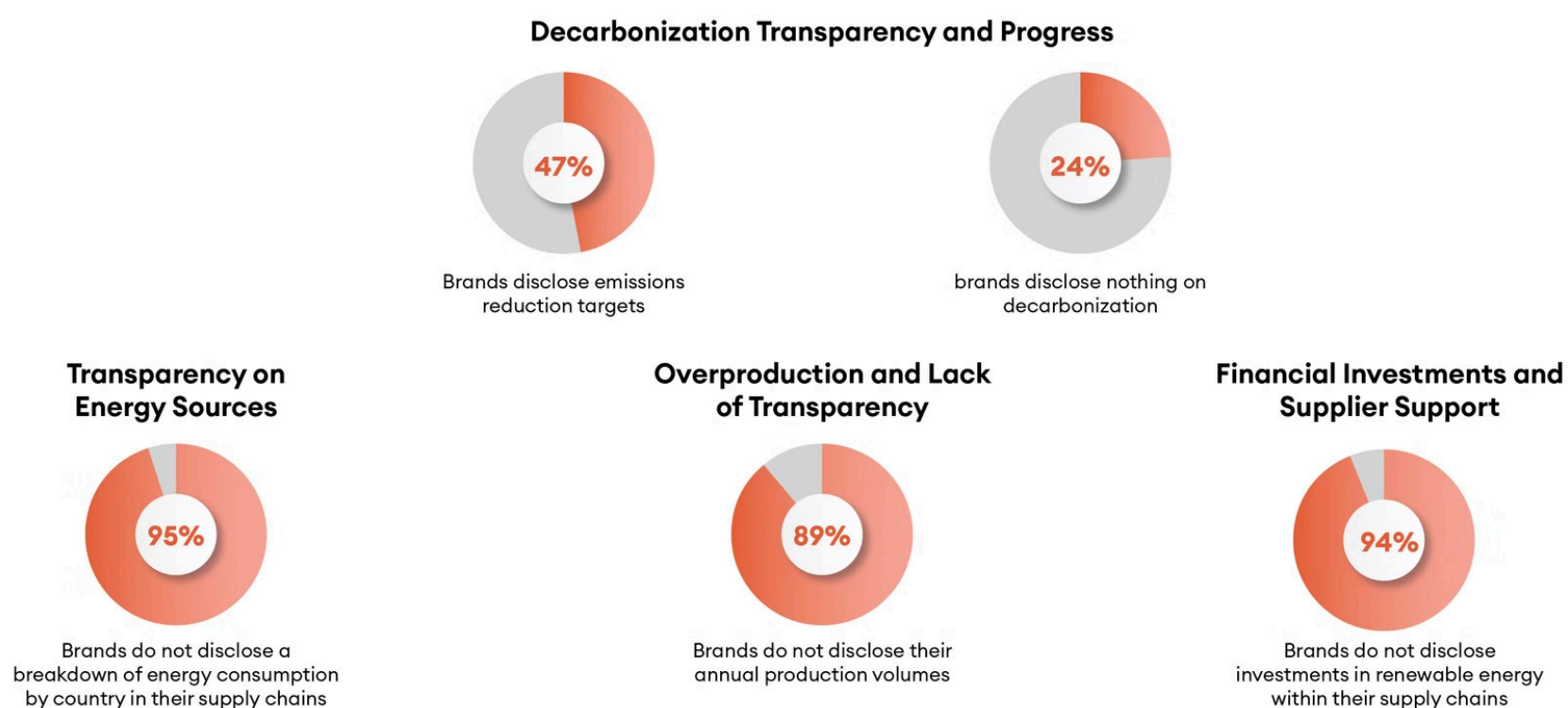
This isn't just about compliance; it's about ensuring supply chains are ready for the future—efficient, transparent, and adaptable.

DECARBONIZATION: A GLOBAL CHALLENGE

Reducing emissions remains a major challenge across the industry:

<p>SCOPE 3 EMISSIONS</p> <p>Representing 96% of the industry's footprint, these are the hardest to address but the most critical to reduce.</p>	<p>TRANSPARENCY GAPS</p> <p>Over 89% of brands still don't disclose production volumes, creating blind spots in decarbonization efforts.</p>
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Brands need to work closely with manufacturers who are investing in renewable energy, efficiency, and measurable sustainability progress.



Source: *What Fuels Fashion? Report*, by Fashion Revolution

WHAT THIS MEANS FOR BRANDS?

As regulations tighten and expectations grow, brands must take action:

- Work with manufacturers who prioritize clear, transparent processes.
- Ensure sustainability initiatives are credible and forward-thinking—not just marketing claims.
- Stay adaptable to navigate shifting laws, protocols, and market demands.

The bottom line? Every country, every brand, and every manufacturer must evolve to keep up and stay ahead. Sustainability isn't just a trend—it's the standard.



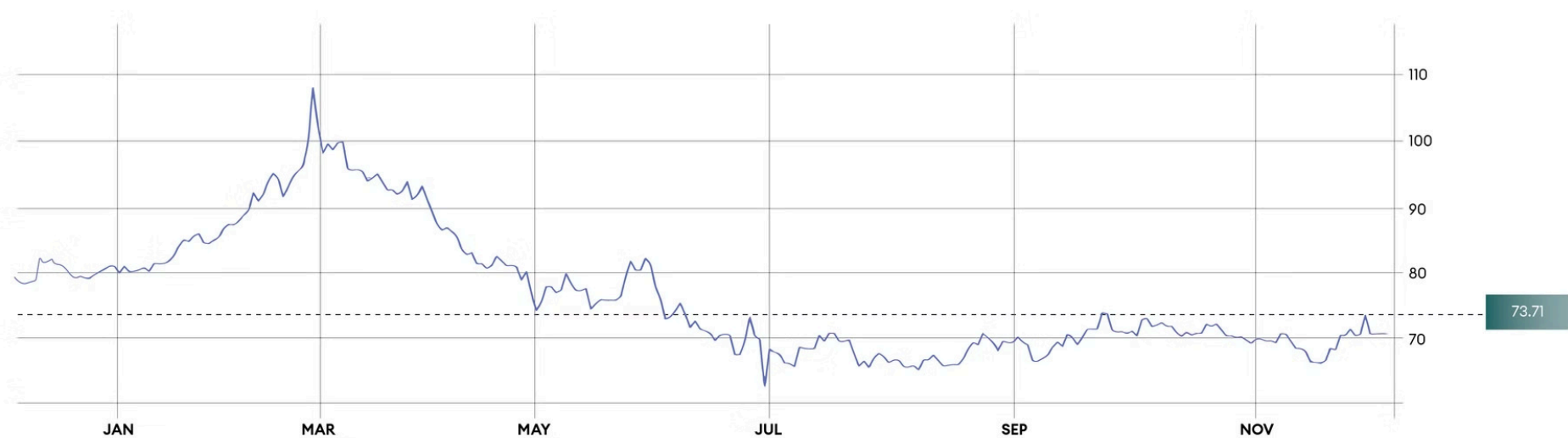
[RAW MATERIALS AND SUPPLY CHAIN]

As the fashion industry evolves, 2024 brought significant shifts across raw materials and supply chains. Brands and manufacturers faced fluctuating material availability, rising lead times, and growing labour demands—all while navigating global economic pressures.

This year underscored one clear reality: agility, planning, and adaptability are critical for long-term resilience.

THE RAW MATERIAL LANDSCAPE

Cotton remains a cornerstone of production, but the market in 2024 reflected a dynamic mix of supply and cost shifts.



Source: Trading Economics

GLOBAL SUPPLY

Production grew in the U.S., Brazil, and Turkey, offsetting declines in China and India caused by adverse weather.

PRICE TRENDS

Cotton prices stabilized around 74–76 cents per pound, providing short-term relief but still requiring brands to secure consistent sourcing.

SMART PLANNING

Holding greige yarn—undyed and ready for production—has emerged as a critical strategy for flexibility, allowing manufacturers to react faster to demand surges.

Polyester and synthetics provided cost-effective options, particularly for brands balancing price sensitivity in markets like the USA and Europe. However, challenges remain:

RECYCLED POLYESTER

While demand for rPET grew in response to sustainability goals, supply chain inconsistencies and elevated costs limited its widespread adoption.

BLENDED MATERIALS

Innovative fabric blends have become a solution, combining performance, affordability, and quality to meet diverse consumer needs across Asia, Australia, and North America.

SUPPLY CHAIN REALITIES: LABOUR AND SOURCING IN FOCUS

This year brought new attention to labour capacity and supply chain resilience across regions:

USA AND EUROPE

Rising labour costs and tightening sustainability regulations pushed brands to evaluate production networks. Workforce planning and cost management became central to maintaining margins.

ASIA

Competing demands for skilled labour in China, Bangladesh, and Vietnam highlighted the need for sourcing diversification. Manufacturers increasingly invested in upskilling workforces and improving factory efficiency to keep pace with demand.

Brands learned that labour shortages, wage increases, and production disruptions require more than short-term fixes. Balancing cost, workforce quality, and scalability has become essential to a strong, future-proof supply chain.

RESILIENCE THROUGH DIVERSIFICATION AND PLANNING

2024 demonstrated that building a reliable supply chain is not about reacting but about anticipating change:

1 DIVERSIFIED SOURCING

Shifting sourcing strategies to reduce dependency on single markets and avoid production bottlenecks.

2 RAW MATERIAL READINESS

Holding greige yarn and core materials has given manufacturers the speed-to-market advantage brands need.

3 TECHNOLOGY INTEGRATION

Data-driven tools, like ERP systems and real-time production tracking, are improving supply chain visibility and efficiency.

THE BIG TAKEAWAY

The fashion industry can't rely on "business as usual" anymore. Global labour needs, material volatility, and shifting production costs are now constants. For brands looking to thrive, the answer lies in:

ADAPTABLE SUPPLY CHAINS

That balance quality, cost, and speed.

STRATEGIC PLANNING

Around raw material stock and labour resources.

PARTNERSHIPS

That provide consistency amid change.

UA will have huge focus on raw materials and supply coming into 2025!



UPGRADES AT [UA]

This year, we introduced cutting-edge technologies and workspace improvements that have strengthened our production processes and overall efficiency. From modernizing equipment to reimagining our workspaces, these investments reflect our commitment to delivering precision, speed, and a collaborative environment for continued growth.

X-RITE TECHNOLOGY: PRECISION IN COLOR MANAGEMENT

Color matching has always been one of the most challenging aspects of production, often relying on manual checks that lead to delays and inconsistencies. To solve this, we integrated X-Rite Technology into our lab.



WHAT'S NEW

Advanced spectrophotometers and digital tools now measure and communicate colors with pinpoint accuracy.



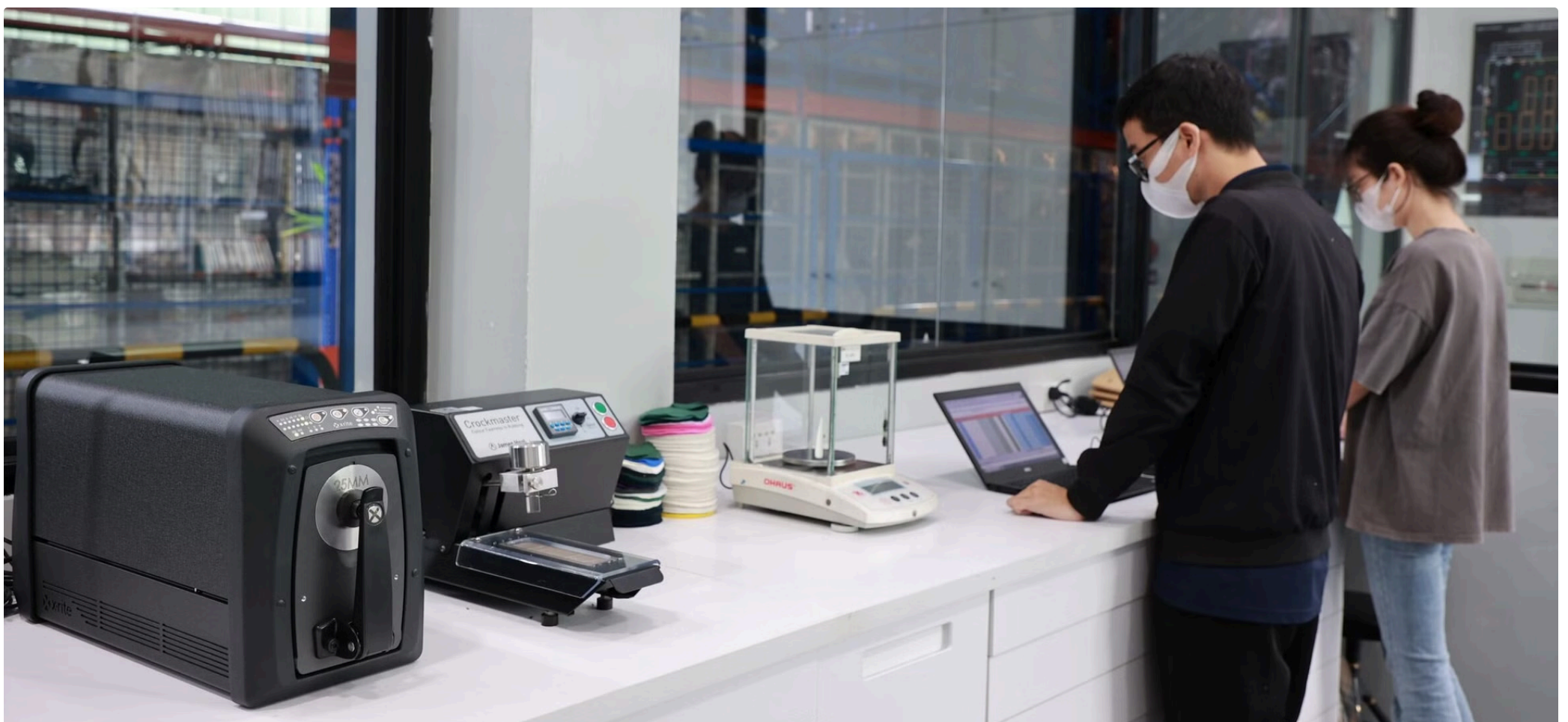
WHY IT MATTERS

Faster turnaround: Digital approvals reduce sampling time from weeks to just days.

Consistent results: No more subjective color mismatches, ensuring every batch meets your expectations.

Sustainable: Fewer physical samples mean less waste and a smaller environmental footprint.

By digitizing the color workflow, we're delivering consistent, reliable colors, faster than ever before.



DIRECT-TO-SCREEN TECHNOLOGY: FASTER, CLEANER SCREEN PREPARATION

Our screen preparation process has been fully automated with Direct-to-Screen Technology, replacing outdated manual methods. Key advancements include:

1

AUTOMATED SCREEN PRINTING STRETCHING MACHINE

A fully automated silk screen stretching machine ensures consistent tension across both the weft and warp (of the screen mesh). By maintaining uniform tension of **25–30 newtons per cm**, it minimizes print inconsistencies and ensures high-quality, durable results.

2

AUTOMATIC GLUE COATING MACHINE

Delivers uniform emulsion application, reducing preparation errors and improving print accuracy.

3

SPC LASER ENGRAVING MACHINE

Directly engraves designs onto screens with precision, eliminating manual errors and improving efficiency for even the most intricate designs.

What It Means for Production

- Faster preparation, consistent results, and minimized waste.
- Streamlined workflows for improved efficiency and reduced downtime.



UPGRADING OUR AUTOMATICS WITH NEW MACHINERY: SPEED AND ACCURACY COMBINED

To further enhance production, we're replacing our older M&R machine with a state-of-the-art machine that we are exploring different options.



WHAT'S NEW

Faster printing speeds, advanced automation, and higher precision capabilities.



WHY IT MATTERS

The new machine will allow us to produce more, faster, while ensuring every piece meets your quality standards.

This upgrade reflects our commitment to adopting cutting-edge technology that keeps us—and your brand—one step ahead.

EXPANDING OUR FACILITY

Growth comes with its own challenges, and we've responded by optimizing our workspace layouts to improve efficiency and collaboration.

REIMAGINED WORKSPACES

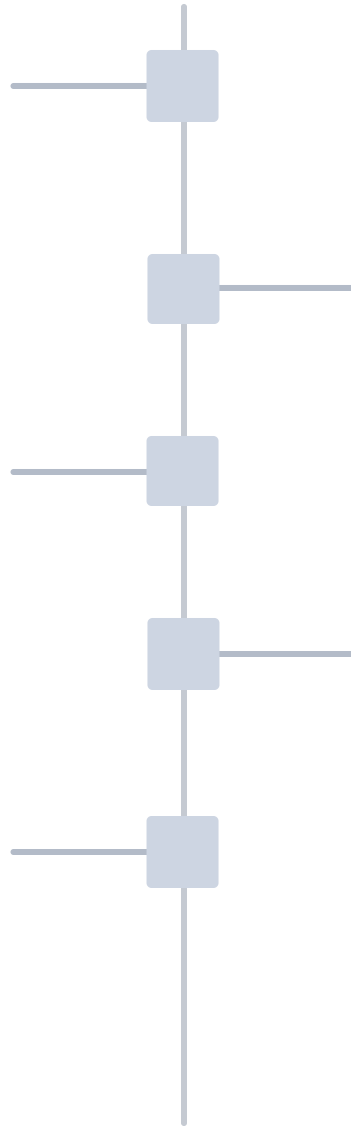
With better storage and layouts for smoother workflows.

MATERIAL ROOM & ARCHIVE

To neatly organize supplier samples and swatches.

REVAMPED SAMPLING ROOM AND LABORATORY

With dedicated spaces for faster, more precise prototyping and testing.



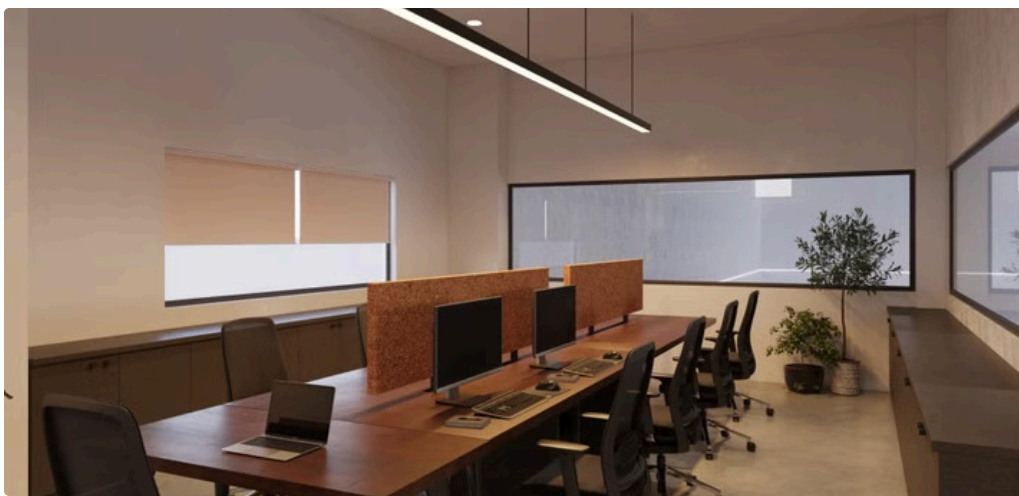
RELAXED LOUNGE AREAS

To encourage team discussions and creativity, or supplier conversations.

EXPANDED PURCHASING AND QA OFFICES

To accommodate growing teams and streamline operations.

By improving our facilities, we're ensuring that every team has the tools and space to deliver better results, faster.





[OUTLOOK FOR 2025]

As we kick off 2025, one thing's clear—change is coming, and it's coming fast. Between trade tensions, shifting tariffs, and new opportunities, brands need to be ready to adapt, grow, and expand their reach.

THINKING BEYOND BORDERS

For brands already making waves globally, this year is about going even further:

TARIFF TALK

With increased pressure on Chinese imports, it's smart to stay ahead and diversify supply chains.

NEW MARKETS, NEW OPPORTUNITIES

There's never been a better time to explore global growth and unlock new regions.

FLEXIBILITY WINS

Brands that move fast and adapt will lead the pack.

The goal? Keeping your supply chain strong and your business moving forward—no matter what.

HOW WE'VE GOT YOUR BACK

At UnAvailable, we're here to make sure you're set up for success:

- **Room to Grow:** Scalable production that's ready when you are.
- **No Delays:** Efficient workflows, reliable timelines, and smooth delivery to key markets.
- **Forward Thinking:** We're watching what's next, so you don't have to.

Brands are already making moves to future-proof their supply chains, and we're ready to help you do the same.

LET'S MAKE 2025 OUR YEAR!

This isn't the year to sit back—it's the year to adapt, move, and lead.

Markets are shifting, expectations are rising, and brands that stay ahead will win. Whether it's new opportunities, smarter solutions, or stronger partnerships, we're here to help you move quickly, grow globally, and keep things on track.

Let's keep it simple, reliable, and forward-thinking—so you can focus on leading the way.