

## STRATEGIC BRIEFING

# 30 Years Later: What Textile Leadership Must Learn Next

On Wednesday, 17th July 2026, Munich Fabric Start's 30-year anniversary webinar created a timely moment to look back at what has shaped textiles, and to ask what now needs to change. The discussion pointed to a clear signal: textile leadership is moving from sourcing efficiency to value-chain resilience.

## PREPARED BY

Future Fashion Assembly

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Supply Chain / Innovation / Sustainability / Commercial

## SOURCES

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IN ASSOCIATION WITH

**MUNICH  
FABRIC  
START**

The textile industry is not short of innovation, experience or intent. The challenge is turning that intent into practical, shared action across the value chain. Rising costs, compliance pressure, geopolitical instability, material complexity and more informed consumers are changing what textile leadership requires. The next advantage will sit with businesses that can connect quality, material intelligence, supplier partnership, adoption-ready innovation and circular thinking into commercial decision-making. This is not only a sustainability issue. It is a margin, resilience, trust and execution issue. Brands, retailers, buyers, manufacturers, innovators and investors now need better ways to share risk, prove value and move from short-term collaboration to longer-term commitment.

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Munich Fabric Start's 30-year anniversary webinar was not only a retrospective. It created a practical conversation about what the textile industry has learned, what can no longer be ignored and what leaders need to prepare for next.

The panel agreed that some foundations of the past should be protected. Textile progress has always depended on relationships, trust, face-to-face exchange, craft knowledge and long-term partnerships. These remain commercial assets, especially as technology, AI, sustainability demands and compliance requirements become more embedded in day-to-day business.

What has changed is the operating environment. Predictable sourcing has given way to constant adjustment. Textile businesses are now affected by geopolitical events, trade policy, energy and oil prices, supply chain routes, legislation, material availability and shifting customer expectations. This increases cost, shortens decision windows and places greater pressure on the value chain.

Consumer knowledge has also changed. Customers are asking more questions about material composition, performance, quality and sustainability. This creates pressure for brands and retailers to explain what products are made from, how they perform and why they deserve to stay in use. For mills, manufacturers and innovators, it creates an opportunity to become more visible partners in product value, proof and customer trust.

## FOR BRANDS

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- Textile decisions now sit closer to brand strategy, not only sourcing.
- Material choice affects compliance, performance, durability, circularity, customer trust and product credibility.
- Brands that treat textiles as a back-end sourcing decision risk missing the wider commercial value of quality, proof and product-level storytelling.

## FOR RETAILERS

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- Retailers are facing a quality challenge as well as a cost challenge.
- Consumers are looking more closely at what they buy, how long it lasts and whether it performs as expected.
- Retailers that compete mainly on low cost risk weakening trust.
- Those that can explain quality, longevity, care and value have a stronger basis for customer confidence.

## FOR BUYERS AND MERCHANDISERS

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- Buyers are under pressure to protect margin, but margin cannot remain the only measure of success.
- The webinar challenged the gap between buying authority and practical production understanding.
- Buyers need deeper exposure to factories, mills, finishing processes and material trade-offs.
- Better decisions will depend on balancing commercial targets with innovation, sustainability and supplier reality.

## FOR MANUFACTURERS, MILLS AND SUPPLY CHAINS

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- Manufacturers and suppliers are often asked to carry too much of the risk of change.
- They dedicate machine time, train teams, test new solutions and absorb implementation pressure.
- Much of the downstream value often sits with brands.
- More balanced models are needed, including longer commitments, shared pilots, preferred supplier status and clearer recognition of value-chain innovation.

## FOR INNOVATORS

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- The barrier is not simply cost or lack of invention.
- The barrier is the friction between innovation and implementation.
- New solutions ask teams to change a process, habit, KPI or supplier relationship.
- Innovators that reduce adoption friction through training, technical support, clear testing conditions and measurable outcomes will be better placed to scale.

## FOR INVESTORS

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- The conversation reinforces the difference between promising innovation and commercially scalable innovation.
- From an investor perspective, implementation readiness and long-term commitment from supplier or brand partners matters as much as the strength of the solution itself.
- Stronger signals include practical adoption pathways, manufacturer readiness, clear customer pull and evidence that solutions can work inside real production and buying cycles.

## Quality as a commercial strategy

Quality is no longer only a product standard. It is a commercial, sustainability and trust strategy.

### THE OPPORTUNITY

- Define quality through material integrity, construction, durability, performance, care and end-of-life planning.
- Use quality to protect product value and strengthen customer trust.
- Give customers clearer reasons to buy, keep and care for products.

## Lower-friction innovation adoption

Innovation adoption improves when new solutions are practical, measurable and easy to test.

### THE OPPORTUNITY

- Design pilots around clear outcomes, operational fit, training and low disruption.
- Focus not only on finding better solutions, but on making them easier to implement.
- Help manufacturers and teams see results quickly, without unnecessary operational risk.

## Shared risk and shared reward

Innovation will remain slow if manufacturers and innovators carry most of the implementation burden while brands receive most of the market-facing benefit.

### THE OPPORTUNITY

- Build shared incentives into pilot and supplier relationships.
- Use co-investment, longer-term commitments, preferred supplier status and shared marketing where relevant.
- Recognise value-chain innovation more clearly, not only brand-facing outcomes.

## Buyer KPIs that support long-term value

Buying teams need permission to make better long-term decisions.

### THE OPPORTUNITY

- Add sustainability, innovation adoption, durability, supplier partnership and impact alongside margin.
- Support better choices around materials, suppliers, production routes and pilot commitments.
- Reduce the conflict between short-term margin pressure and longer-term value creation.

## Product proof and supplier storytelling

Consumers are asking more detailed questions about materials, performance and sustainability.

### THE OPPORTUNITY

- Turn material knowledge, process improvements and supplier innovation into clearer customer value.
- Give brands and retailers credible product-level proof.
- Help mills and manufacturers communicate their contribution more clearly.

## Circular thinking built into product decisions

The panel challenged the belief that the industry can continue with a linear model.

### THE OPPORTUNITY

- Build circularity into material selection, design, production, care, repair, reuse and end-of-life planning.
- Keep valuable raw materials in use for longer.
- Reduce dependency on virgin resources where practical alternatives and systems exist.

**MARGIN-ONLY DECISION-  
MAKING**

If buying teams remain driven mainly by seasonal cost and margin targets, longer-term innovation, quality and sustainability work will continue to be delayed.

**PILOT FATIGUE**

Manufacturers and innovators can lose confidence when pilots produce useful learning but do not lead to commitment, scale or repeat orders.

**IMPLEMENTATION BURDEN ON  
MANUFACTURERS**

Factories and suppliers may resist innovation if they are expected to absorb machine time, training, risk and disruption without a clear return.

**WEAK PRODUCT PROOF**

Brands that cannot evidence material choice, quality, durability or sustainability claims risk weakening customer trust.

**ADOPTION FRICTION**

Strong solutions can stall if they require too much operational change, training or risk during pressured production cycles.

**COMPLIANCE OVERLOAD**

Regulation can drive positive change, but it also adds documentation, cost and operational pressure if ownership and data systems are unclear.

**CIRCULARITY WITHOUT AN  
OPERATING MODEL**

Circular ambition will remain theoretical unless repair, resale, reuse, recycling or material recovery are designed into category and product decisions.

The following actions translate the opportunities above into practical next steps for leadership teams.

OPPORTUNITY	ACTION	OWNER	MEASURE
<b>Quality as a commercial strategy</b>	Define "quality" across material integrity, construction, durability, performance, care and end-of-life pathway. Use this definition to guide product, sourcing and customer communication.	Product, sourcing, sustainability and commercial leadership	Returns, complaints, durability performance, customer feedback, claim defensibility
<b>Lower-friction innovation adoption</b>	Design every pilot with clear success criteria, operational fit, training requirements and a decision route if the result is positive.	Innovation, sourcing, operations and manufacturing teams	Pilot-to-scale conversion, time to test, production disruption, repeat use
<b>Shared risk and shared reward</b>	Build shared incentives into innovation projects, including longer commitments, co-investment, preferred supplier status or shared marketing where relevant.	Brand leadership, sourcing, manufacturers, innovators and investors	Repeat pilots, co-investment, preferred supplier agreements, scaled outcomes
<b>Buyer KPIs that support long-term value</b>	Add innovation, sustainability, durability and supplier partnership measures alongside margin. Give buyers permission to make decisions that support long-term value.	Commercial leadership and buying directors	Pilots scaled, waste reduced, quality improvements, supplier retention
<b>Product proof and supplier storytelling</b>	Create supplier proof packs that translate material knowledge, process improvements and innovation into usable product-level information.	Suppliers, brand marketing, product and sustainability teams	Approved claims, customer-facing assets, buyer confidence, use of supplier proof
<b>Circular thinking built into product decisions</b>	Map one priority category against circular design, care, repair, reuse and end-of-life options. Start where the commercial and operational case is clearest.	Design, product, sustainability, sourcing and retail teams	Repairability, resale or reuse potential, material recovery options, category-level learnings

- Webinar transcript: 30 Years Later: What Must Textiles Learn Next?, Munich Fabric Start 30-year anniversary webinar, Wednesday June 17, 2026.
- Speaker and organisation information provided to Future Fashion Assembly.
- No external sources have been used.

**MUNICH FABRIC START****Munich Fabric Start**

Munich Fabric Start is one of Europe's leading textile trade shows, bringing together fabric, material and sourcing communities to exchange ideas, build partnerships and shape the future of the textile industry.

[munichfabricstart.com](https://munichfabricstart.com)

**Future Fashion Assembly****Future Fashion Assembly**

Future Fashion Assembly is a fashion innovation and intelligence platform helping brands, manufacturers and retailers discover, evaluate and implement commercially relevant innovation across the fashion value chain.

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