

WTS

WORLD
TEXTILE
SOURCING

THE NEW COMPETITIVE EDGE TRACEABILITY

TAIPEI, SEPTEMBER 2026,
MARIANNA SOUSA,
Chief Sustainability Officer





OPENING

traceability

Is traceability becoming a real competitive advantage for our industry? Or are we simply adapting to a new market with new rules?

OPENING

WTS
WORLD
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SOURCING

THE PROBLEM, IN ONE OBJECT

a label tells you where a garment was sewn.
it tells you almost nothing about where it came
from

THE LABEL SAYS

1 country

The final assembly step. The
only step most compliance
systems can actually see.

THE FIBER SAYS

3+ countries

Seed, gin, spinner, dyehouse
and mill routinely sit in three
countries before cutting
begins.

Regulation is increasingly asking us to see **every step behind**. And from 2027, it wants it in a digital file,
with a name behind every line.



WHERE THE VISIBILITY ENDS

audits stop at the sewing floor.
the cost, and the risk, are created upstream of it.

TIER 4 Raw Material	TIER 3 Fibre processing	TIER 2 Textile processing	TIER 1 Manufacturing WHAT THE LABEL NAMES	TIER 0 Brand
------------------------	----------------------------	------------------------------	---	-----------------

Roughly 60% of a garment's cost is created in Tier 2 and Tier 4 — fibre and fabric. Those are the two tiers almost nobody maps.

Most audit programmes stop at Tier 1, which is where less than a fifth of the cost is created. The visible tier is the cheap one.

WHERE WE ARE GOING

01	02	03	04	05
the map	the market	the rulebook	the gap	the edge
Where cotton is grown, made and worn. Three different worlds.	Ultimately everything comes down to the market.	Half of world demand is now legally required to ask for proof.	What the industry says it believes, and what it has actually built.	Where it all crosses

01 - THE MAP

WTS
WORLD
TEXTILE
SOURCING

01 the map

Grown here, spun there, sewn elsewhere

WORLD TEXTILE SOURCING

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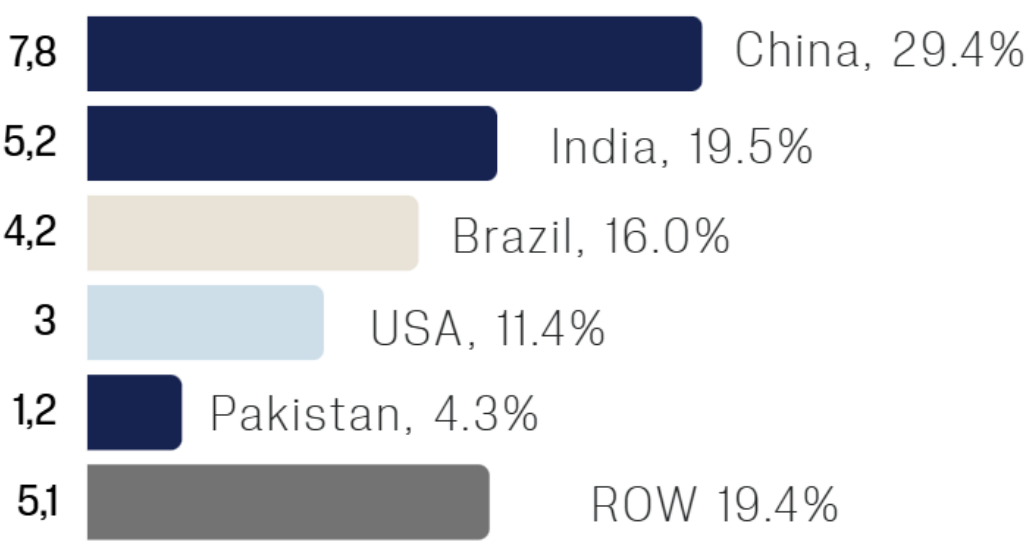


SUPPLY CHAIN COMPLEXITY

where cotton is grown, where it becomes fabric, and where the garment is bought are rarely the same place

O1
grown

Share of world raw cotton fiber, 2025/26 harvest

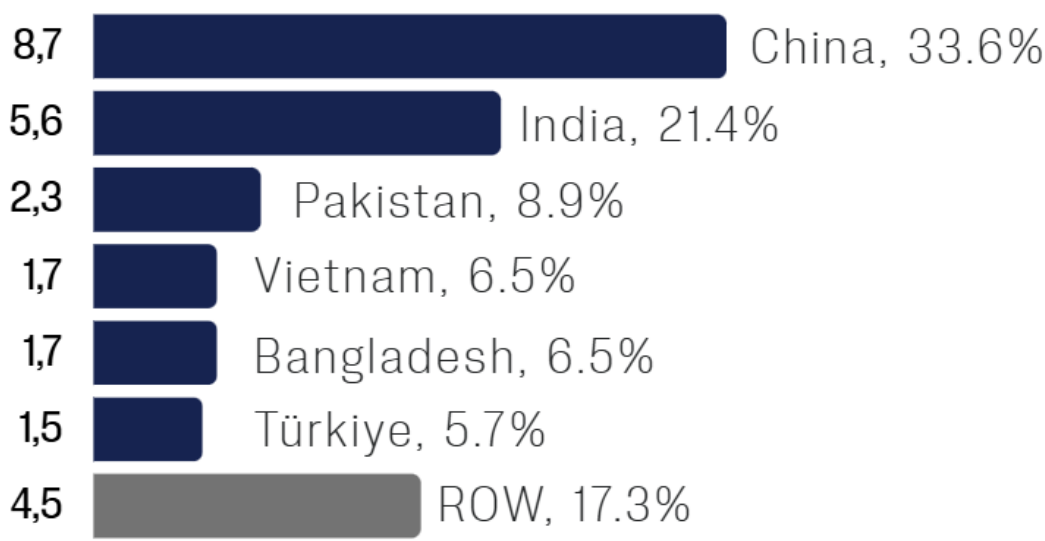


Million Metric Tons (1 bale = 480 lb / 217.7 kg)

Source: USDA Economic Research Service, *Cotton and Wool Outlook: April 2026 (CWS-26d)*, April 13, 2026.
<https://www.ers.usda.gov/media/20869/cws-26d.pdf>

O2
made

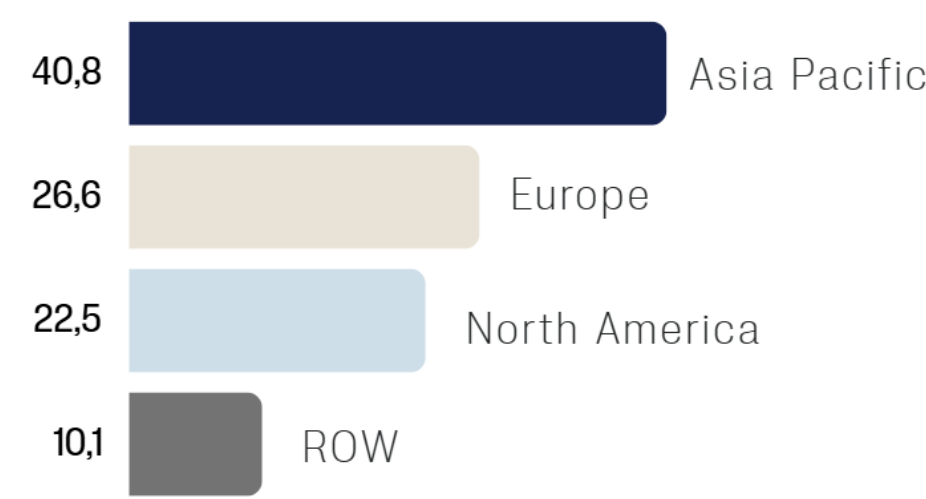
Share of cotton fibre consumed by mills, 2025/26



Million Metric Tons (1 bale = 480 lb / 217.7 kg)

O3
worn

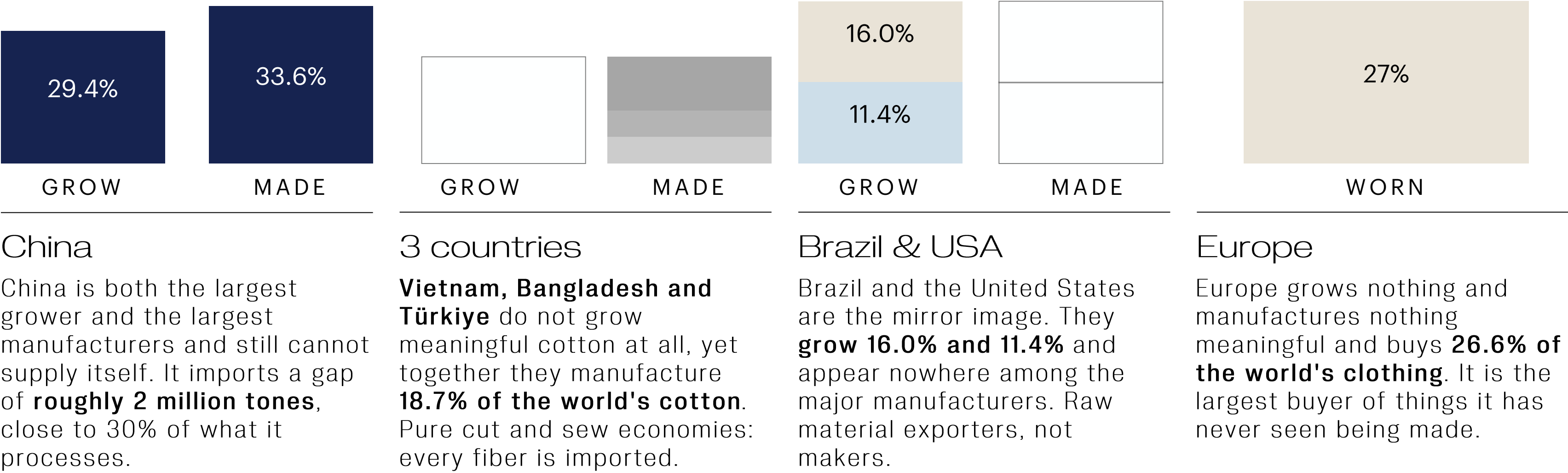
Share of global apparel market value, 2025



Shared market %

Source: Grand View Research, *Apparel Market Size, Share & Trends Report, 2026–2033*.

THE ASYMMETRY



U.S. COTTON EXPORTS

80%+

of U.S. cotton production is exported. The country barely consumes what it grows.

2023 just three countries took **52% of that volume**: China, Pakistan and Vietnam.

2025 China's purchases had fallen 85%, from US\$1.5 bn to US\$0.2 bn. In two years, the map redrew itself.

USDA WEEKLY EXPORT SALES, 2025/26

COUNTRY	COTTON TYPE	WEEKLY SALES	RANK
Vietnam Cut and sew hub. No domestic cotton, imports 100% of its fibre	Upland	164,100 RB	# 1
Pakistan Manufactures twice what it grows. Heavy fibre importer	Upland	60,500 RB	# 2
Bangladesh Garment export giant. Imports virtually all its fibre.	Upland	40,300 RB	# 3
India Nearly self-sufficient. Imports only to cover the gap	Upland	27,400 RB	# 4
Türkiye EU adjacent manufacturing hub	Upland	26,600 RB	# 5
India Largest Pima buyer. Premium fibre for fine goods.	Pima	3,300 RB	# 1
China Fine fibre demand for premium mills.	Pima	1,500 RB	# 2

1 running bale ≈ 500 lb / 226.8 kg.

SUPPLY CHAIN COMPLEXITY

under this complexity,
how are we supposed
to build traceability?

the market

02 the market

Ultimately, it all comes down to the market



THE TEXTILE GLOBAL MARKET

ultimately, it all comes down to the market
three of them decide what the world wears.



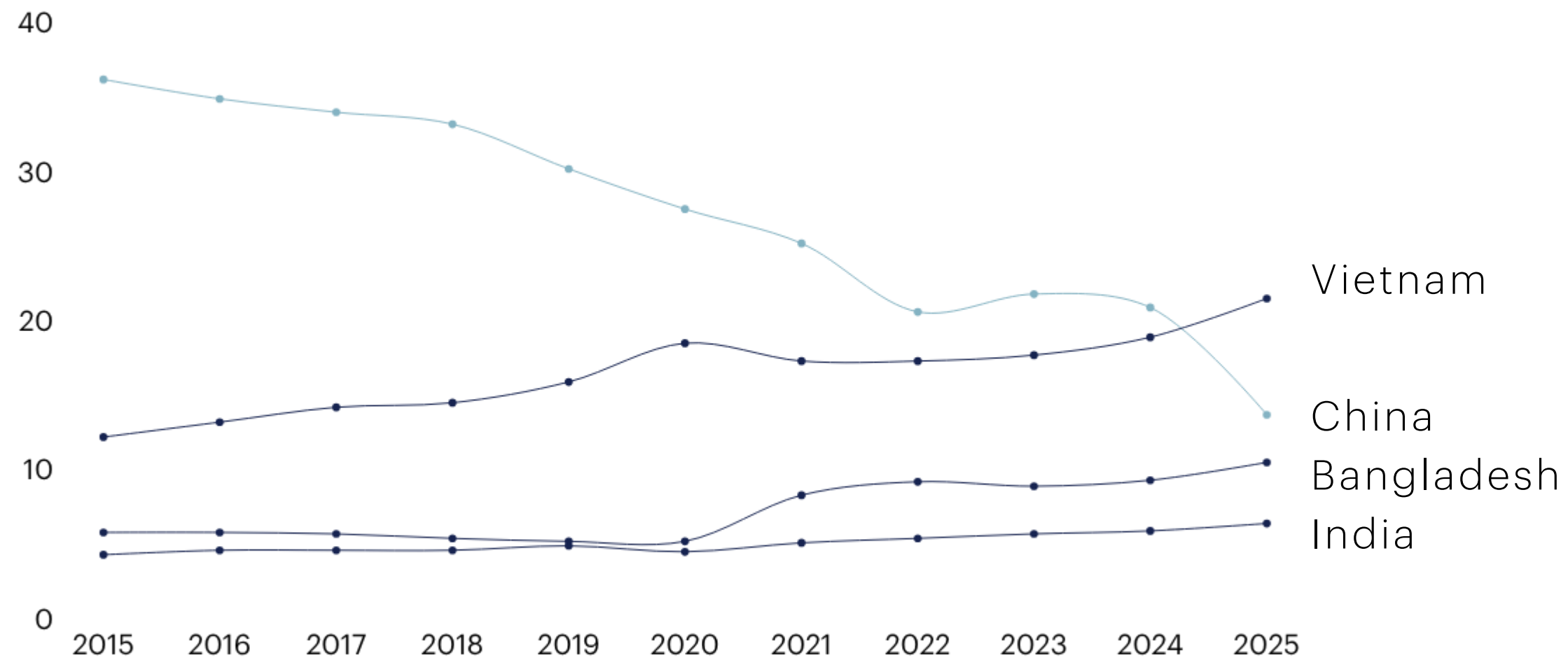
Share of global apparel market value,
2025

Asia manufactures more than 80% of the world's cotton and buys the largest single share of the clothing. It is the only region that wins at production, manufacturing and consumption at once.

But 49.1% of the value sits in Europe and North America — and those are exactly the two markets that have just **rewritten the rules on how the clothes they buy must be documented.**

US APPAREL IMPORT MARKET SHARE

in ten years, the single largest supplier
lost two thirds of its share



Source: OTEXA, U.S. Department of Commerce. Own elaboration.

36.2 → 13.7

China's share of US apparel imports, 2015 to 2025

12.2 → 21.5

Vietnam, the main beneficiary of the move out of
China

5.8 → 10.5

Bangladesh, doubling on cost and scale

Buyers did not leave China because of one
tariff. They left because concentration became
a risk they could **no longer document away**.

PRINCIPAL SUPPLIERS TO THE UNITED STATES

Exporter	Value imported 2025, US\$ thousand	Share of US imports	Growth 2023-2025
World	3,504,533,052	100%	+9.5%
Mexico	538,080,423	15.4%	+12.1%
Canada	392,195,849	11.2%	-9.0%
China	327,035,941	9.3%	-27.0%
Vietnam	201,035,941	5.7%	+69.0%
Germany	159,080,742	4.5%	-2.5%
India	107,714,948	3.1%	+22.8%
Peru	10,700,000	0.3%	+1.3%
Honduras	5,748,257	0.2%	-1.5%
Guatemala	5,636,757	0.2%	+6.4%
El Salvador	2,394,384	0.1%	-7.0%

US APPAREL MARKET SHARE

Mexico	3.3%
Honduras	2.9%
Guatemala	2.0%
El Salvador	1.7%
Peru	1.0%

The whole Western Hemisphere nearshore bloc is under 11% of US apparel.

THE UNCOMFORTABLE FINDING
tariffs do not define the sourcing base

0%

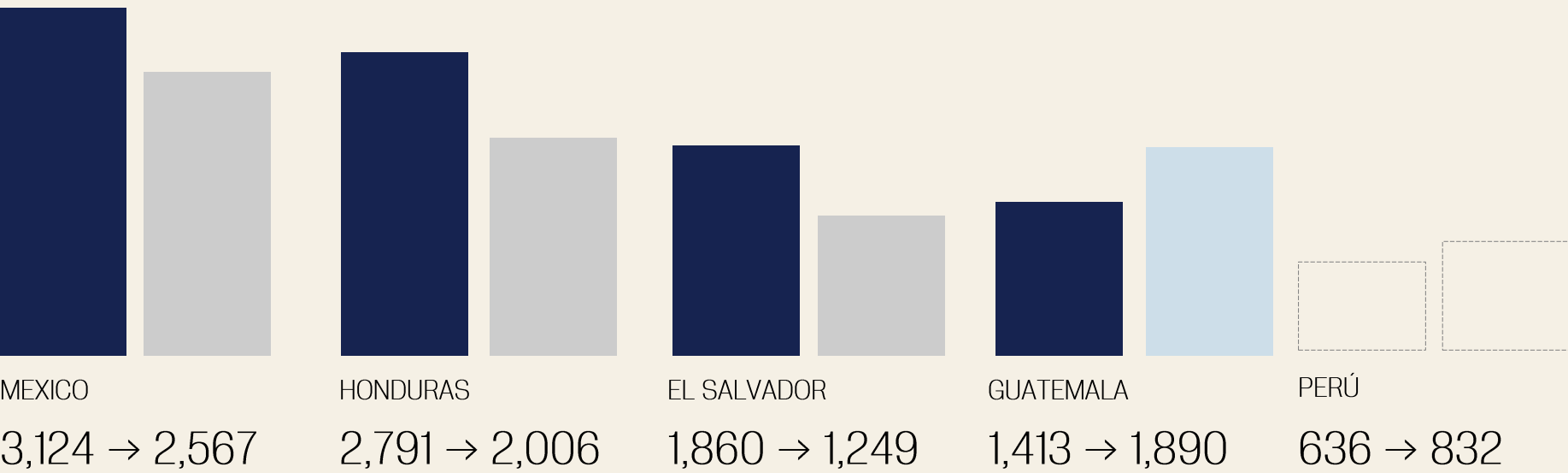
Duty for Peru and CAFTA-DR under free trade agreements, against 16.5% to 32.5% for Asia

+10 – 12.5%

Since 24 July 2026, a new Section 301 layer applies on top. Its trigger is not the trade balance. It is how well your country enforces against **forced labor**.

The tariff schedule stopped measuring where your goods come from. It started measuring whether **you can prove how they were made**.

APPAREL EXPORTS TO THE US, US\$ MILLION



Left bar 2019, right bar 2025 . Six years of duty-free access. Three of the four fell.

WHAT THE 301 LAYER ACTUALLY DID TO THE REGION, July 26

SLV /GTM - 10%	CAFTA-DR textiles exempt. Both hold their own carve-out lists.
MEX / HND - 10%	CAFTA-DR textiles and USMCA duty-free goods exempt under Note 52
TAIWAN - 10%	Where MFN already exceeds 10%, the added duty is ZERO
PERU - 12.5%	No tier listing, no textile carve-out. Same treatment as China & Brazil

THE MARKET

The tariff is not the risk.
The finding is the risk.

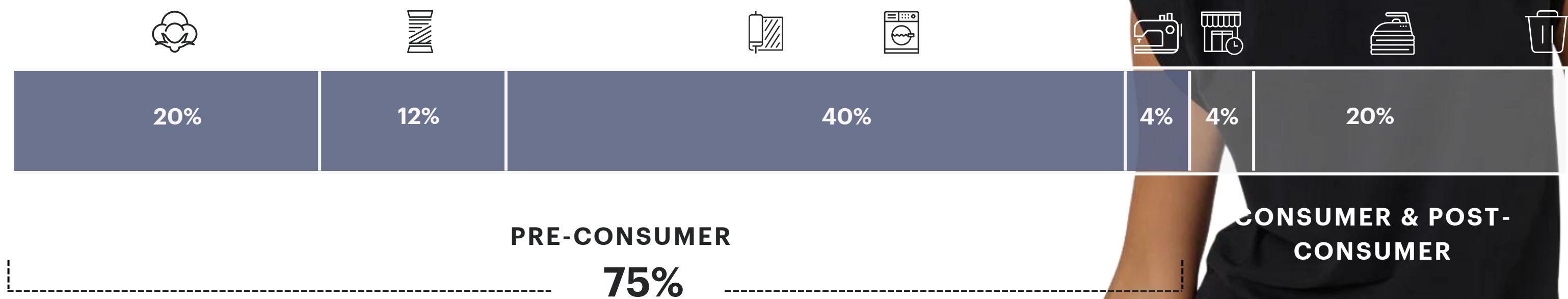
the rule book

03 the rule book

half of world apparel demand now buys under evidence based law.

WHERE THE IMPACT ACTUALLY SITS

75% of fashion's environmental impact lives in our supply chains



The pressure is not abstract. CSRD requires **Scope 3 disclosure**.
EU due diligence law demands **supply chain accountability**.

Life-cycle stage shares of apparel environmental impact. Corroborated by the Apparel Impact Institute, Taking Stock of Progress Against the Roadmap to Net Zero, 2025: textile processing is 55% of sector emissions and raw material production 22%, together 77% upstream of garment assembly.

EUROPEAN UNION

27%

26.6% of the world's buyers, and the strictest rulebook on earth for how their clothes get made.

70-76% of the EU's textile and apparel imports come from Asia.

Regulation applies directly in **every member state**.
A directive sets the goal, and each country writes its own law to meet it.

REGULATION	TYPE	STATUS	EXPECTED BY
CSRD Corporate Sustainability Reporting Directive	Directive	Approved EU law	2027+
ESRS European Sustainability Reporting Standard	Directive	Approved EU law	2027+
CSDDD Corporate Sustainability Due Diligence Directive	Directive	Approved EU law	2029
PPWR Packaging and Packaging Waste Regulation	Regulation	Approved EU law	2027 - Packaging QR 2028 - Reusable Pack 2030 - Mandatory
ESPR Ecodesign for Sustainable Products Regulation	Regulation	Approved EU law Textile-specific requirements pending	~2027
DPP Digital Product Passport	Regulation	Approved EU law Textile-specific requirements pending	~2027 - 2028
EUTLR EU Textile Labeling Regulation	Regulation	Approved EU law Revision in progress	~2027 - 2028
UCPD Unfair Commercial Practices Directive	Directive	Approved EU law Updating	~2026
ECGT Empowering Consumers for Green Transition Directive	Directive	Approved EU law Adopted	Sept 2026
EUDR European Deforestation Regulation	Regulation	Approved EU law Application delayed	Dec 2026

NORTH AMERICA

23%

22.5% of the world's buyers, and a patchwork of state laws writing the rules instead of one federal rulebook.

71-73% of U.S. apparel imports come from Asia.

Under UFLPA the **burden of proof sits with the importer.** No documented origin, no entry.

REGULATION	JURISDICTION	STATUS	EXPECTED BY
UFLPA Uyghur Forced Labor Prevention Act	US Federal	In force, active enforcement	Ongoing since 2022
SB 253 Climate Corporate Data Accountability Act	California	In effect	Scope 1&2: Nov 2026 / Scope 3: 2027
SB 261 Climate-Related Financial Risk Act	California	Enforcement paused — legal challenge	TBD, pending 9th Circuit ruling
AB 1817 PFAS in Textiles	California	In effect since Jan 2025	Threshold drops 2027 / exemption ends 2028
PFAS Apparel Ban	New York	In effect since Jan 2025	Outdoor apparel exemption ends 2028
SB 707 Responsible Textile Recovery Act – EPR	California	Approved — PRO selection under legal challenge	Producers must join PRO by Jul 2026
A4631B Fashion Act	New York - proposed	Pending, not yet passed	Uncertain
Bill S-211 Forced Labour & Child Labour in Supply Chains	Canada Federal	In effect, annual reporting	Ongoing since 2024

THE DEADLINE WALL

49.1% of world apparel demand is moving to evidence based law at the same time

Europe 26.6% plus North America 22.5% of global apparel market value. Two rulebooks, one direction.

2026	2027	2028	2029
• SB 707 · producers must join the California PRO by July • ECGT adopted · green claims policed in the EU from September • SB 253 · Scope 1 and 2 reporting from November • EUDR application from December	• CSRD and ESRS reporting begins • SB 253 · Scope 3, the supplier data year • DPP and ESPR textile requirements expected • AB 1817 PFAS threshold drops	• DPP and textile labeling revision fully expected • PFAS outdoor apparel exemptions end in CA and NY • PPWR reusable packaging obligations	• CSDDD due diligence obligations apply • Chain of custody becomes a contractual duty, not a request

The first compliance year is not the year you start collecting. **It is the year you must already have collected.**

Honest footnote: Omnibus I, in force 18 March 2026, narrowed how many companies these obligations bind. The direction of the wall has not changed. The number of companies standing in front of it has.

THE RULE BOOK

Every law in that book asks
the same question.

Where did this come from?

the gap

04 - THE GAP

04 the gap

what the industry believes, and what the industry has built.



FROM TRUST TO EVIDENCE

63%

of professionals believe traceability enhances competitive advantage. The conversation has moved from trust to data.

“Trust isn't compliance”

BEN TOMKINS

Regional Vice President Americas - Oritain

Real trust needs transparency, not adherence. Evidence, not attestation.

THE FUTURE OF FASHION TRACEABILITY ·
SJ STUDIO X ORITAIN · 558 SURVEY
RESPONDENTS

Does your company have an ongoing
traceability strategy?

44%

Yes, and we are already actively tracing
our products

20%

Yes, we have a strategy, but we are
not actively tracing

36%

No, we have no plan to implement a
traceability strategy

Belief is at 63%. Execution is at 44%.
That 19 point gap is where the next decade
of sourcing decisions will be won.

KEY DRIVERS OF TRACEABILITY

what is actually pushing companies to trace

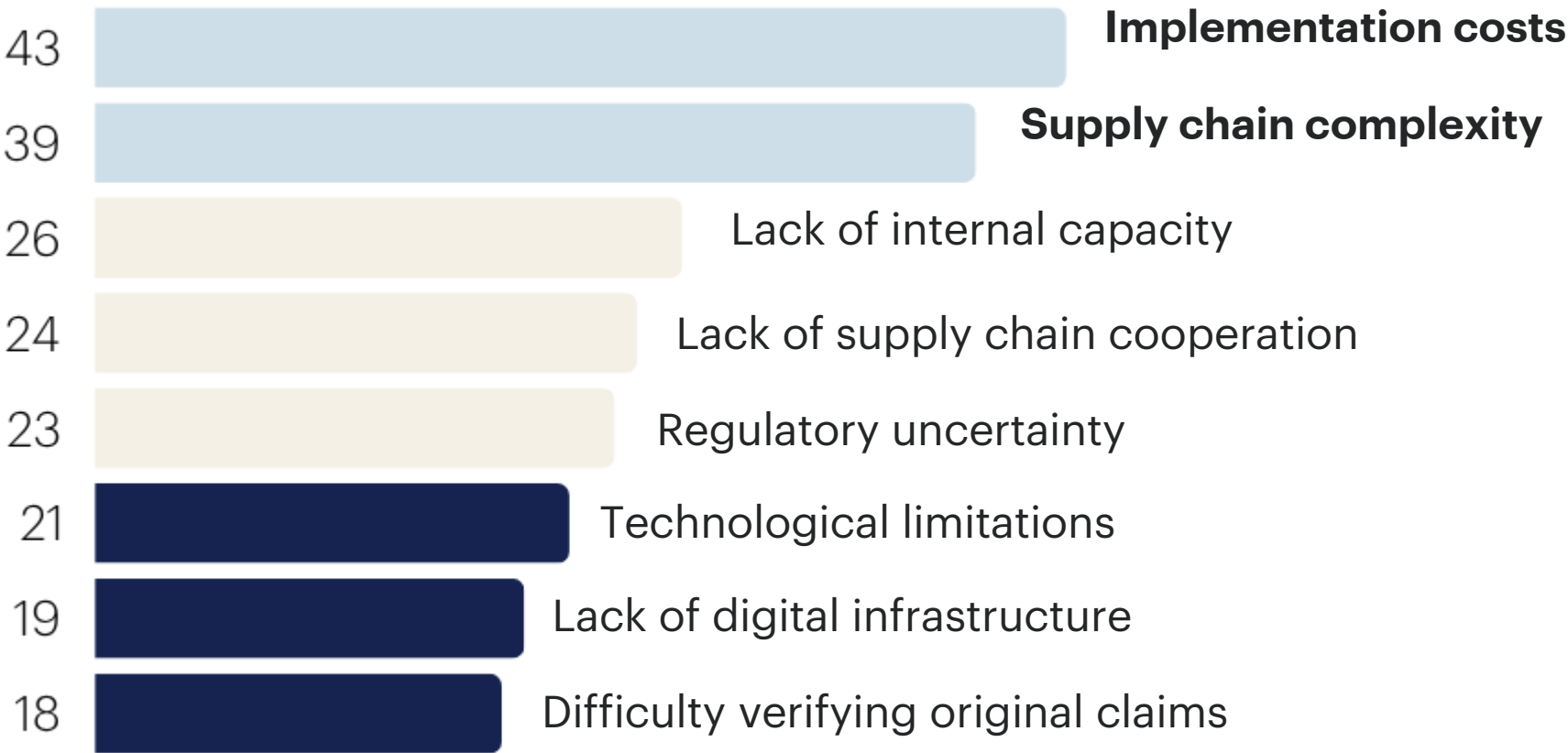


The top three drivers are commercial. Traceability is not being bought as an IT project. It is being bought as **reputation insurance.**

THE FUTURE OF FASHION TRACEABILITY ·
SJ STUDIO X ORITAIN · 558 SURVEY RESPONDENTS

KEY CHALLENGES IN TRACEABILITY

the barrier is not the technology



THE FUTURE OF FASHION TRACEABILITY ·
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READ IT AGAIN

the top two barriers are
cost and complexity.

Technology sits seventh, at 21%.

You cannot buy your way out of a
chain that crosses six countries. You
can only shorten it, or instrument it.

33%
have a dedicated
traceability team
today

36%
will build one within
two years

THE GAP

The gap is not free.
Somebody is already
paying for it.

the edge

05 - THE EDGE

05 the edge

where cost, speed, law and evidence finally meet.



WHY BUYERS CHOOSE A SOURCING BASE · USFIA SURVEY, JULY 2026

Asia wins on cost. the western hemisphere wins on exactly what the law now measures.

DESTINATION	SPEED 2 MKT	COST	VERTICAL INTEGRATION	SOCIAL COMPLIANCE	ENVIRONMENT COMPLIANCE	GEOPOLITICAL RISK	US IMPORT BARRIERS
WESTERN HEMISPHERE							
USA	4.5	1.5	1.5	3.5	4.0	3.0	-
Mexico	4.0	3.0	3.0	3.5	3.0	3.0	3.0
CAFTA - DR	4.0	3.5	3.0	3.0	3.0	3.0	3.0
Colombia	3.5	3.0	3.5	3.5	3.0	3.0	3.0
ASIA							
China	3.5	3.5	4.5	2.0	2.0	1.5	1.0
Vietnam	3.0	4.0	3.5	3.0	3.0	2.5	2.0
Bangladesh	2.5	4.5	3.0	2.5	2.0	2.5	2.5
India	2.5	4.0	4.0	3.0	2.5	2.5	2.5

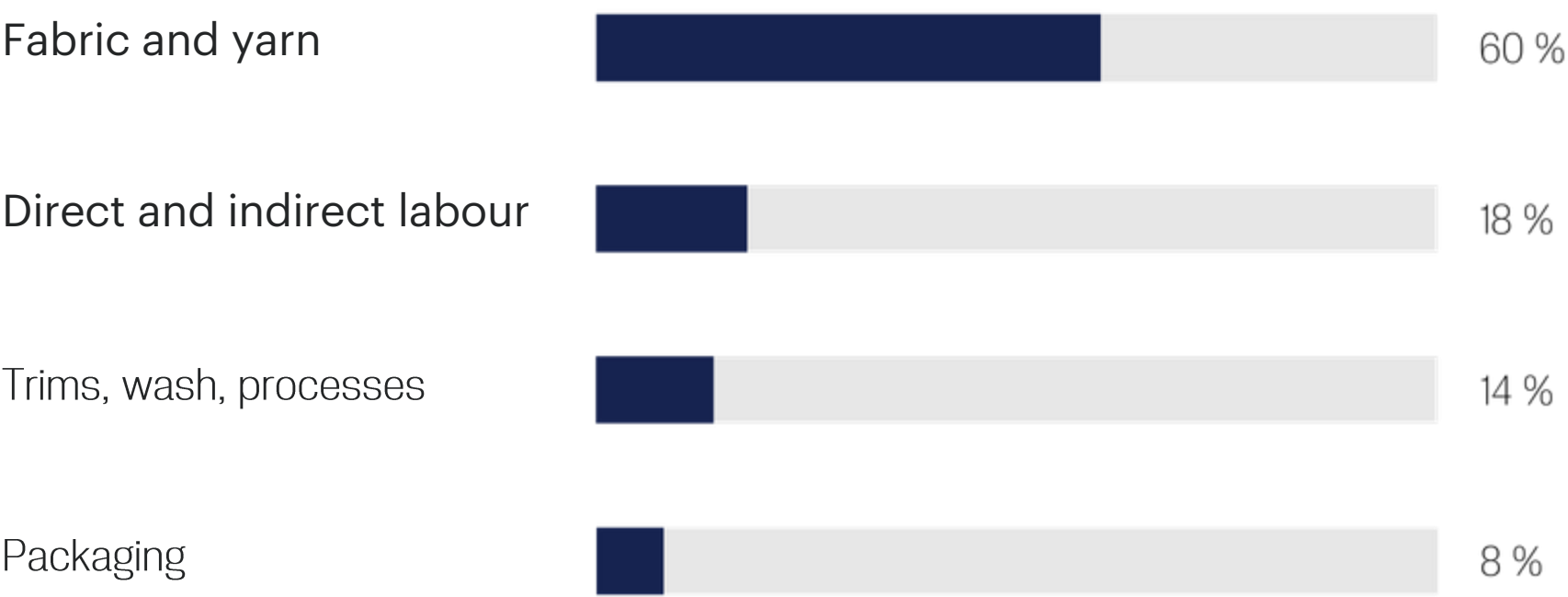
United States Fashion Industry Association benchmarking survey, July 2026, as presented in WTS/TSC market analysis. Scale 1 to 5; on risk columns a higher score means lower exposure. Peru is not scored separately; Colombia and CAFTA-DR are the closest regional proxies.

Cost and integration are Asian strengths, and they are real.

Speed and compliance risk are Western Hemisphere strengths, and until 2024 they were tie breakers, not decision makers.

From 2027, compliance risk carries a **legal price tag**. That is what changes the arithmetic, and that is what traceability monetises.

FOLLOW THE MONEY
the cost is upstream. so is the risk.



Roughly **60% of the cost sits in fibre and fabric** — the two tiers almost nobody maps. Most audit programmes stop at the sewing floor, which is where less than a fifth of the cost is created.

WHAT BUYERS HAVE BEEN ASKING SUPPLIERS TO BECOME	
1970	Manufacturing, CMT (Cut, Make and Trim)
1980	Manufacturing and sourcing
2000	Manufacturing, sourcing and product development
2005	Full Package
today	Full package plus connecting services.

And the connecting service brands are now buying **is evidence**.

THE PRICE OF DOUBT
compliance risk is no longer a score. it has an invoice.

17,651

shipments detained
under UFLPA, FY2025
to April FY2026

US \$295 M

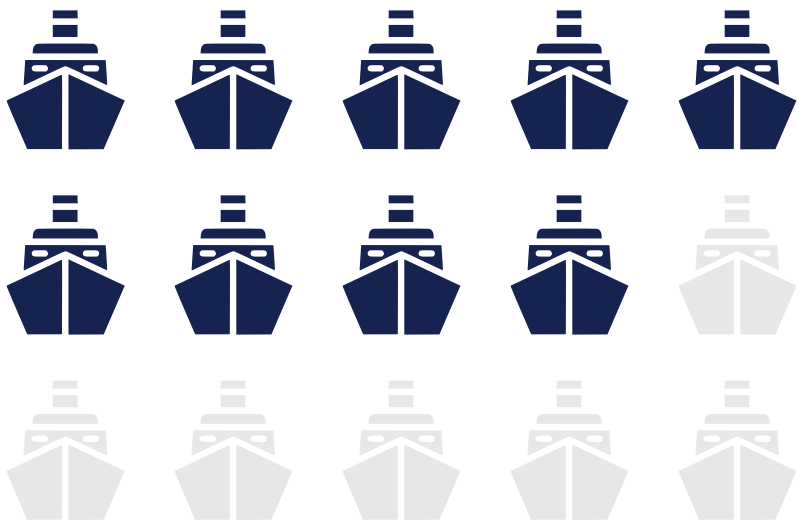
the value held inside
those detentions

377

apparel shipments
detained in the first
half of 2025 alone

3%

of net worldwide
turnover, the CSDDD
penalty cap after
Omnibus I



62%

of detained
shipments were
denied entry
outright.
2 in 3

Nobody detains a shipment because the
factory was bad. They detain it **because the
file was thin.**

WHO PAYS FOR THE DOUBT TODAY

you are already paying for traceability.
you are just paying for its absence.

- 01 The same factory audited five times a year by five brands
- 02 Retests and lab fees to re-prove what was already proven
- 03 Chargebacks and deductions when a claim cannot be documented
- 04 Air freight to rescue a shipment that lost its window
- 05 Working capital frozen in a container nobody will release
- 06 No verified origin, no premium. The fibre is the same, the price is not

Evidence does
not add a cost line.

Every item on that list is a **payment the supplier already makes for the absence of a file**. None of them appear in a traceability budget, because none of them are called traceability.

THE ASYMMETRY NOBODY SAW COMING

less regulation does not mean less demand for data

Some smaller suppliers may face fewer direct reporting obligations.
But brands still need **supply-chain data** to manage risk, meet their targets and make sourcing decisions.



Omnibus I (March 18, 2026) narrow the number of companies directly in scope and limit certain information requests to value chain partners with fewer than 1000 employees.

PERU · ONE COUNTRY, ONE CHAIN

grown here, spun there, sewn elsewhere.
peru does it in one.

~64%

Of Peru's electricity is low carbon. Hydro alone: 53%.

0.18%

Of the world's CO₂ emissions, 2024.

No GMO

Peruvian Pima cotton grown from non-GMO seeds, by law.

90,000+

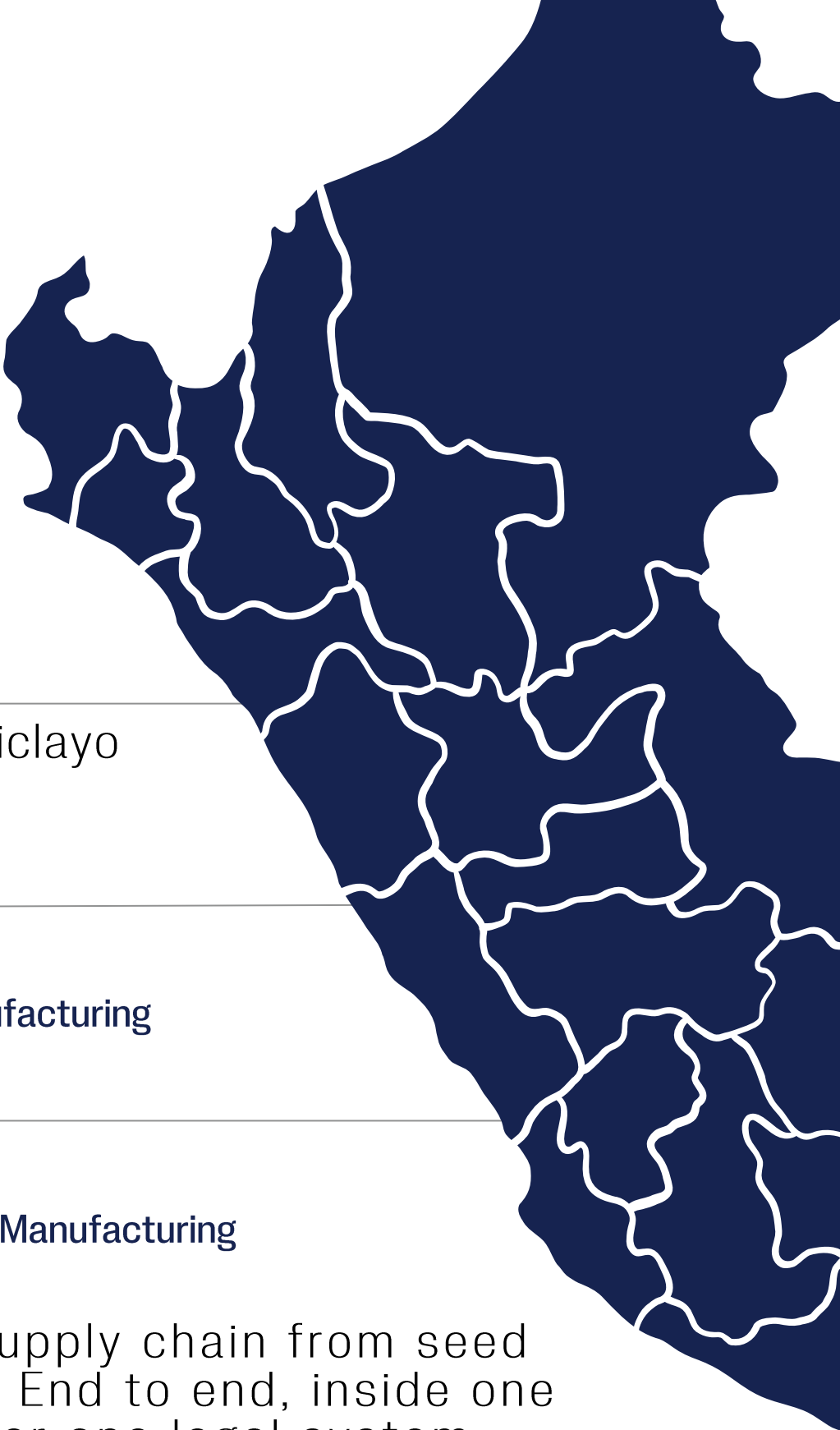
Direct formal jobs. 280,000 across the full chain.

NORTH Lambayeque, Chiclayo
Pima Cotton Field

CENTRE Lima
Spinning, Fabric, Manufacturing

SOUTH Ica, Chincha
Tangüis Cotton Field, Manufacturing

620 miles Complete supply chain from seed to garment. End to end, inside one border, under one legal system.



PERU · GROWN, MADE, SOLD

a small chain, and an honest one about its own limits

GROWN

17,000 MT

National production, 2024.
Ica 52% · Piura 27% · Lambayeque 15% · Lima 6%.

Peru grows less than 0.1% of the world's cotton.

MADE

72,000 MT

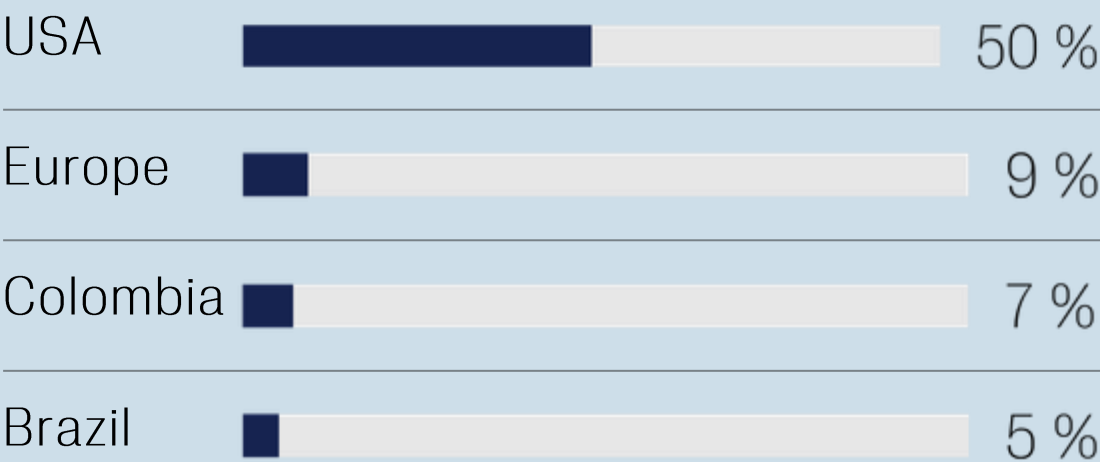
Annual fiber imports, 2024.
Over four times what Peru grows, almost entirely raw U.S. cotton.

Even the short chain imports.
The difference is that it can tell you from where.

SOLD

US\$1,730M

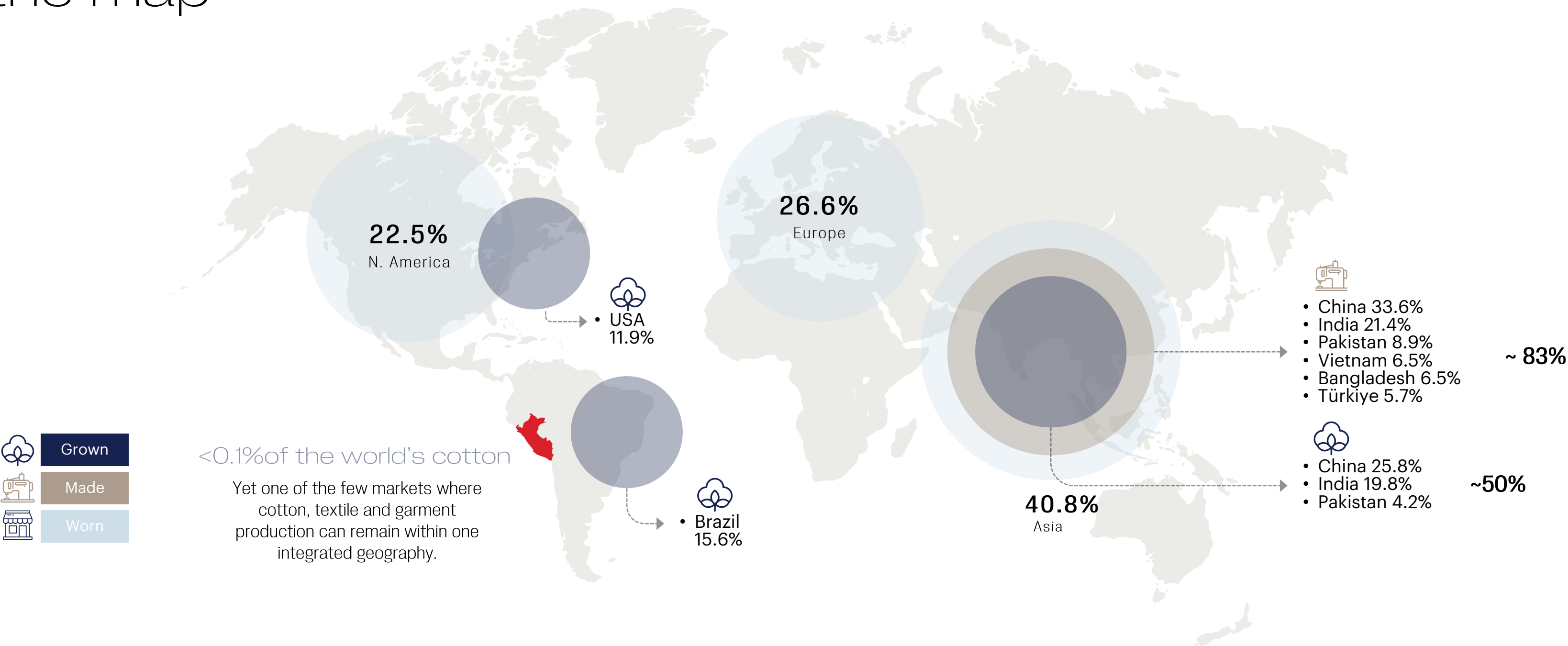
Textile and apparel exports, 2025.



Sources: U.S. Dept. of Commerce & USDA FAS (production, imports) · MIDAGRI (regional shares) · MINCETUR (exports) · USDA (world production, 2024/25).

SUPPLY CHAIN COMPLEXITY

the map



CLOSING

we did not build
this for a
regulation.

We once took a buyer out to our certified Pima fields, to move his program to local cotton. We walked the rows, answered everything, and left that day sure we had him.

We didn't. Nothing we showed him in that field could be proven, document by document, down the chain.

Transparency what we were willing to show
+ Data what we could actually prove

= Traceability
what a buyer can move a program on



W-ONE

what we built

Consumer	W-One Brands	W-One Partners	WTS
• Access with QR code / URL • Photos and description of the garment. • Supplier stories. • Geolocation of the chain • Environmental footprint • Certifications behind the garment. • Garment care instructions with a link to the brand.	Access with username and password • PO/style follow-up • PO/Style ESG impacts. • PO/Style Documents • PO/Style chain visibility • Factory profiles • Factory performance (assessment) • QR code for garments • QR scan analytics	Access with username and password • PO/Style follow-up • Fabric allocation • Factory profiles • ESG impact management • Assessment / Diploma • Improvement plan • Training academy • ESG targets • Upload documents (AI) • Impact load	Access with username and password • PO/style follow-up • Supplier management • Documents. • ESG targets • Assessment progress • ESG impacts • Brands management - documents • Mass balance (circularity purpose)







Main view

WTS-PRD-4406

International Silver Nation LLC

98% Peruvian Pima Cotton, 2% Elastane

455g

Calculated Environmental Impact

Save

Share

Your Garment's Journey

Complete tracking from your garment back to its origin

1

Distribution

NO DATA REPORTED

Logistics — Distribution

2

Confecciones Textimax S.A

T1 — Manufacturing

Lima, Perú

Score: 11% Share: 100%

3

Idetex SAC

T2 — Weaving / Dyeing

Lima, Perú

Score: 60,6% Share: 100%

Udemy Certificate (2)

Udemy Certificate

Udemy Certificate

+2 more

4

Hilanderia de Algodon Peruano SA

T3 — Spinning

Arequipa, Perú

Score: 93,3% Share: 100%

5

Araujo Kastner Maria Fernanda

T4 — Raw Material

Environmental Impact

Market comparison

Values calculated with estimated factors.

Water Consumption

14,4 L

Equivalent to 0 5-minute showers

MARKET COMPARISON

Your garment	14,4 L
Industry average	2700 L
Best in class	1200 L

99% less than average

Carbon Footprint

86,9 kg CO₂

Equivalent to 725 km by car

MARKET COMPARISON

Your garment	86,9 kg CO ₂
Industry average	8,5 kg CO ₂
Best in class	4,2 kg CO ₂

Near industry average

Contribution by stage (tier)

Percentage of impact contributed by each stage of the chain (T4 → T1).

WATER CONSUMPTION

70%

30%

CARBON FOOTPRINT

99%

WORLD TEXTILE SOURCING

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Order #3687

In Progress

Product: ALEXA BARREL PANTS Color(s): BLOSSOM Quantity: 40,000 units Delivery: December 31, 2026

Docs: 1/28

Chain: 4

Docs progress

4%

Passport

Summary

ESG Impact

Documentation

40,000

Quantity

Dec 31

Delivery

4%

Document progress

4

Suppliers

Active chain

Supply Chain Map

Actual suppliers assigned to this order, stage by stage.



Raw Material

Cotton, natural fibers



Spinning

Yarn and processing



Weaving

Weaving and dyeing



Manufacturing

Final assembly



Transport

Logistics

Compañía Textil WG S.A.C.

100%

0%

Idetex SAC

100%

60.63%

Textile Sourcing Company SAC BIC

100%

85%

4STextil SAC

100%

77.89%



1,135 tCO₂e

Leg CO₂

Perú → US

Mass Balance

Material flow from raw material to the finished garment

Efficiency: 22.5%

Total waste: 39.3t



13.1

hectares
50.7t cotton



-35.7t



19.3t

T4 - Raw Material

78%



-0.9t



15.0t

T3 - Spinning

94%



-0.7t



13.4t

T2 - Weaving

95%



-2.0t



11.4t

T1 - Manufacturing

85%



40K

garments
11.4t total

Order #3687

In Progress

Product: ALEXA BARREL PANTS Color(s): BLOSSOM Quantity: 40,000 units Delivery: December 31, 2026

Docs: 1/28

Chain: 4

Docs progress

4%

Passport

Document traceability

Documents required by the client, by tier and chain.

Compliance

1/28 approved · 5 uploaded

4%

Mandatory Optional WTS Required by WTS Brand Required by client

T4 · Fiber

2



Certificado de cosecha WTS

Compañía Textil WG S.A.C.

Pending



Certificado de origen WTS

Compañía Textil WG S.A.C.

Pending

T3 · Yarn

1 1 2



Especificaciones de hilado WTS

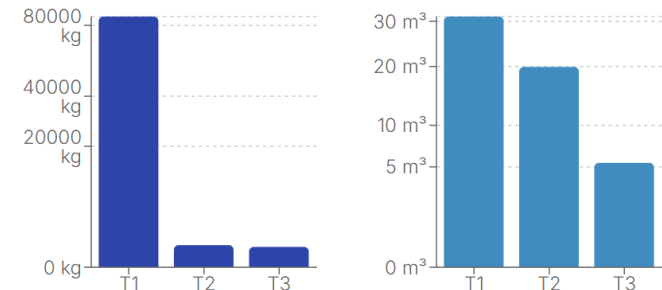
Idetex SAC

Uploaded 9/4/2026 · 39a75a2473ea4e6c8eefa7bad9b0c730-test-document_1.pdf

Approved

View

Impact by tier



Tier	CO ₂ e	Water Consumption
T1	85,931.4 kg	31.2 m³
T2	667.6 kg	19.9 m³
T3	565.3 kg	5.4 m³



My Orders (373)

View all

- All (373)
- New (5)
- In production (0)
- Delayed (152)
- Completed (216)

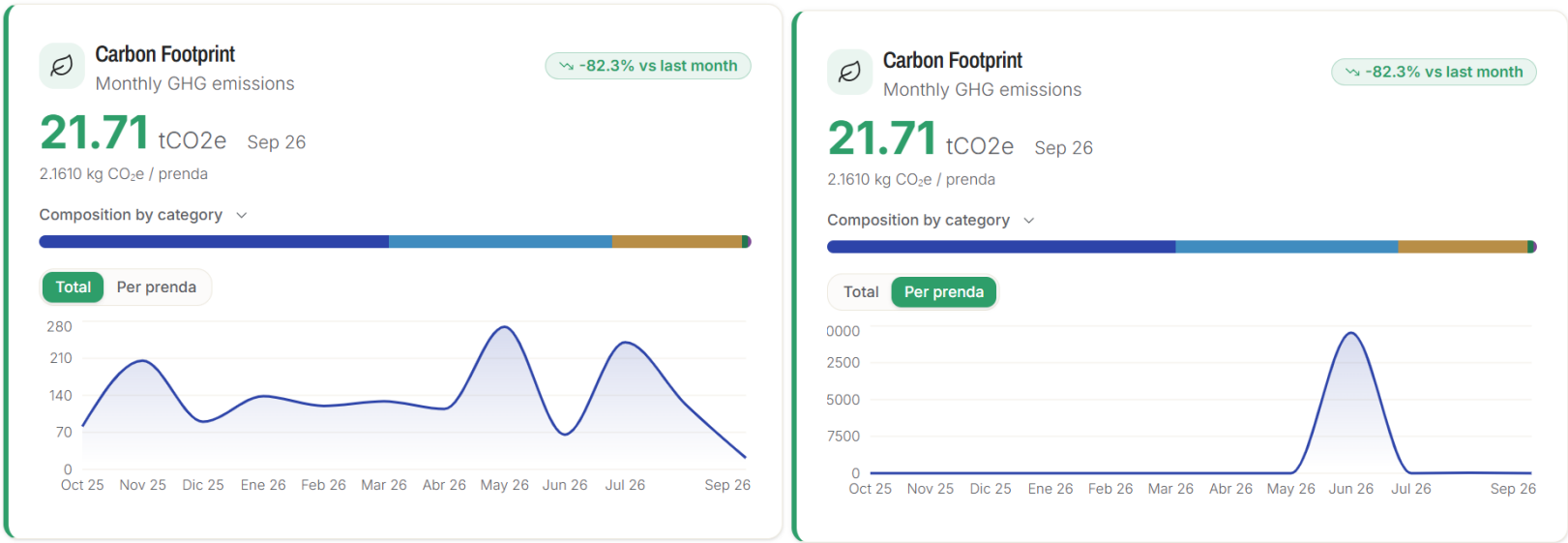
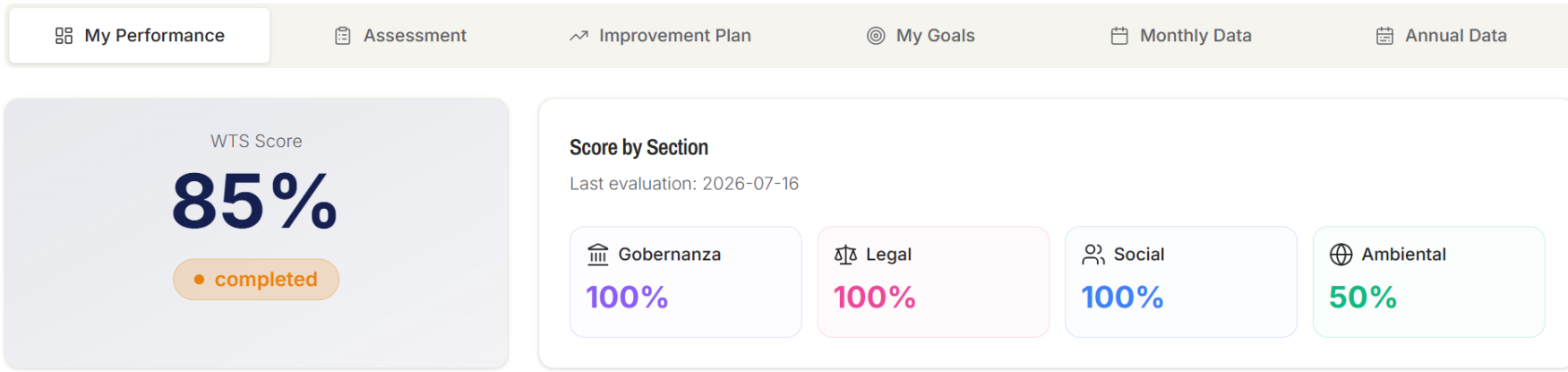
AS438575R	TONIC SS CREW • Allsaints US Limited	100% docs	Completed	432d overdue
AS431209R	FIGURE SS CREW • Allsaints US Limited	100% docs	Completed	432d overdue
PO1024588	IMPERIAL LOGO LS TEE - STRETCH JERSEY ~70% COTTON - 30% KIPA • Paramount Apparel Int. Inc	100% docs	Completed	421d overdue
PO1024757.1	IMPERIAL LOGO LS TEE - STRETCH JERSEY / 50% COTTON - 50% • Paramount Apparel Int. Inc	100% docs	Completed	421d overdue
40587067	NEW TAKE CREW NECK TEE • Nordstrom product group	100% docs	Completed	414d overdue

< 1 / 75 >

Sustainability Center

Manage your performance, assessments, goals and impact data

Cycle H2-2026



EVERY FIGURE IN THIS DECK

Sources & References

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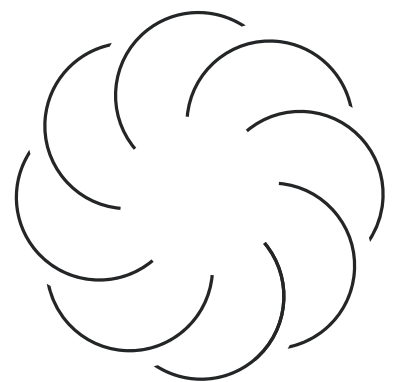
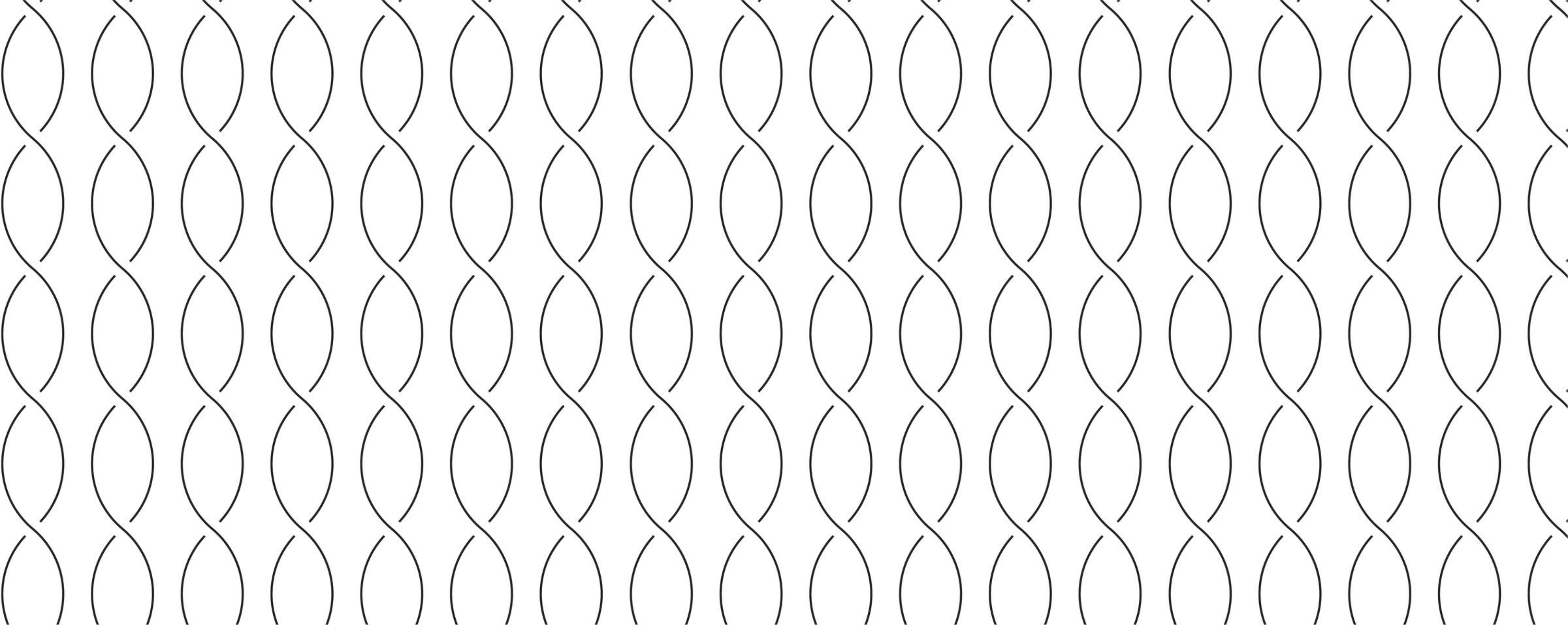
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