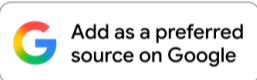


OPINION

# Can ethical supply chains survive tariffs

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Recent geopolitical developments have underscored the fragility of supply chains, reminding businesses in constantly evolving sectors like consumer goods and fashion that the strength of supplier relationships is one of the few persistent sources of resilience. Maintaining such relationships through responsible purchasing is not only ethical but strategically necessary.

The fashion industry is one of many that is feeling the weight of trade disruptions that come at a time when it is struggling to make progress toward previously stated climate and sustainability goals. According to a 2025 benchmarking survey by the US Fashion Industry Association of 25 leading apparel brands and retailers identified the current administration's protectionist stance and volatile trade relationships as a top challenge, and more than half flagged policy uncertainty, especially retaliatory tariffs, as their primary concern.

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-13%	-10%
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Rather than responding with short-term cost-cutting, though, major consumer-goods companies are making strategic investments to build resilience. For example, retailers like Walmart and Target have freed up inventory to absorb tariff shocks ahead of the holiday season. Apple has chartered cargo flights to transport 1.5 million iPhones from China to the US, a move made possible by increasing production with a key supplier in Vietnam.

These are not just logistical moves; they are evidence of why trust-responsive supply-chain relationships matter. Responsible purchasing practices are the glue that holds supply chains together in uncertain times. Gartner reports that nearly half of large enterprises have renegotiated supplier contracts or shifted sourcing strategies to manage risks associated with the tariffs. Such trends reflect a growing consensus that resilient, transparent, and values-aligned supply chains are key to avoiding major disruptions and maintaining competitiveness.

Unfortunately, the fashion sector is a laggard in this regard, scoring 66 out of 100 in Cascale's Better Buying 2025 Garment Industry Scorecard, with year-on-year declines in key areas of responsible purchasing, including cost negotiation, payment terms, and product development.

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The trend is also concerning for its climate implications. The fashion industry, with its complex global supply chains, is particularly vulnerable to such ripple effects. The US tariffs that went into effect in January directly affect sourcing hubs with an outsized influence on the industry's carbon footprint. Cascale finds that just 1,800 factories account for over 80% of measured carbon emissions from the apparel, textile, and footwear industries. Of these, six countries -- China, Bangladesh, Vietnam, India, Turkey, and Pakistan -- have been directly affected by the new tariffs.

Shifting sourcing away from these hubs might avoid short-term tariff costs. But it could also disrupt ongoing efforts to reduce emissions from these major sources.

We saw this in 2018, when tariffs against China drove a production shift to Vietnam. Since it typically takes an average of 14 months for brands to add new suppliers, such rapid shifts cause a ripple effect: labour violations, longer lead times, and quality issues. Without coordinated planning, they risk undermining climate goals and working conditions alike.

Though fashion is a \$3 trillion (97.8 trillion baht) industry, it is expected to have only a minimal formal presence at this year's United Nations Climate Change Conference (COP30). COP30 will focus more on adaptation finance, carbon pricing, and nature-based strategies than redrawing trade or sourcing lines.

In short, COP30 will not offer any direct relief on tariffs, but it could shape the long-term rules of the game, linking sustainability targets to sourcing practices, and competitiveness factors through policy levels that lie beyond the fashion industry's immediate control.

As trade-related costs persist, industry leaders must shift their mindsets. Their businesses' resilience will not come from diplomacy or a presidential handshake, but from trust-based relationships, fair purchasing practices, and innovations to drive sustainability.

Companies that default to price-driven strategies risk eroding their ability to deliver quality, speed, and innovation to today's conscientious consumer.

At a time when tariffs and climate-related shifts can alter sourcing strategies overnight, resilient partnerships are more than operational tools. They are strategic differentiators, signalling accountability, stability, and ethical leadership to a growing list of stakeholders who are thinking about the long term. ©2025 Project Syndicate

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