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A

REPORT

2025





# WELCOME TO AI'S PRODUCT ERA

BY BEN HANSON  
EDITOR-IN-CHIEF, THE INTERLINE

WHAT IT MEANS FOR FASHION TO LOOK FORWARDS AT TWO VERY DIFFERENT HORIZONS - ONE WE CAN SEE FAIRLY CLEARLY, AND ONE WE DEFINITELY CAN'T.

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Predicting the trajectory of AI itself is pointless. Nobody outside the walls of the biggest and best-funded artificial intelligence labs really knows what's coming down the pipe in terms of capabilities.

As evidence: we've continued to get periodic "future shock" moments despite analysts' best guesses. And we've been seeing them faster, with fewer gaps in between, when, by rights, we should be getting better at forecasting them over time.

Before late 2022, who saw the original launch of ChatGPT coming? In early 2023, who expected it to hit 100 million users in two months of general availability? This spring, who thought the world would go temporarily mad for Studio Ghibli-style images, as the biggest manifestation of GPT 4o's native image generation model? Ahead of last month, May 2025, who expected Google's Veo 3 video generation model, which combined audio and video into single prompts, to potentially blow the doors off advertising?

You only have to glance over the OpenAI blog post that accompanied the initial ChatGPT research preview to see just how quickly technology predictions can end up looking rather humble. And you only need to look back at the articles written at the peak of the Metaverse furore for a reminder of the opposite: how quickly the air can get sucked out of a room it sure looked like everyone was inevitably rushing into.

So am I going to start this year's AI Report with a prediction of what the fastest-developing technology segment will look like, capability-wise, this time in 2026? No.

There is, though, a line of more productive prediction I'm much happier putting my name next to. I'm confident that the commercial and cultural uptake of AI is going to generate a whole new class of products, services, devices, and experiences, irrespective of how many more future shocks 2025/26 brings us.

I'm also comfortable saying that those new introductions will change how we think about not just fashion software and hardware, but the nature of work, the scope of automation, the value of creativity and potentially much more. Again: these shifts are not going to come about because of vague possibilities or vibes, but thanks to concrete applications.

The reason I'm happy standing by this big assessment is that it's not an especially unusual one, and I'm by no means alone in making it. In fact, the evidence for it is simply everywhere in the spring of 2025 in a way it simply wasn't this time last year.



\*Image created using AI

In my introduction to [The AI Report 2024](#), I said that the market expectation for brands, suppliers, technology vendors, and service providers was to “insert AI into whatever they do”. Now that work is extremely well underway.

According to the 2025 edition of [Stanford University's industry-defining AI Index](#) (all 400+ pages of which are well worth reading) the last year has seen a more than 20% increase in the number of organisations that self-report using AI in at least one area of their business - to where that figure is now knocking on the door of 80%.

The same report also gets more specific: the share of companies, across industries, using generative AI (not just AI in general) in one or more business functions doubled in the same period, to where it now stands at more than 70%. So it's no longer accurate to say that 'traditional AI,' i.e. the kind of analytics, segmentation, classification and so on that would have previously been labelled as machine learning, is doing most of the heavy lifting.

In terms of pure scale and ubiquity, we're now a long way from the pilot phase of AI - and the attitudes of business leaders have evolved to match.

In [a now-infamous memo](#), which circulated in April of this year, Shopify CEO Tobi Lutke instructed the eCommerce juggernaut's internal teams to “demonstrate why they cannot get what they want done using AI” before they were permitted to request more staff or additional resources.

In the same memo, Lutke called AI usage a “baseline expectation” for not just the incoming wave of professionals, but throughout the company's existing workforce.

And even though it feels like a high bar to set, less than three years after generative AI landed as a class of professional and consumer tools, that expectation isn't wildly out of step with what's happening in the world. This May, Sundar Pichai, CEO of Alphabet / Google announced that, across enterprise and personal applications, the number of tokens - raw output - generated by the company's Gemini model family had **increased 50x year-over-year from 2024 to 2025.**

Everyone is, in other words, already using AI. The world of work is simply mirroring the world at large.



\*Image created using AI.

Make no bones about it: there has been no technology adoption curve quite like this outside of the internet. And even though one company - OpenAI - is currently swallowing up most of the general-purpose AI business, with a reported 80% market share amongst corporates, we are not yet near the point of consolidation in the general AI industry, let alone the individual verticals (like fashion) where there is still fierce competition in domain-specific solutions across the extended product lifecycle.

We are, instead, at a point that Microsoft CTO Kevin Scott last month called "the middle innings" of AI - a time where AI is less constrained by its availability and adoption than it is by the maturity of the market for developing and deploying solutions that will define and delimit its real capabilities.

Or, to put it in more grounded terms, we're leaving AI's moment of boundless possibility, and entering its product era. And that means the time is also upon fashion, as well as other industries, to begin framing AI in product terms - whether it's coming attached to pre-existing services, or whether it arrives as a fully-fledged novel application.

Judged under the kind of rubric fashion uses to assess software products, AI is at an early but incredibly exciting stage. Today's mainstay solutions have the potential to transform themselves through the intelligent, sensitive addition of AI. And startups can become essential providers in very short order. (See the software development and engineering communities flocking to tools like Cursor and Claude for a preview of what's likely to happen in fashion.)

But for all that possibility space still to explore, "early" is still the operative word - at least from a cross-industry perspective. Although, as you'll find as you read through this report, fashion may just be ahead of the curve.

Looking at things with a sector-agnostic lens, though, a global C-suite survey conducted by IBM in May 2025 revealed some harsh statistics. Just a quarter of AI initiatives have delivered a return on investment, and half of all the executives surveyed believe that the rush to invest in AI is leaving them with yet more islands of disconnected technology and siloed data.



\*Image created using AI.

As readers of The Interline well know, more pockets of information should definitely not be the fashion industry's goal with AI, or with any other new technology initiative.

From the same cross-industry perspective, where value has been obtained from AI initiatives it's tended to come in sectors like marketing, sales, and customer services rather than in core enterprise orchestration. For a technology intended to have sweeping, horizontal value across a broad suite of different domains, the relatively meagre gains (the Stanford Index pegs it at less than 5% uplift in revenue in those categories) seen in a comparatively narrow space should prompt some pause.

And this is especially true when we consider the cultural impact that broad-brush AI adoption is seemingly having from the same industry-agnostic point of view. According to a survey conducted by Writer - itself a major AI company, with a vested interest in the industry continuing in a positive direction - more than 70% of executives have observed adoption challenges, and a full 40% of executives believe that the rollout of generative AI is "tearing their company apart".

Strong words, but ones befitting the scope and the scale of the transformation at hand. While the trajectory of AI adoption is clear across the board, there's also a significant amount of friction standing between today and the eventual outcome.

Unusually, though, fashion may just be ahead of the curve when it comes to both reconciling the cultural conversation around AI and beginning to apply it in discrete areas where it's adding observable value that beats the cross-industry average.

And that idea - that fashion and beauty could be on the cutting edge, and could end up setting the pace for other sectors - is one you'll see throughout this report. As you read through the stories contained in the first half of the report, you'll see inside perspectives on topics like what it means to have been an early-mover on machine learning, and how our industries are uniquely positioned to capitalise on the creative and commercial possibilities of AI - as well as analysis of how the wider world's experiences with AI are influencing the way things are likely to develop in fashion.

Beyond those stories, you'll then find detailed profiles of some key technology vendors who have developed either AI-first solutions specific to fashion, or who have intelligently integrated AI capabilities into existing industry-focused platforms - along with exclusive interviews with the senior executives who are thinking multiple steps ahead about what fashion's AI product era is going to look like.

After those unique profiles, you'll find our team's analysis of the market for AI solutions across fashion (with some initial exploration of the beauty sector, too) building on the benchmark we set in 2024, and making some more concrete, data-supported predictions.

Finally, before handing over to this report's headline sponsor MMGNET - who also supported our first AI Report in 2024 - I want to leave you with the understanding that, on balance, and with due consideration for the ongoing legal and creative disputes at its core, I'm optimistic about where AI goes from here.

The bleeding edge of technology is always difficult to visualise, but if you're interested in seeing what the practical, pragmatic, product-centric outlook for AI in fashion is, there are plenty of people over the next 130+ pages (and beyond) who are more than happy for you to come and take a look.



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The Interline is proud to continue its partnership with **MMGNET Group**, whose global reach and portfolio of live fashion events has helped to extend the conversations we aim to catalyse in our downloadable reports. For more on the role that MMGNET is playing in bringing different fashion stakeholders together to debate vital topics such as AI adoption, turn to the company foreword to this report.



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# AI ACROSS THE FASHION ECOSYSTEM

BY THE MMGNET GROUP

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Whenever people get together to talk about the business of fashion, artificial intelligence is part of the conversation.

From creative designers wary of generative AI but excited by the opportunity to automate administrative work, to supply chain professionals surrounded by spreadsheets and ready to find new ways to reliably identify risk, everyone across the extended fashion ecosystem is thinking about how AI might change the way they work, and comparing their experiences and expectations with others.

We know this because MMGNET and The Interline surveyed a global panel of fashion professionals as the industry moved into 2025, and found that nearly 83% of them expected AI to deliver value in the coming year - and that close to 80% already had AI projects or pilots under development, deployed, or planned for the next twelve months.

The speed with which the discussion, the debate, and the learning journey around AI have all evolved reflects that importance and that weight of expectation. Whether they're emerging entrepreneurs with market

niche in mind, or senior executives steering major brands or suppliers through historic upheaval, real fashion insiders' concerns are not about whether AI is coming, but about how to understand its capabilities, steer its development, build competitive insights, and engage with its potential on their terms.

These considerations are now the catalysts for some of the industry's most vital discussions. How will AI change consumer culture? Will it be the most useful in generative photography, creative design, eCommerce content creation, patternmaking, sourcing and supply chain... or is it set to impact every process along the product journey equally?

At MMGNET, we know the best way to answer those questions (and many others) is to bring professionals from all walks of fashion together at marquee industry events - not just to continue connecting buyers and suppliers to forge new commercial relationships, but to open the doors that will lead to a clear picture of the cultural, technical, commercial, and creative impact that AI will have on fashion's near and longer-term future.

Throughout the second half of 2025, our always-on industry insights and business resources - accessed via [MMGNETgroup.com](https://www.MMGNETgroup.com) - will continue to reflect, inspire, and analyse the AI conversation. And on-stage and throughout the exhibitor halls of our live events, starting in Las Vegas in August, brands, designers, executives, material suppliers, technology suppliers, manufacturers, industry bodies and more will continue to learn about, engage with, and talk through what could become the industry's deepest digital transformation to date.

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To find out more, [discover our events](#), download [key industry insights](#), and seize the opportunity to discover how AI is both empowering smaller businesses and enabling the biggest ones to transform.

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# "HELP, NOT HYPE" - LESSONS FROM A FIRST-MOVER IN AI

HOW STITCH FIX SENSITIVELY  
STRESS-TESTED AI AND FOUND  
THE RIGHT BALANCE OF PEOPLE  
AND PRECISION.



**INTERVIEWEE:**  
**TONY BACOS, CHIEF PRODUCT & TECHNOLOGY OFFICER, STITCH FIX**

Tony is an experienced product and engineering executive and entrepreneur. The former CPTO of Amazon Fashion, overseeing tech, AI, product, and UX, Bacos now drives product innovation, engineering excellence and strategies to optimize the Stitch Fix client experience and grow the business.

**FOR FOURTEEN YEARS, PERSONAL STYLING SERVICE STITCH FIX HAS HAD MACHINE LEARNING AT THE HEART OF A MISSION THAT 'S ARGUABLY MORE RELEVANT TODAY THAN EVER: PAIRING PEOPLE WITH PRODUCTS AND BRANDS THEY ACTUALLY LOVE. WITH THE WIDER FASHION INDUSTRY NOW RUSHING TO USE AI TO HELP BRIDGE A GROWING GULF BETWEEN DEMAND SIGNALS AND SUPPLY, STITCH FIX'S TECH-NATIVE JOURNEY HAS A LOT TO TEACH - AND CPO / CTO TONY BACOS HAS BEEN THINKING DEEPLY ABOUT WHAT IT MEANS TO BUILD A BUSINESS ON TOP OF ALGORITHMS THAT GIVE PEOPLE SUPERPOWERS, RATHER THAN ACTING AS A CRUTCH.**

***The Interline: Stitch Fix is one of a small cohort of fashion businesses that were built on a foundation of data science and algorithms. This gives you a unique perspective on what's happening across industry today, because Stitch Fix was extremely early to a data-centric approach to fashion that now seems pretty prescient - and is now something the wider industry is actively pursuing. What has the company learned from pioneering a business model that relies on cutting edge technology? And what have you learned from proving out that model over close to fifteen years?***

Tony Bacos: To take a step back, Stitch Fix was founded 14 years ago to solve a common yet deeply personal problem: how do I find clothes that help me look and feel my best?

What we've learned since disrupting the retail space over a decade ago is that the consumer pain point we were solving for when we started is at least as relevant today as it was then...and arguably even more so. In fact, our research shows that nearly 90% of consumers experience stress or self-consciousness when trying to find clothes that fit. IBM also released research that shows less than 10% of people are satisfied with in-store shopping and only 14% are satisfied with online shopping.

People want and deserve a better way to shop. That's what we offer. We make it possible for people to find the perfect styles - and fit - without spending hours browsing stores or sifting through seemingly endless choices online.

We can do this because of the strength of our model. We help people discover the styles they will love by pairing expert human Stylists with best-in-class AI and recommendation algorithms, and by leveraging our assortment of exclusive, well-known and emerging brands.

This year, we have begun to reimagine our client experience and create a more modern and dynamic Stitch Fix. The improvements we've made are resonating with clients and we're seeing that reflected in the momentum in our business and great feedback from clients.

Since the beginning, we've known technology alone isn't enough to deliver an incredible, personal experience. One of the main things we've learned over the past 14 years is that the magic happens when tech enhances (not replaces) the human experience. Our model works because it honors both precision and empathy. Trust is earned not only through accuracy, but through the feeling that someone gets you. We are constantly learning and are excited to see how we can continue to evolve to serve our clients.



Stitch Fix

**To consumers, Stitch Fix is a personalised styling service with a human touch; you don't position it as an AI company. How do you decide when and how to talk about AI? Do you see it - and technology in general - belonging behind the scenes, and quietly powering incredible customer experiences, or is public awareness and adoption of AI changing the conversation?**

When communicating to our clients about how we are able to deliver such a personalized retail experience, we focus on some of the biggest shopping challenges today - from the long lines, lack of inventory, dirty and disheveled dressing rooms to the seemingly endless scroll online - and how we address them.

From the beginning, our priority has been creating an experience that is deeply personal, and that starts with the people who serve our clients - our Stylists. We believe that AI is a key lever to improve our client and Stylist experience. We have never leveraged AI for AI's sake...for us, AI is about help, not hype.

That said, we also believe we have the strongest recommendation algorithms in the industry. Thanks to our continuous feedback loop and billions of data points on style and fit, we're able to offer personalization at scale, serving millions of clients with a depth of insight that is tailored to each individual. This combination of human understanding and technological precision is what makes our model unique.

Ultimately, we see AI not as a replacement for the human element, but as a way to enhance it. It allows us to give Stylists superpowers by arming them with the tools that help them give clients a more personalized experience. "Quietly powering" is a good way to put it. We're making smart use of AI as one of many important enablers for the great work that our Stylists do.

In this new era of AI, the conversation is evolving. As AI becomes more visible and widely adopted, we think it's important for companies to be intentional and transparent about how and why they use it. Customers want to know when they're engaging with a human versus interacting with an AI-powered experience.



***In the last couple of years, Stitch Fix has been undergoing a transformation that's designed to reimagine both frontend experience and backend operations. Before we get into the technical elements of how that philosophy shows up in the service and the systems behind it, it's important to call out the emphasis you're placing on people as the heart of this transformation - which isn't something that can be said for every AI-adjacent transformation and automation strategy. Why was it so important to keep human beings in focus as you're changing and futureproofing a very technology-centric business? And how is that philosophy showing up in things like stylist profiles?***

AI in combination with the expertise of our Stylists is what enables us to deliver a truly personalized experience that meets every client's unique style needs. Stylists have been central to the Stitch Fix experience since the beginning. Our community of Stylists is what sets us apart - their expertise and empathy is not something that can be artificially replicated. They are trained to partner with clients on their style journey - to get to know their style and evolving needs. So we can help them look and feel their best as they evolve.

As part of our broader effort to enhance our client experience, we are putting a greater spotlight on our Stylists and their work. Last year, we introduced a new feature called Stylist Profiles that enables clients to get to know their Stylist better. Accessible via the digital Style Card clients receive with each

Fix, Stylist Profiles are customized by Stylists themselves and feature background information (think first name photo and areas of expertise), fashion tastes and preferences and styling badges and client testimonials. We're excited about how Stylist Profiles will inspire richer dialogue between our clients and Stylists and enable us to deliver an even better client experience.

The response from clients has been really positive, and this is just the beginning. We are exploring additional ways for clients and Stylists to engage in more "real-time" connections. We recently shared that the percentage of clients requesting the same Stylist for their next Fix hit the highest level in nearly five years - a testament to the trust our clients place in our Stylists and one of the reasons why our strategy is resonating.

***Let's talk a little bit about how AI and automation support those human stylists. There's a lot of talk in fashion at the moment about augmenting people's capabilities, and about using AI to free them up to focus on higher-order tasks. What does that look like within Stitch Fix? Are you using AI, for example, to surface insights for each consumer so that stylists are able to start their creative work with the right foundation, instead of needing to hunt through systems to find a customer's previous fixes and feedback?***



Stitch Fix

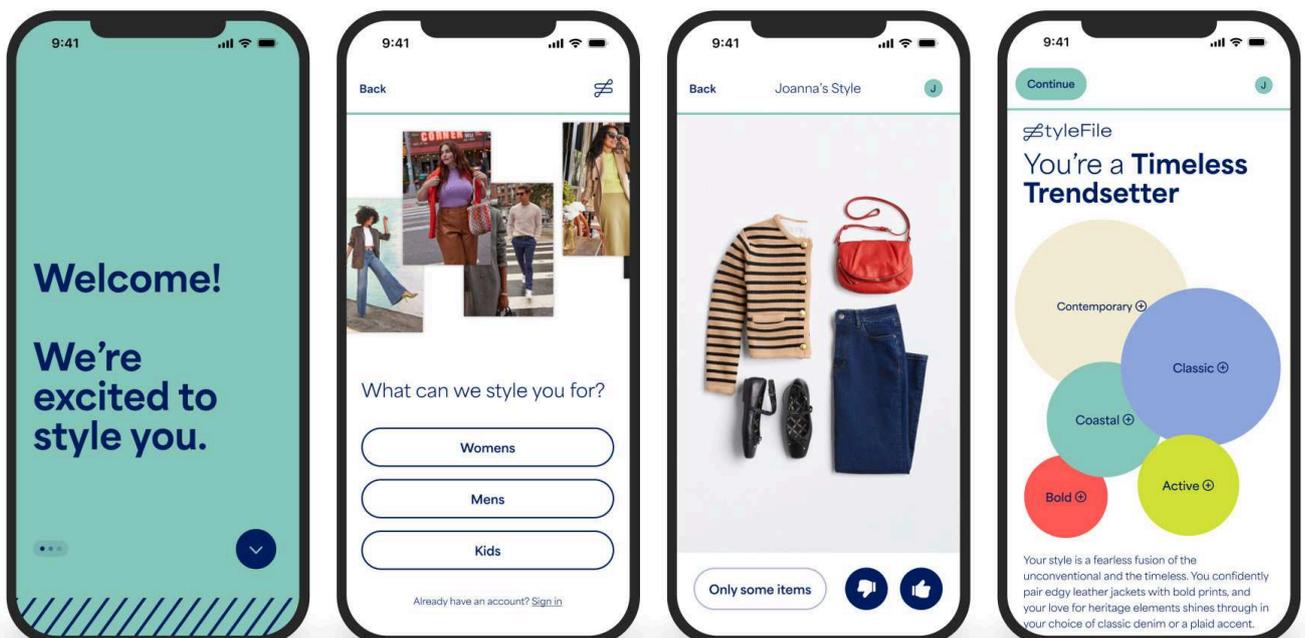
We leverage generative AI to help amplify our Stylists' talents and unleash their creativity, especially when it comes to finding efficiencies for labor-intensive or repetitive tasks. One example of this is the notes Stylists write to clients that accompany each Fix. Each note includes personalized details about the items included in the Fix and some thoughts on how to style them. This is also where Stylists can answer specific questions sent in their Fix request.

We use OpenAI's latest models to generate suggested content for the Stylist notes based on the items chosen for their clients as well as the client's history with Stitch Fix. Think of it as the first draft. AI has a deep memory and leveraging it for note drafting serves Stylists with key details - such as writing the names of the products and recalling past purchases - so that the Stylist can edit and add additional context. It enables us to take the laborious part of the note writing so our Stylists can focus on what they do best: understanding and fulfilling nuanced style requests and building meaningful client relationships.

Another example is our recommendation algorithm (CTSM, or "Client Time Series Model"), which is powered by natural language processing and deep learning. Our in-house recommendation algorithms use client feedback to identify items that match each client's fit and style preferences. We can process billions of words from the written feedback shared by clients to efficiently and effectively provide curated style recommendations for our clients. This allows our Stylists to focus on curating personalized selections for clients, rather than manually sorting through thousands of inventory pieces.

**Another area that decision-makers in fashion talk about obtaining real value from AI is in shortening the distance between obtaining information and being able to act on it. As part of your transformation initiative, you've had the goal to take consumer - stylist relationships, which historically involved back and forth communication with an inbuilt delay that made them feel perhaps more like penpal letters than chats, and to bring them closer to real-time. How did you approach redesigning that onboarding and interaction experience? And what role has AI played in it?**

Our transformation is grounded in fully realizing the potential of the model that we introduced 14 years ago. It's all about delivering on our mission - to help people discover the styles they will love that fit perfectly so they always look and feel their best.



Stitch Fix

To do this, we took a critical look at our client experience and began to reimagine how we could best serve our clients today. We have four areas of focus: First, creating a more dynamic way for our clients to engage with us, from the initial sign up to our regular connection points. Second, making the Stylist more visible and creating opportunities to deepen relationships with clients. Third, building more flexibility and engagement into the experience so clients have more ways to shop with us. And fourth, offering a stronger assortment with more fresh and new styles.

The improvements we've made to our experience are resonating with clients and we're seeing that reflected in the momentum in our business. We have some exciting work planned as it relates to Gen AI and style visualization. We believe we have the opportunity to help our clients better understand what our styles can look like and provide inspiration within our core experience. There is exciting work to come!

***Thinking a little more deeply about interactions between AI and internal systems, how does Stitch Fix approach things like inventory planning and merchandising - making sure you have the right brands, the right sizes and so on - and where have you either considered employing AI or already deployed it to streamline those processes?***

We have developed a proprietary AI-driven inventory management tool that analyzes our exclusive transactional data and client feedback to predict demand at both the individual style and client level. This empowers our merchandising team to make smarter, more efficient buying decisions across key categories. With it, we're able to drive more relevant inventory buys, improve margins, and increase client satisfaction as a result.

***How do you see AI influencing or supporting the future of Stitch Fix? It might be unifying different elements, such as the Fix model and your curated eCommerce experience, or it could be something completely new.***

We are investing in inspiration in all its forms. We recognize that inspiration looks different for everyone, and we are committed to offering the most personalized and client-centric shopping experience.

With AI, we're not just streamlining choices, we're sparking imagination. Our goal is to help clients see themselves in new ways. Everything we do is about helping our clients find the styles they will love that fit perfectly so they can be more confident in what they wear. I believe AI can help with that.

By combining the power of AI with the insight and empathy of our Stylists, we offer something truly special. Together, they create an experience that's deeply personal to each Stitch Fix client.



# AI & THE FUTURE OF LUXURY, STATUS, DIFFERENTIATION, AND OWNERSHIP

AS ARTIFICIAL INTELLIGENCE  
EVOLVES, LUXURY FASHION  
FACES AN IDENTITY CHECK.



## BETHANIE RYDER, INVESTIGATIVE JOURNALIST

Bethanie Ryder is a writer exploring the intersection of technology and luxury fashion, with a focus on internet culture and how digital shifts are shaping Gen Z and Gen Alpha's spending habits. After completing an MA in Fashion Communication at Central Saint Martins, she served as Tech Editor and fashion writer at Chinese luxury publication Jing Daily for three years. She now works as a freelance journalist, continuing to investigate the evolving dynamics between fashion, innovation, and youth culture.

With generative algorithms now out-sketching seasoned designers and machine learning models producing entire collections overnight, AI's acceleration of access, speed, and scale has left the industry bracing for a shift: when anything can be generated at a clip, what still feels rare?

Luxury's reaction mirrors AI's growing grip on culture. Industry outliers – like Balenciaga and Coperni – have quickly woven the tech into their creative codes, tapping AI to unlock the next phase of their narrative arc.

But not everyone's leaning in. Among the old guard, resistance is rising as brands push back against the ubiquity of machine-made design.

Take Prada. For Fall/Winter 2025, the brand staged a quiet revolt, described by Miuccia Prada as "a reaction to the first season of artificial intelligence." Juxtaposing materials, patterns, and silhouettes served as visual counterpoints to the algorithm-fed digital age, swerving left where data would've gone right.

Tod's has followed a similar path. For Spring/Summer 2025, the leather house debuted a subtle dig at digital dominance with its "Artisanal Intelligence" campaign. Presented at Milan's PAC museum, the menswear collection spotlighted the hands of its artisans – celebrating masterful stitching, meticulous construction, and the quiet luxury of time-honoured craft.

Cynics might call moves like these savvy branding, or timely counter-narratives to the AI gold rush. But their defiance signals something deeper: heritage houses reasserting the value of human touch, and a recalibration of luxury in the algorithm age.

"I believe we are witnessing the emergence of AI-free luxury as a kind of counter-status symbol," says Oliver Haus, a freelance creative working with AI and MA Fashion student at the Royal College of Art in London. "In a world increasingly saturated with AI-generated content — where much of what we see, wear, and consume is algorithmically produced — the presence of genuine human input is gaining renewed value. What's rare becomes desirable, and human time, intention, and imperfection might become the new markers of luxury."

## AI AND THE REDEFINITION OF STATUS

If AI can generate couture-calibre garments at scale and speed, what happens to exclusivity? The hallmarks of high fashion – scarcity, craft, and time – risk erosion as generative tools edge closer to mimicking the nuance of the handmade.

The ascent of AI design tools has unleashed a new class of disruptors rewriting luxury's rulebook. Among them is Draup, the digital fashion platform founded by Daniella Loftus in 2023, now part of Tribute Brand. Draup merges AI-driven design with traditional codes to create couture that "moves at the speed of online culture." Its generative algorithm determines cut, colour, material, and silhouette. Pieces are currently limited to digital, but real-world applications are fast approaching.

While platforms like Draup broaden access to luxury, this abundance threatens couture's core tenets of rarity and human imprint. Some foresee a subsequent bifurcation: on one side,



BALENCIAGA

## “ AMONG THE OLD GUARD, RESISTANCE IS RISING AS BRANDS PUSH BACK AGAINST THE UBIQUITY OF MACHINE-MADE DESIGN. ”

efficient, hyper-personalised AI-powered couture; on the other, fashion that embraces slowness and imperfection.

In this paradigm, human-made fashion, flaws and all, may not only hold its ground, but gain cachet. “As AI learns from existing digital data,” Haus says, “the most distinctive work may start to come from sources that are not online — archives, vintage publications, memories, handwritten notes, personal encounters. The creative who takes the time to source from these places could offer something truly unique. But this comes at a cost: time, dedication, effort. And so luxury may begin to reflect not just material rarity, but also the rarity of deep personal research and analogue process.”

It raises a pressing question: will consumers start paying more for fashion that’s explicitly non-AI? Anne-Liese Prem, an emerging tech trends scout and Head of Cultural Insights & Trends at digital agency Loop isn’t convinced. “Probably not automatically,” she says. “‘Non-AI’ isn’t enough on its own to command a premium. High-end consumers aren’t nostalgic. They’re not necessarily sitting around craving handmade jackets just because they hate AI. Non-AI will matter, but only if it’s connected to a creative

idea that stands apart from what AI can easily fake. What will command a premium is creative originality and emotional relevance, not the fact that it’s human-made by default.”

Product alone also no longer cuts it, argues Haus. “We already have the tools to produce almost anything, almost instantly. So what becomes rare — and therefore valuable — is not the object itself, but the world around it. The experience. The materiality. The narrative of where something comes from, how it was made, and who made it. Luxury may evolve into something less about possession and more about immersion: the feeling, the ethics, the care behind the thing.”

### AI’S ENVIRONMENTAL IMPACT: A COMPLICATED STORY

AI’s impact extends beyond aesthetics and value. While proponents have pitched it as a fix for luxury’s sustainability issues, the truth is much more nuanced.

Tech advocates frame AI as an antidote to inefficient production and overstock. But whether AI’s environmental cost outweighs that of traditional luxury remains unclear — especially as legacy houses face scrutiny over fast-fashion parallels and supply chain ethics.

Still, when used strategically, AI may offer sustainability gains. From streamlining supply chains and minimizing physical prototypes to forecasting demand and improving logistics, AI can enhance operations without compromising craft.

Yet some industry voices remain sceptical. “AI optimizes for speed, which is the antithesis of craftsmanship,” says Brede Rørstad, co-founder of creative studio No More Mondays and fashion print platform Fiol. “Craftsmanship and true quality is slow by nature. The idea that AI will solve fashion’s environmental issues is also misleading. AI doesn’t change the amount of fabric needed for a garment. Only buying less, and buying better, can lower our footprint, and I don’t see how AI addresses that.”



DRAUP, DANI LOFTUS.

## A POTENTIAL DIVIDE?

Could AI-driven fashion carve out its own lane? Some suggest the future won't be a clean break, but a dual-track evolution.

"The difference lies in intent," says Haus. "Those who synthesise AI with their own research, intuition, and handcraft may unlock new levels of innovation. But those who lean too heavily on what AI already knows risk producing work that is derivative, or even predictable."

Rørstad agrees. "Just like designers moved from pencil and paper to Photoshop, Illustrator, and CAD, consumers today won't really care how designers create, as long as the work resonates," he says. "AI is simply another tool. It's still the designer – the human – who creates. However, if the work becomes AI-centric or is used too literally, it could easily backfire."

While splashy AI campaigns like Valentino's 'Maison Valentino Essentials' and Moncler's 2023 collaboration with MaisonMeta have slowed, traditional houses haven't completely abandoned AI – they're just applying it more discreetly.

It's a smart move. As tools mature, they offer smarter sourcing and forecasting. Tech and tradition needn't clash; instead, AI may function as an invisible architect of process.

This quiet integration is especially clear in luxury jewellery. At Tiffany & Co., advanced coding helps craft precise cuts, pushing gemstones to shine brighter. At Boucheron, AI-enhanced 3D printing speeds up design without sacrificing artistry. AI is even refining provenance, with smart grading systems like Sarine's offering next-level transparency.

Bespoke luxury is evolving, too, with custom couture becoming more accessible thanks to tools like Clo 3D, which allow for digital visualisation before physical creation.

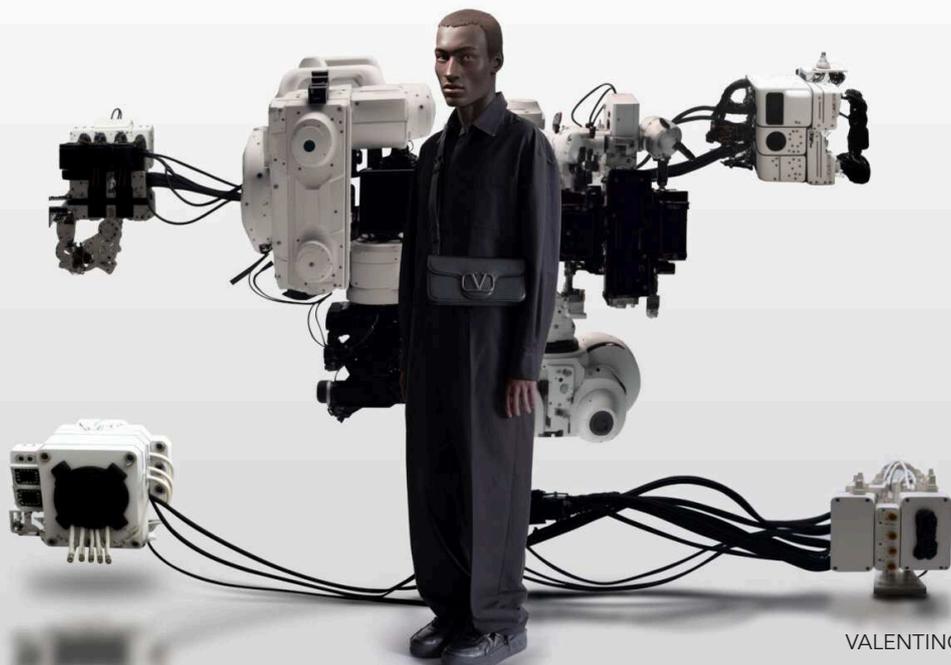
## SUBTLE INNOVATION, ENDURING VALUES

Navigating this tension between innovation and tradition, brands like Brunello Cucinelli are candid about AI's potential and its risks, with founder Cucinelli coining AI as "a new handmaiden that accompanies human beings to inspire and renew their genius and creativity."

That spirit guided the rollout of Solomei AI, the house's in-house tool and minimalist beta website, which offers visitors a curated archive and an AI-powered chatbot. Soft-touch approaches like these not only avoid customer alienation, but align with luxury's values of storytelling and timelessness, using AI as a subtle enhancement, not replacement.

But even as the industry moves deeper into an AI-saturated future, the real measure of luxury may not be how fast or flawlessly something can be made, but how deeply it resonates.

As Prem puts it: "The more AI-generated fashion I see, the more certain I become of this: true luxury still comes from human creative genius. AI can replicate style, but it can't feel the nuance of a cultural moment or disrupt expectations the way a human mind can. In a world of infinite generation, the real scarcity is true creative vision. Brands should guard their instinct like it's their most valuable currency. Tech is the baseline, but instinct is the real luxury."



VALENTINO

# THE STRUCTURE STRATEGY

**CAN AI IMPOSE ORDER ON FASHION'S CHAOTIC  
WORKFLOWS? AND DOES IT NEED TO?**



**KARINNA GRANT,  
EDUCATOR, INNOVATOR  
AND ENTREPRENEUR**

Karinna Grant is an innovator, educator and entrepreneur. She is a speaker and a published writer, having consulted and lectured globally on retail innovation and digital transformation. Previously she founded HOT: SECOND - a circular economy concept store trading physical goods for digital experiences and co-founded THE DEMATERIALISED - an experiential marketplace for NFTs. In 2023 she gave a TED talk on 'What's the Point of Digital Fashion'. Now she has just launched keeper - a collective cultural ownership™ platform for iconic fashion objects.

The chaos, creativity and unpredictability of fashion has, for decades, been part of its elusive charm and its ability to seduce people on the outside looking in. But insiders have the battle scars to show how fashion's inherent complexities, uncertainties, and inefficiencies, as appealing as they might look from the outside, end up in waste, financial loss, and a state of perpetual reactivity and firefighting.

No matter which part of the fashion value chain you operate in, from production, to marketing, to the sales floor, you've encountered the nagging idea that, when it comes to process orchestration, enterprise organisation, workflows, data centralisation and all those other backend business elements, fashion can and should do better. For a supposedly innovative and dynamic sector, ours has been relatively slow in adapting new processes and systems for the better, whether that be for efficiency or sustainability.

But there's a new tech saviour in town. Artificial Intelligence (AI) is being hyped up, right now, for its ability to come to the rescue and solve fashion's most serious ailments by imposing structure and order where other big technology pushes have failed - or by, at the very least, helping the people who work in fashion to extract real insights from disorder. In the process of rolling AI out, though, fashion is learning (the hard way) how ill-prepared its data foundations and process structures are, and how different they look from what AI systems expect. While fashion has thrived, against the odds, by tasking people with reconciling different priorities and different workstreams, it's less than clear whether applying the same philosophy to AI - which appears to operate best in domains with structure and well-defined rules - will work.

And that disparity could become even more visible when we think about how AI struggles with improvisational problem solving and cultural nuance - both of which are highly prevalent within fashion. Right now, a gap in both knowledge and practice exists, a murky grey ball of confusion, and at the centre of fashion's ambitions for AI, is the idea that it might be able to impose order on the industry's cluttered workflows. Between the two, how are we going to determine whether human-led or machine-led knowledge should penetrate specific workflows (i.e. design, forecasting, sourcing)? Not only that, but when to integrate AI is another big question mark. Should fashion organisations wait till they need to medicate with AI (the point at which they feel as though their human-only capabilities are falling short of market demands and upstream complexities) or should they adopt it as a more preventative measure?

Or to put it another way: what is fashion, an industry renowned for succeeding in spite of an ongoing mess behind-the-scenes, actually supposed to do with AI? Are the two worlds on a collision course, or can they actually complement one another?



If fashion is from Venus, then AI is from Mars. Fashion is by its very nature, subjective, non-linear, emotional and intuitive - 'human'. This is mirrored throughout many of its core workflows from garment design and fitting, to brand identity and personal selling. David Lindsay (Co-Founder Yallus, former CTO LVMH, Farfetch, NAP) suggests there is a "human attraction to thinking that creativity is in some way indefinable". Conversely, today's 'narrow' AI can be characterised as objective, logic-based and focused - 'machine-like'. Some say 'soulless' - a critique I'll revisit shortly.

Today, therefore, a gap exists, Gala Marija Vrbanic (Founder and CEO of TRIBUTE BRAND) identifies that 'the biggest gap remains in the creative execution. Specifically, the ability to replicate individual taste. In fashion, personal sensibility drives originality and impact, and AI still lacks the nuance to fully mimic that.'

But is this an intractable disconnect between two very different entities? Or could the clash between how fashion operates and how AI works actually be just like the many personality clashes we have seen before, between buyers and merchandisers, or creatives and developers?

Whilst these two beasts are stereotypically like chalk and cheese, they do actually complement each other, as each has opposing strengths and weaknesses. When brought into a hybrid workflow with the right timing, for the right task and for the right purpose, it can be argued that together, they are better. After all, fashion has successfully wrestled with the same tension between spontaneous creativity and rigid commercialisation basically forever.

To help illustrate how this might all play out, the table below shows four levels of AI Adoption, with the overarching function that AI plays at each level and a division of operational use cases. I have delineated the different domains according to whether AI currently excels or struggles with the task, to help determine where AI augmentation / automation could be the answer, and also where hybrid workflows might be better.

**TABLE:  
FASHION VALUE CHAIN  
ACTIVITIES X HUMAN  
VS AI LED WORKFLOWS**

Level	Main function of AI	Fashion Use Cases where AI Currently Excels	Fashion Use Cases where AI Currently Struggles
<b>1. Tactical AI</b>	<b>Automation (operational efficiency)</b>	<ul style="list-style-type: none"> <li>design ideation</li> <li>pattern creation</li> <li>production processes (cutting, stitching and assembly using AI-driven robotics)</li> <li>cloth simulation and colour matching</li> <li>editorial and advertising campaign creative</li> <li>digital ad targeting</li> </ul>	<ul style="list-style-type: none"> <li>creative execution</li> <li>design without biases</li> <li>garment fitting for diverse body shapes</li> <li>quality control and testing</li> </ul>
<b>2. Functional AI</b>	<b>Augmentation (data driven decision making)</b>	<ul style="list-style-type: none"> <li>virtual sampling and prototyping</li> <li>trend prediction</li> <li>material selection</li> <li>inventory forecasting</li> <li>supply chain optimisation</li> <li>virtual fitting rooms and try-on experiences</li> </ul>	<ul style="list-style-type: none"> <li>materials sourcing</li> <li>cultural nuances</li> <li>production logistics</li> <li>supplier negotiations</li> </ul>
<b>3. Strategic AI</b>	<b>Integrated Intelligence</b>	<ul style="list-style-type: none"> <li>personalised customer service</li> <li>personalised search and recommendations</li> </ul>	<ul style="list-style-type: none"> <li>brand vision creation and identity storytelling</li> </ul>
<b>4. AI-Native</b>	<b>Operating Layer</b>	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>N/A</li> </ul>

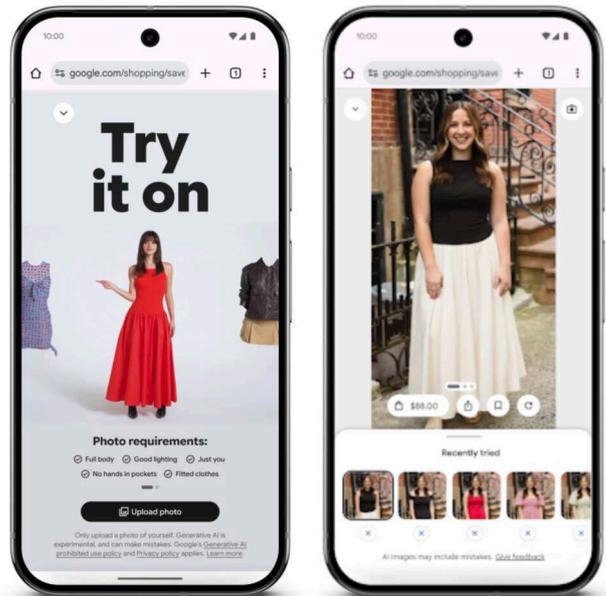
Looking at the first, most basic level of AI adoption, automated workflows are primarily undertaken to achieve operational efficiencies, or to achieve the fabled freeing up of creative time by easing the administrative burden. These are culturally uncontentious areas for brands to explore, since the vast majority of people will readily accept the aid of technology to reduce or eliminate anything they see as busywork.

One example of this is [Hermes](#) who recently explained they are using AI only for “limited applications, including IT service optimization, supply chain support, and internal reporting via external cloud-based platforms”. Hermes also clarified that “creative and artisanal processes will remain human-led”. This approach is conservative, sure, but also safe and logical for a heritage luxury brand of its stature and scale - one that venerates its creatives.

At the other end of the market is [Zalando](#), who just reported that 70% of its editorial campaign images were AI generated in Q4 2024. This innovation led to a cost reduction of 90% and a speed to market of 5 days rather than 7 weeks. A solid implementation success case which will undoubtedly have a ripple effect to other brands who will adopt their methodology. But also a clear step over a line where AI is imposing order onto creative tasks in a way that uplifts the efficiency of those tasks, but at an uncertain potential cost to creative and human expression.

Looking at the next level of functional AI, which is probably the most frequently adopted form of AI within fashion right now, we see AI aiding and augmenting decision making and ideas at speed with large data sets - huge and hugely complicated corpuses of information that are simply beyond the realms of human capability to effectively analyse. And this is also the type of AI use case that transcends in-house teams and begins to spill out into optimising not just the way products get made and sold, but how prospective buyers engage with and experience those products, and the brands behind them.

The recent launch of [Google's](#) ‘AI Mode’ for shopping is a textbook example of this, as it includes contextual search, price comparison, virtual try-on and an agentic checkout experience. Time will tell how successful this new mode will be, although most features are only available in the US so far.



Google AI Mode for Shopping

Another more creative workflow application of functional AI is designer [Norma Kamali](#)'s use of AI as a tool for brand reinvention. Kamali collaborated with Maison Meta on a proprietary model to reinvigorate several of her iconic designs. Interestingly it was Kamali who proclaimed after the project that “AI doesn't have a heartbeat, it can't replace human passion, but it can enhance creativity in ways we're only beginning to understand”. Two very different worlds that seem to work well together - even if the taxonomy to describe that interaction is difficult to define.

On a more straightforward workflow optimisation track: last month [Walmart](#) promoted the results of an internal proprietary AI product called ‘Trend-to-Product’. Using both AI and generative AI it analyses global trends, creates mood boards, provides collection names, colours and textures as well as outputting a supplier tech pack. The results here were similarly measurably to what Zalando saw with its structured roll-out: Walmart states it has reduced their concept to completion cycle by 18 weeks, describing this new workflow as being ‘people-led and tech-powered’.





Maison Meta for Norma Kamali - Crafted with Norma's custom AI model

Continuing up the ladder, the next level of adoption is strategic AI, where it is embedded deeply throughout the organisation as integrated intelligence. Platforms like the heavily funded [Daydream](#) or new-kid-on-the-block [Phia](#) are current examples of this. Each of their business models rely on strategic AI to disrupt product discovery and search (Daydream), and price based and sustainable decision-making (Phia). These are not

single function or one-domain applications; these are platforms that are proposing to use AI to replace, or at least refurbish, the fundamental pillars of fashion's business model.

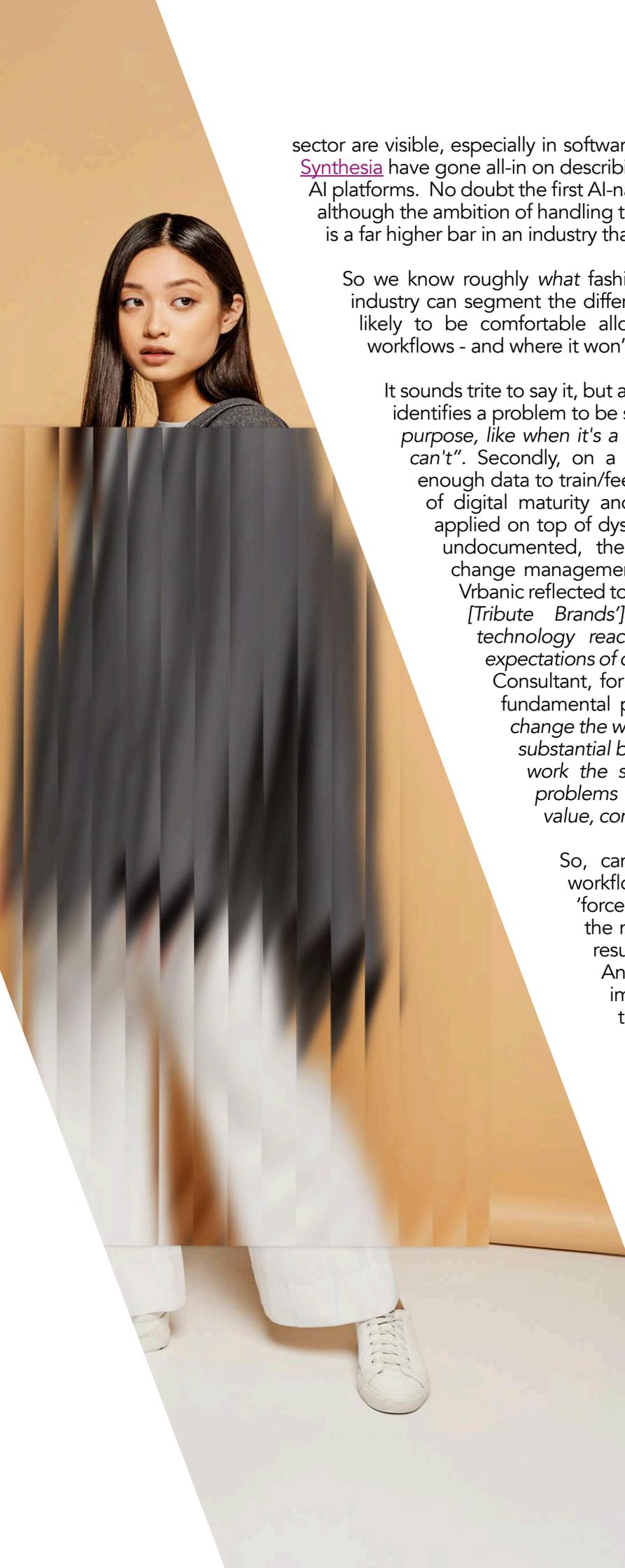
So it's notable that there are fewer fashion brands adopting this depth of practice as yet, since this perhaps tells us where the frontlines are currently being drawn between what types of structure fashion is willing to let AI impose upon it, and where that imposition becomes too strong.

A question to ponder here is why? Does this merely reflect the maturity of this tech adoption in the time to date, or is there also a correlation between adoption maturity and scale. In general, small to medium enterprises (SMEs) are more nimble, dynamic and therefore more able to adapt to change, corporates, are the opposite. However, SMEs within the fashion sector are often traditional and generationally owned (i.e. a fabric mill) or forward thinking and single person (i.e. an emerging designer). For them to introduce AI into their workflows, it's a challenge dependent on the level of innovativeness and operational discipline of the owner as well as the amount of time and financial investment needed.

The highest level of AI adoption can be described as AI-native, whereby it forms the operating structure of the business and is autonomous and self optimising. There are no high-profile fashion businesses as yet who fit this profile, however examples outside of the



TRIBUTE BRAND's new AI premium fitting service - PFS-AI™



sector are visible, especially in software where companies like [Lovable](#), [Notion](#) and [Synthesia](#) have gone all-in on describing themselves as AI workspaces and full-stack AI platforms. No doubt the first AI-native fashion brands are already being created, although the ambition of handling the entire product lifecycle, end-to-end, with AI is a far higher bar in an industry that makes physical products.

So we know roughly *what* fashion could be aiming to do with AI, how the industry can segment the different stages of adoption, where the industry is likely to be comfortable allowing AI to add top-down structure to its workflows - and where it won't. Lastly, let's try to answer the *when* question.

It sounds trite to say it, but a fashion business should implement AI when it identifies a problem to be solved, Lindsay agrees stating *"AI must have a purpose, like when it's a need, or when it's able to do something you can't"*. Secondly, on a practical level, the business needs to have enough data to train/feed it. Thirdly, there should be a minimum level of digital maturity and workflows already in place; AI cannot be applied on top of dysfunctional governance. If many processes are undocumented, then digitisation, documentation, and cultural change management should happen before AI implementation. Vrbanic reflected to me that, *"The decision to integrate AI into our [Tribute Brands'] commercial products came when the technology reached a quality standard that matched the expectations of our community"*. Joshua Young (Transformation Consultant, former Director VF Corp and Nike) adds a final fundamental prerequisite, that *"brands must be willing to change the way they work before AI capabilities can provide substantial benefits"*. He goes on to explain *"continuing to work the same way while expecting AI to solve your problems will yield negligible benefits. To unlock real value, companies must first reengineer their processes"*.

So, can AI impose structure on fashion's chaotic workflows? Yes, it most definitely could. But if it is 'forced' or adopted as a vanity metric then it's likely the new structure won't embed and the output or results could be worse than they were before. Anyone who's been part of a technology implementation project in the past will recognise these parameters, and will be familiar with how easily the target outcomes can be missed.

Does AI need to bring structure to fashion? From both a market competition and a sustainability perspective, also yes, because fashion, despite attempts to rein it in through legislation, continues to pursue strategies defined by growth. However as Young suggests, perhaps the structural changes are best orchestrated by the organisation first, and then fine tuned with AI after. At least until the finetuning becomes better handled by non-humans.

# THE AGENTIC OUTLOOK

WHAT ACTUALLY IS AN AI AGENT? HOW DO THEY WORK? WHAT MIGHT THEY MEAN FOR FASHION? AND WHAT DOES THE AGENTIC FUTURE HOLD FOR THE PEOPLE WHO CURRENTLY MAKE THE INDUSTRY WHAT IT IS?

*\*Image created using AI.*



## **BEN HANSON, EDITOR-IN-CHIEF, THE INTERLINE**

Ben has been a technology analyst for the fashion industry for 15 years. Day to day, he oversees The Interline's content, partnerships, and reports. He also hosts and speaks at industry events worldwide.

Just behind “generative,” the word most often attached to “AI” in 2025 is “agentic”. From the world’s biggest enterprise software vendors, to individual designers, developers, programmers, and executives, everyone’s trading in, or being sold on, the idea that agents are what’s next in AI.

But how many of us have a real, working definition of what an agent is? How many AI pessimists know the true parameters of what they fear? How many AI optimists know the limitations of what they’re really building towards? And if even [storied technology investors, with deep draughts of AI stock](#), struggle to come up with an agreed-upon understanding of what an agent is or should be capable of, is it down to the rest of us to shuffle through the pieces and try to assemble a whole?

None of these questions are new, but their urgency certainly is. At The Interline we wrote around this time last year about [early-stage potential use cases and considerations for agentic AI](#), and then in 2025 we picked the narrative up again to talk about [how AI agents could streamline the online shopping process to the point of becoming prescriptive](#) - as well as how the personality that large language models express has the potential to stray into [coercion and behavioural influencing](#), both problematic areas for brand-consumer interactions.

That’s a lot of adoption progress - and potentially a great deal of cultural forced evolution - in a pretty compressed window of time.

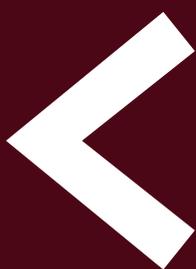
But those examples from the last year have really only focused on the consumer-facing side of agents: the idea that everyday ChatGPT or Gemini users will be (already are, in fact) asking those large models to canvas the internet for them, capture a shortlist of things they want to buy through scraping, search indexes, extracting, and existing pretrained knowledge, and then - thanks to the well-documented partnership between OpenAI and Shopify - feed into an in-app checkout or into purchase journeys that end in a traditional channel but have a very new starting point.

The consumer end is also where a lot of the early investment in agentic AI, at least in fashion, has been directed. Not just into finding products and services, and streamlining the experience of procuring them, but into the point cloud of education, support, customer service, and brand engagement interactions that exist around that transaction - with Cisco predicting that AI agents will handle close to [70% of that workload within three years](#).

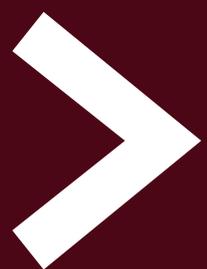
But if we believe that assigning an AI model a task and having it go away and run that task, observed or otherwise, is going to make a difference to our lives as consumers, we have to also reckon with just how large of an impact the same outcome will have on the rest of the product journey, upstream of the point of purchase. Anything that changes the outer world to the extent that agentic AI is proposing to, will also inevitably change the world of work. And anything that fundamentally alters how people research, evaluate, and choose fashion or beauty products will also end up altering how, where, and by who (or by “what”!) those products are conceived and made.

When we first talked about AI agents, back in the spring of 2024, we wrote that when it came to the idea of behind-the-scenes applications of them in planning, design, development and so on: “The current consensus – although this is far from proven in practice – seems to be that creatives will continue to bring original ideas to the table, and technology will then expedite the execution process.”

And if you want the simplest operating model for what an AI agent is intended to be, this is still about as ground-level as it gets. People set a task, and then send AI models, equipped with tools in the form of robotic process automation (spinning up a browser in a virtualised environment and clicking and scrolling through websites or web applications on a person’s behalf) or codified API-like interfaces, to work on the execution - ideally faster or better than the human could have managed for themselves.



**AGENTS DON'T GET  
TIRED, SICK, OR  
BEREAVED.**



In a very literal sense, the agentic AI promise is a case of telling a computer program to go and do work on your behalf, but with a probabilistic, natural language frontend rather than pre-coded, deterministic instructions.

This might not sound revolutionary, especially to an audience that's pretty well-versed in deploying technology to do a significant amount of heavy lifting for us. As simple as that all sounds in principle, though, that high-level view leaves a lot of practical detail, and a deep reservoir of implications, still on the table.

Most pointedly: how, exactly, is any of that AI-direction and unsupervised task completion supposed to work in an environment where even broadly-intelligent and generally-capable human beings struggle to navigate individual platforms and solutions, let alone ecosystems made up of tools with varying degrees of integration. Even the best-orchestrated companies, with the most refined hiring processes, don't always successfully get people to do unsupervised work - and even the most hype-prone AI labs are not promising that large language models, as they exist today, have anything like the processing space (defined in parameters for AI models, and synapses for humans) that the average human brain does.

And what does it mean if this vision does take hold, models prove they can perform complicated knowledge work, and today's creative professionals find their jobs redefined in three years' time to the same extent that their counterparts in customer service do, to where they're tee-ing up concepts and then curating the output of AI models rather than doing the direct work themselves?

There are proposed answers to the technical questions I've just asked (scaffolding, scaling, tools, and reinforcement learning are all things we're going to hear a lot more about, since they are intended to close the gaps between human and machine capability) but far fewer suggestions on what we should do with the cultural ones. Or, to put it another way, people are spending a lot of time and effort finding ways to make AI more capable of doing people's work alongside them, but decidedly less time on how the people who hold those jobs should feel.

So from this starting point of fairly lop-sided concern, perhaps the easiest thing to address is what AI agents are not - at least not right now. And the answer is: a straight, drop-in replacement for human labour. In the majority of domains, people sitting at computers and using applications and services themselves are still currently the number one choice for difficult, novel, and demanding knowledge work, and I personally think the timeline where that order might flip is likely to be years away. (The horizon may be closer for coding and software engineering.)



\*Image created using AI.



This protected status is also benefitting from some additional guardrails thanks to high-profile examples of executives betting on the labour-automation potential of AI too early, which helped to set a skeptical tone for the wider world.

Most famously, buy-now-pay-later giant Klarna claimed, in early 2024 that it had [frozen hiring humans, and that AI was doing the work of 700 customer support staff](#) - an initiative that CEO Sebastian Siemiatkowski quietly tempered last month, saying that [a drive to cut costs had resulted in a reduction in the quality of support](#) - although the pendulum has really only swung back halfway, as we'll see.

Klarna were certainly not alone in making very big, evidently premature bets on just how capable AI models would prove to be when it came to replacing human labour last year. But even the most charitable read will tell you that this was a temporary pause rather than a complete shift in a different cardinal direction - for Klarna and for the wider business community.

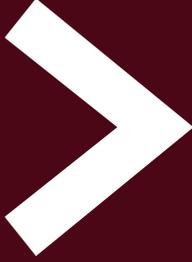
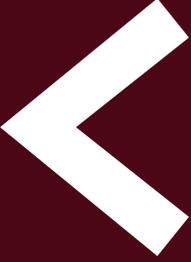
Big public corporates, which are benchmarked and governed according to the rubrics of profit maximisation and cost reduction, will inevitably come back to the well of automating work as AI becomes more capable across a wider process surface, and in deeper domains - both things that AI researchers expect to happen, thanks to the aforementioned scaffolding, scaling, and on-the-job learning, soon.

Salesforce, for instance, are already positioning themselves as sellers of "[digital labour](#)" that, to quote the company's literature, "not only handles monotonous low-value work, but orchestrates and carries out high-value, multistep tasks". If this isn't the promise of labour automation that goes beyond the most perfunctory, rote tasks, I don't know what is. And as that surface I mentioned gets broader and deeper, we're very likely to see AI supplementing (and later potentially overtaking) people in roles that we currently think of as untouchable precisely because of their long horizons and multi-stage complexity.

Or, to put it another way, even the "high-value" tasks aren't safe from the possibility of automation. And fashion has a lot of high-value tasks.

This has, unsurprisingly, been one of the AI sector's most-debated topics: the question of whether forward momentum means an inevitable loss of jobs. Dario Amodei, CEO of Anthropic (one of the big three AI research labs, alongside OpenAI and Google, and the company behind the Claude model series) went on record in late May of 2025 to say that AI has the potential to replace fully [half of all entry-level knowledge jobs](#) sooner rather than later. His counterpart, Sundar Pichai of Google, sees it [changing the job market](#) to favour

\*Image created using AI.



**EVEN THE MOST SACROSANCT  
ROLES CAN BE REPLICATED  
THROUGH OBSERVATION,  
TRIAL AND ERROR.**

people with AI-appropriate skills but to actually generate a net increase in jobs - at least at Google itself. And famed business personality Mark Cuban [extrapolates from there](#) to say that AI will catalyse the creation of so many new companies that total employment will increase, society-wide, although implied in this is the understanding that these new jobs will not be directly comparable to the ones that went before.

To cut a very circuitous and hotly-contested story short, nobody can quite agree whether AI - especially of the agentic variety - is going to lead to a paucity or a proliferation of jobs. But regardless of that uncertainty, innovation in the AI space is certain to continue, new capabilities will reveal themselves over time, and we will, at the very least, end up with a change in the nature of jobs. That seems, for all intents and purposes, locked in.

Like a lot of things in the wide-format rollout of novel technology, then, the reality (again, at least for now) of the first phase is likely to be much more nuanced than the headlines on either side suggest. And then the reality of the waves that come after will be where the extent of the transformation becomes much more clearly-defined, and much harder to ignore.

We can, though, actually get a kind of pragmatic read here by closing the Klarna loop: just before this report went to press, in June 2025, [Siemiatkowski appeared at the SXSW London event](#), where he revealed that the company had shed around 2,500 staff - not directly attributable to AI, I should point out - and that it was identifying where AI can eliminate "boring jobs" and elevate human customer service and connection to be "a VIP thing". Which sounds like an acceptable compromise until we remember that a good share of those "boring jobs" will be entry-level positions that, for all intents and purposes, represent the bottom rung on the career ladder that could be about to get harder to climb.

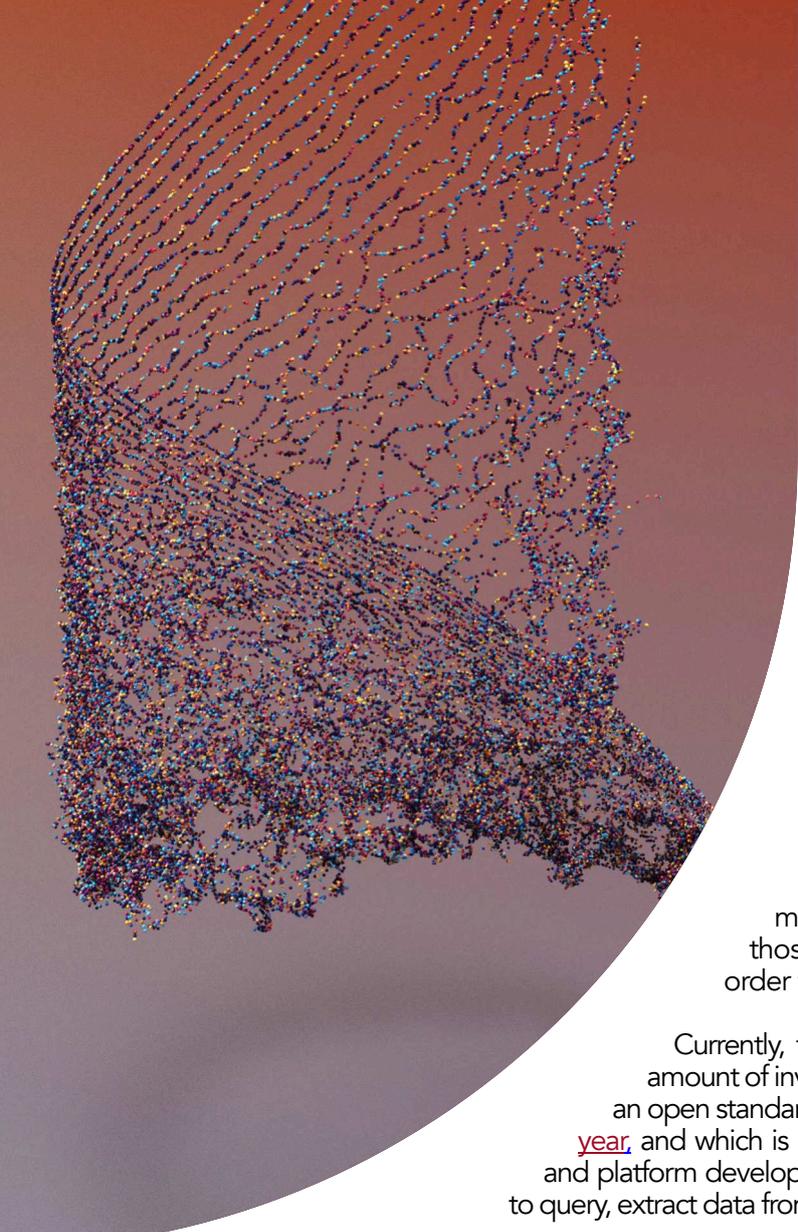
So, in this grace period where we have some early visibility into what AI agents might do to the job market in fashion, but are not yet under the yoke of immediate time pressure to prepare for more sweeping changes to the definition of labour, it's worth building a more detailed working definition for how AI agents are actually going to be expressed in fashion.

If an AI model shows up to help do your job, in the short term, or to eventually perhaps do it for you, what is it going to look like?

My own personal compass for understanding and defining AI agents is comparing them to computer process threads as we know them today. Unless you're reading this on some reasonably outdated hardware, your device's central processing unit (CPU) and integrated or discrete graphics processing unit (GPU) is not a single entity, but rather a block of different hardware cores in a package. Those cores can be deployed to run different tasks in parallel, or different segments of the same task, and this process segmentation is referred to as "threading," with processor performance benchmarked in single-thread and multi-thread domains.

This all happens in the background, and modern software, rendering engines and so on are architected to take advantage of multi-threading where it's logical.

I find it helpful to picture an AI agent in the same way: as a task thread that will eventually operate out of sight, but that for the moment requires some amount of babysitting and approval to execute a defined task. The "agency" or autonomy of those threads will be what scales upwards over time, and the vision is for AI agents to be able to complete their tasks without feedback from the commissioning user over time.



Where AI agents and process threads differ, is in how they accomplish those tasks. Unlike traditional computing processes, which have codified success / fail states and firm, deterministic ways to interact with other processes, an AI agent can use some measure of its own judgment and reasoning in deciding how to use the tools and the reasoning effort made available to it. And unlike process threads, which are completely opaque to the end user outside of performance benchmarking and activity monitoring, an AI agent will communicate its progress in natural language - and can be steered using the same paradigm.

In brief, that, to me, feels like the right way to think about agents: as independent task threads you can talk to, equip with tools like web scraping and memory, and then point at a single task (or even a body of work) with the hope that the systems it will need to interact with on the receiving end are ready for it.

And with that definition in mind, just as the state of agentic AI itself has advanced over the last twelve months, so, too, have the endpoints and platforms that those agents are expected to call on and add data to in order to get their work done.

Currently, the most obvious manifestation of that trajectory is the amount of investment being made in Model Context Protocol, which is an open standard that was [proposed by Anthropic towards the end of last year](#), and which is now seeing near-universal buy-in from AI model creators and platform developers as the optimum way to allow large language models to query, extract data from, and add information to other applications and services.

Just as APIs (Application Programming Interfaces) serve to standardise the way that different remote applications interact with one another, MCP servers allow AI agents - and AI models in general - to approach third party databases and systems, and to perform predictable actions with foreseeable results.

Prior to MCP, AI models and agents would, in a very literal sense, rely on asking other systems nicely for things using their interpretation of data schemas. If you tried an AI chat interface, prior to the dawn of MCP, that had an integration to a remote filestore, or a task database, and had it return out-of-date or nonsensical results, this was probably the reason.

With MCP, AI agents can interact with documented tools to fetch and filter data, to create entries, to manipulate existing entries, and so on - and they can also stack different tool calls into multiple steps that an agent can combine (like a person would) to accomplish tasks with multiple steps.

Think of this as the difference between asking ChatGPT to look at a screenshot of your production calendar and infer things about it based on optical character recognition, and having a model explicitly interact with your go-to-market timeline through well-defined tools that allow it to extract, act on, write to, and report on information that should be reliable.

Now, the "write to" part is where things are going to get a little bit more problematic for fashion's roll-out of agentic AI. As an industry, we already struggle with accountability, version control, data governance, and reconciliation, and for a lot of companies, the idea of giving language models read and write access to production databases is a scary one.

This is why most MCP integrations default to constant, step-by-step approvals. If you have access to a capable AI model that you can link with an MCP server (Claude 4 Sonnet and Claude 4 Opus have this natively built in, and other frontend applications for interfacing with multiple AI models also support it) then you can test this today. Link your model with an MCP server of your choice, and watch its reasoning chain as it figures out what tools to use to accomplish your task, requests your approval to call them, and then reports on its successes and failures. (You can turn these approval gates off, but I certainly wouldn't recommend it when you're dealing with mission-critical systems.)

Testing out an AI model with agentic capabilities on a task that involves interacting with MCP servers in this way can actually help to take a lot of the mystery out of what an AI agent actually is. They may be programs you can instruct by talking to them, and they may have what feels, at times, like a pretty limitless set of capabilities, but in order to accomplish meaningful work, or to provide you with answers outside their training data, they are still programs that need to call on other systems, using predefined tools, in order to get things done.

But as enlightening as it can be to look under the hood, the "magic" of agentic AI, when it's applied to fashion in particular, is going to be created through abstraction. Just as people don't think about computer cores and how they're balanced, or really consider what cloud storage and compute are actually doing, I suspect we're quickly approaching a point where AI agents are judged the way we judge people: based on performance.

And when that performance is deemed "good enough," that's when we'll begin to see rapid, snowballing change.

This is something we've already observed directly at The Interline, in another domain where general AI

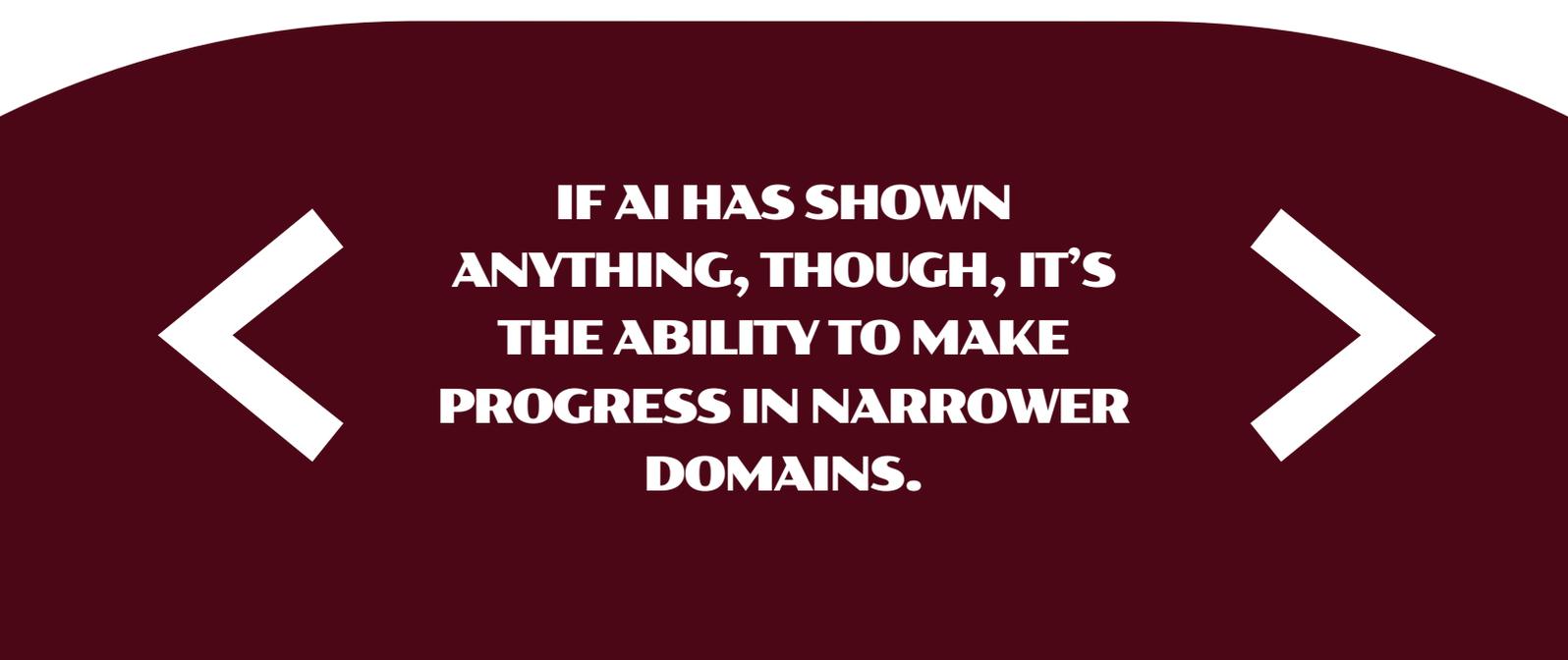
usage is giving way to agentic behaviours: search and web content consumption. As a free-to-read publication written for, and read by, industry experts, we're not exactly surprised to see ChatGPT search becoming a larger referrer in our traffic, but the speed with which "a few casual searches" has transitioned into "routine deep research queries" has been surprising.

There are, to be clear, still not many robots reading The Interline in the grand scheme of things, but it's also clear from industry conversations I've personally had, off the record, that direct to consumer brands and retailers are starting to see the same transition from exclusive organic search and shopping referrals to AI search and agentic research, scraping, and extraction becoming a bigger part of the traffic mix.

This is the kind of platform shift that can pick up pace very quickly. Maybe, by the end of this year, 5% of all traffic to your ecommerce storefront is from AI models. By the end of 2026 it's then 10-15%. And perhaps by 2028 we're approaching at least half of that Cisco prediction, but from completely the opposite side of the equation.

This trajectory is by no means guaranteed, of course. There are plenty of variables that could derail it: successful copyright cases against AI model creators; widespread blocking of scrapers; exclusive partnerships signed between particular brands and specific AI companies; and many more. But if we take it as an axiom that agentic AI use amongst consumers is set to increase further from here then, again, it follows that we'll see the same trend in enterprise.

And at that point, the discussion around agentic AI's ability to automate labour, whether it's creative, technical, or consumer-facing, stops being about capabilities and starts more heavily indexing towards other attributes.



**IF AI HAS SHOWN  
ANYTHING, THOUGH, IT'S  
THE ABILITY TO MAKE  
PROGRESS IN NARROWER  
DOMAINS.**

Because, unlike people, AI agents can be run in parallel. They can be run tirelessly in series, limited only by token, reasoning, and MCP budgets. Agents don't get tired, sick, or bereaved. They might not ever be as ingenious as your most venerated designers, or as capable as your best patternmakers or material developers, but they might just be "good enough" to step in to cover the rest.

After all, why employ 50 people to do sequential or simultaneous tasks when you have the potential to employ 5 people to each prompt, oversee, coordinate, and quality-check the work of 10 agents? Why have 50 junior designers sketching concepts, or coming up with moodboards, when 5, or even 1, could do the work instead?

How that calculus feels, culturally and commercially, is going to vary company-by-company, and will be influenced by consumer values. Eventually, though, if this train really gets rolling then I don't expect it to be one that stops. And I think that, perhaps five years from now, we'll be looking at a fundamentally different model of interacting with technology - and the services it plays host to - than the one we have today.

To wit: we can already see said train rolling pretty quickly in other industries. This year we've already seen Microsoft and OpenAI independently - with [the Github Copilot Coding Agent](#) and with [Codex](#) - expressing agentic AI through platforms intended for coders, managers, and engineers in software development, allowing them to assign work to independent AI agents who will then go after that work and report back afterwards.

And we're also seeing the early impacts of this kind of agentic assistance in the spaces where software development crosses over into the retail space. According to [reporting from the New York Times](#), published in late May 2025, programmers working for Amazon who have been given access to AI coding assistance are being asked to meet much higher performance and commit benchmarks than ever before, or to at least maintain the same standards after seeing headcount reductions of up to half - leaving those developers feeling as though their roles have changed to being focused on curating AI models rather than programming or engineering themselves.

There is a lot that's unique about Amazon, culturally and in terms of market position, to be sure, but it's easy to extrapolate this same principle to other big retailers and brands. Because as much as we think about fashion design, trend forecasting, and similar disciplines as being sacred, there's much more, operationally, that a typical brand has in common with a software company today than there's ever been. And



\*Image created using AI.



**A NEW CLASS OF FASHION  
SOFTWARE SEATS WILL  
HAVE ARTIFICIAL  
TEAMMATES SITTING IN  
THEM BY DEFAULT.**

as uncomfortable as it may be to admit, even the most sacrosanct roles can be replicated through observation, trial and error, training and reinforcement learning.

There's also evidence to support this concerning idea that universal and specialised disciplines could actually end up converging into a kind of smoothed-out notion of work. According to the [Stanford University AI Index for this year](#), generative AI deployments have acted as skill-levellers, compressing performance gaps between teams, removing the need for managers to supervise junior professionals, and helping to upskill workers in one functional area to either learn another skill first-hand... or to learn how to wrangle AI agents who already have that skill, or who have the potential to learn it.

And if this trend is happening in the offices of brands in the USA, EU, UK, and other consumption markets, then it's almost certainly happening in sourcing and manufacturing hubs where, in many cases, AI skills are more evenly-distributed.

So, for fashion professionals considering what AI agents are likely to do for them, it's important to also consider what it's doing for their counterparts on other continents - so that when AI agents interact with one another, they're doing so in a way that's both mutually beneficial and based on live data securely shared between both parties.

That last part is, I think, a critical one to let your mind dwell on for a moment. How much time, in a typical fashion workflow, is spent trading information back and forth between people? How much of that information is lost in interpretation? How often do PLM implementations end up with one party having live access to essential product data, technical specifications, and other critical information, and the other having to rely on third party chats and static PDFs?

How much would it improve the typical workflow if AI agents could not just interact with other systems, but with other agents? This, unsurprisingly, is also pretty high up the agenda for the major AI research companies: Google is proposing an "[A2A](#)," agent to agent, interoperability standard, and offering an [agent development kit](#) to allow companies to build these things at scale.

Now, as much distance as we've now travelled in just this one article (from the fundamentals of agents to full-blown, "have your people call my people" agentic multi-stakeholder interactions) we need to travel a few steps further.

Because, when we look at the mid-term horizon and take it as read that the thing missing from a complete, end-to-end, agentic fashion system isn't capability or connectivity, we arrive at the final barrier: domain-specific knowledge and expertise. This barrier is where so many cross-industry technology initiatives have faltered when they've come into the fashion industry, because there are just so many idiosyncrasies (and so much unique inertia) in our sector that what works in a general sense often falls short when it's applied to one industry in particular.

If AI has shown anything, though, it's the ability to make progress in narrower domains. We've already seen how much AI is impacting what it means to be a programmer, but there's a strong line of reasoning that this is not because of anything in-built in the models themselves, but rather because programming and software engineering are the two closest disciplines to their creators' hearts. And while AI creators do recognise that there is a distinction between domains where success is a binary completion / fail state and domains where "taste" dominates, it also seems probable that greater investment in reinforcement learning in individual areas will deliver similar progress.

To put it bluntly, there are universal frameworks being put into place to help AI learn to do not just general work, but work that is useful to particular job functions and industries. And from our perspective this means that fashion's AI product era (which my introduction and the market analysis that bookend this report talk about) is going to be defined not by how successfully AI agents can perform generic tasks, but how well they can do fashion tasks.

This is where technology companies selling AI to fashion customers are going to separate themselves from the pack. Some will promise that this onboarding, or grounding, cycle is already complete - that pretraining in fashion operations and fine-tuning on a brand-by-brand basis is sufficient. Others will approach things segment by segment, undertaking reinforcement learning cycles in footwear, eyewear, and so on. Some, no doubt, will overpromise and under-deliver, while others will bring to market products - in this case agents - that can actually do what they say they can do.

And this, really, is the key to understanding the outlook for agents that will operate behind the scenes of fashion and beauty.

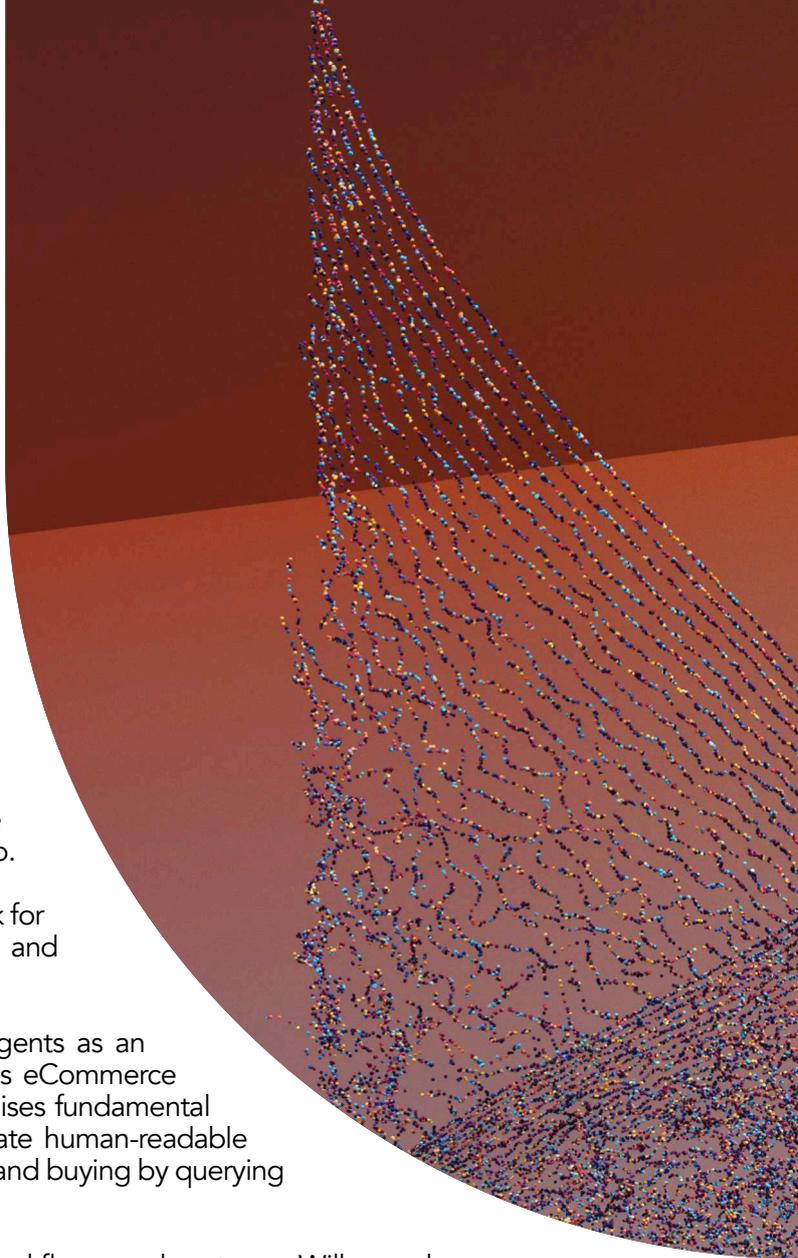
Today, the industry is hung up on the idea of AI agents as an automated army, ready to storm the buttresses of its eCommerce storefronts. This is a fair consideration, too, since it raises fundamental questions about what it means to continue to operate human-readable websites if AI agents are going to do all the browsing and buying by querying backend databases using MCP.

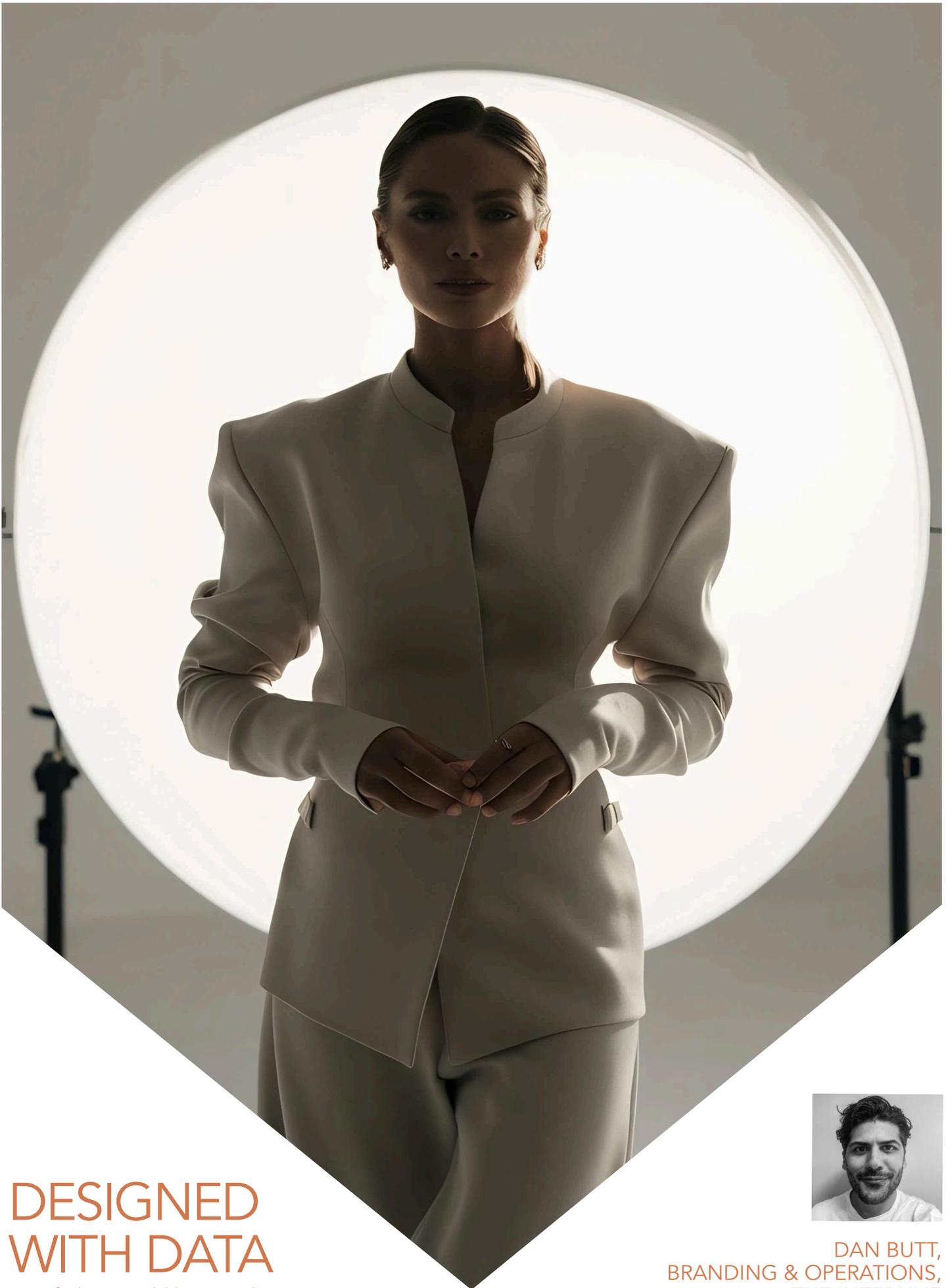
But we can extend the same logic to upstream workflows and systems. Will people continue to sit down and populate backend systems like PLM and ERP? Probably. But will the people who need to query those systems actually interact with their user interfaces, or will they task agents with finding the right product data instead? And will this make the best-connected and most deeply-deployed solutions more attractive than the best-designed ones?

Whether greater uptake of AI agents leads to a smoothing-out of jobs, a net loss of opportunity, or a net gain in growth is really anyone's guess. But I do think it's fair to say that the way we interact with product data, market data, supply chain data, and the software that contains them, is going to change rapidly. And that's already creating an urgent mandate for technology companies to figure out what that means - just as their customers need to quickly work to understand how rapidly reliable agentic workflows can really be built, and how to turn them to their advantage.

Because we're definitely still in the industry-specific learning phase when it comes to AI in fashion, but you only need to look at the technology executive interviews contained in this publication to see that things are going to progress quickly in that respect. We won't be living in the cross-industry, general purpose phase of the product era for too long, I suspect.

So I'll make one more personal prediction: right now, people talk about software licenses as "seats," because for decades it was a guarantee that the solution would be interacted with by a real person, with a chair to sit on, and a keyboard and mouse and a display to interact with. I suspect that, sooner than a lot of us are comfortable with, a new class of fashion software seats will have artificial teammates sitting in them by default.





## DESIGNED WITH DATA

How fashion could harness the potential of AI in determining what to make, and when, but without compromising its originality.



DAN BUTT,  
BRANDING & OPERATIONS,  
THE INTERLINE

Dan oversees branding and operations at The Interline, including both core fashion technology initiatives and expansion into new markets.



Fashion has always recycled itself, but the mechanisms have changed from being an exercise in conscious curation and repetition, to a newer model where trend and direction are determined by neural nets trained on last season's clicks and a broad spectrum of other variables. AI-driven trend forecasting is promising a different direction entirely : a data led glimpse into the future, trained primarily on the past, but with grounding in the near-term signals of today.

In principle, especially in an industry where forecasting is often so misaligned with actual demand, this sounds helpful. Safe, even. But if we only chase trends already validated by yesterday's best sellers, or those pre-approved by algorithms, how long before fashion stops moving forward at all - or at least before every brand is pulling in an identical direction?

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The magic of fashion has never come from predicting the future. It's come from changing it.

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This isn't a hypothetical scenario. Brands are already turning to AI to synthesise new insights from vast volumes of data: purchase histories, social engagement, influencer reach, SKU-level sales spikes, returns, and more. The result of which is prediction engines that, at least in theory, do a lot to close the gap between what the industry aims to accomplish, and what it actually brings to market. But as noble a goal as this is - anything to curb fashion's waste - it will not be surprising for the industry to soon start encountering forecasts that feel eerily similar to prior seasons, micro-trends on repeat, and future assortments that look suspiciously familiar.

When it comes to data segmentation, analysis, insight and interpretation, machine learning is a clear step up from traditional systems. But for creative and generative purposes, the people planning fashion's future direction are becoming haunted by the ghost of an idea: that AI doesn't dream, can't feel, and won't ever experience the jolt of rebellion that defines real fashion moments that respond to something instinctively human.

AI is terrific at identifying patterns, ranking them by likelihood, and produces predictions designed to reduce risk and markdowns, and optimise positioning. What's trending? What's moving? What's safe to back? What's going to sell through? What's the least likely to be returned? That question - "what's safe to back?" - could slowly become fashion's north star, because the climate the industry operates in today is so risk-prone and risk-averse, that big bets on originality are not always commercially sound.

At this juncture, it's fair to say most people know the broad strokes of how generative Artificial Intelligence works. AI eats what we feed it. If we train it on high engagement outfits from Instagram and TikTok, it'll serve back the same vibes: tweaked, recycled, and endlessly repackaged. Of course it makes commercial sense, because what the models are being trained and fine-tuned on is a filtered viewpoint on what succeeded - even if it doesn't come complete with any real understanding of what criteria determined that success. But what does it do to the designer trying to say something new? When the system rewards familiarity, it becomes inevitable that exploration will turn into imitation.

We've seen this pattern before, in other industries, long before AI got involved. Hollywood runs on sequels, reboots, and endless universe-building, because it's safe. Because the data says it works. And audiences are starting to notice: a creative diet of sameness, slicked over with gloss. Fashion is at risk of the same loop - something that it's experienced before, with big brands and major houses facing criticism for being derivative. Only this time, the gatekeeper isn't a risk-averse executive, but rather an executive backed by an algorithm and the chat layer on top of it.

But AI doesn't *have* to kill creativity. In fact, when used right, it can do the opposite - without needing a fundamental rearchitecting of the systems themselves, but rather the mindsets around them.

There's nothing inherently sinister about using data to understand trends, especially when it's done to expand possibility, not narrow it. The best case scenario is AI acting not as a creative director, but as a co-pilot: scanning millions of data points to find the unusual, the emerging, the hidden. Used well, AI can supercharge creative decision making, helping to surface regional micro-trends before they hit the mainstream, or spot material or silhouette experimentation gaining traction in niche communities. It can help designers test ideas faster and with less waste, while offering fresh inspiration from unexpected sources - subcultres, adjacent

industries, and forgotten archives. None of that replaces the creative spark. It enhances it. The designer remains the interpreter. The one who knows which signals to ignore, and which ones to amplify.

AI's real promise isn't mass personalisation or perfect prediction - those are optimisations, not breakthroughs. The real shift is creative leverage: turning oceans of raw data into strange, useful patterns, and putting that power in the hands of people who know how to turn it into something no machine could imagine. It's doing what humans can't, and doing it at scale - turning a single idea into a dozen prototypes, a rough sketch into a working draft, a mood into a marketable campaign. Not to replace creatives, but to enable them.

But that utopia only holds if we stay clear-eyed about the risks. The danger isn't that AI will replace humans. It's that it will quietly start replacing human instincts, or worse, force them to justify themselves through algorithmic logic.

When designers start second guessing bold ideas because the data says no, that has the potential to become a problem. When buyers demand proof from predictive tools before backing a collection, that's a level of brand-identity abdication that should strike fear into a generation of creatives. When fashion schools teach more about dashboards than conceptual thought, cultural awareness, sensitivity and inclusivity, that's a potential warning siren. The joy of fashion, that rush of surprise, rebellion, discovery, doesn't come from accuracy. It comes from audacity.

We've already seen what over-personalisation can do to music. Spotify's recommendation engine made discovery frictionless, but it also spawned playlists so optimised they started sounding algorithmically numb. This is great for discovering artists you like that sit in the same lane users normally find themselves in, but it's terrible for discovery. The kind that catches you off guard and reveals itself to you as a revelation for the sheer newness of it all. You simply don't get that when AI uses past data to curate.



When all you ever see is what the machine thinks you already like, you're left with soft echoes of your own taste. That becomes a problem when something genuinely new enters the frame. Not a recycled Y2K look or a fresh spin on minimalism, but the kind that rattles the system. The kind of new that punk was. Or Comme des Garçon in the '80s. Or Alexander McQueen at his most unapologetic. In those moments, the algorithm wouldn't just fail to understand innovation, it might bury it. By definition, systems designed to maximise the chances of sell-through are built to protect what's already working, which is exactly why it would rank all of the above as low-likelihood, low-engagement, and off-trend. There would be little reason to assume that bucking the trend would result in a breakout hit - and the same would hold true in the opposite direction, if fashion was going through a disruptive cycle where new silhouettes and ideas were everywhere... would an AI system tell you to follow suit, or would it recognise the potential in doing something against the grain, even if it's less experimental.

It doesn't take a huge amount of casting our minds forwards to realise that, if we over-index on systematising forecasting and planning, true disruption runs the risk of being treated not as a breakthrough, but as a statistical anomaly.

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## When the system rewards familiarity, it becomes inevitable that exploration will turn into imitation.

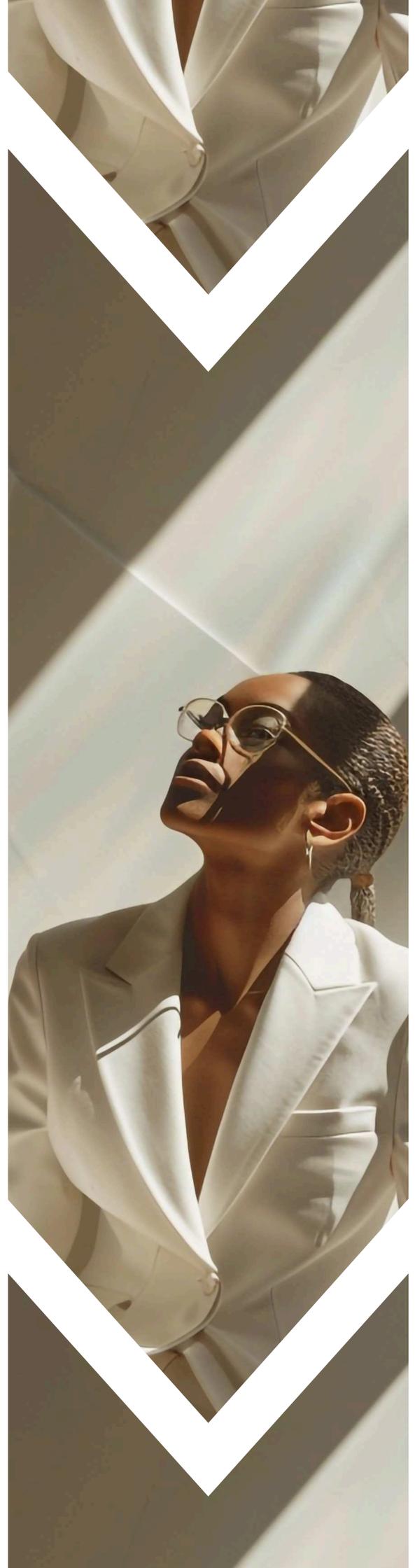
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And if we're talking about futures, we have to talk about whose future we're building. If AI learns mostly from Western, commercial, dominant aesthetics, that's the future it will continue to create. That's not a tech flaw, it's a dataset problem, but left unchecked, it could turn global creativity into a monoculture - something that we've already seen being rightly criticised in AI applications that reflect unconscious bias.

The fix is of course plain and simple: better and more comprehensive, inclusive training data. Prioritise diverse inputs. Give avant-garde, regional, and underrepresented designers weight in the system. Build tools that reflect fashion's full vocabulary, and that don't exclusively pivot on the promise of profitability.

Fashion design doesn't run on certainty. It thrives on risk, instinct, and the kind of ideas that don't make sense until they're suddenly everywhere. These are the moments that define the industry, and they don't always show up in the data. AI doesn't need to mimic that chaos, but it does need to make space for it.

The next phase of AI adoption in fashion planning, then, shouldn't be about choosing between technology and creativity. It should revolve around training systems to expect rebels not replicas, that amplify curiosity, surface the unexpected, and support designers who are trying to say something new. Because the magic of fashion has never come from predicting the future. It's come from changing it.



# WILL BEAUTY BE THE PROVING GROUND FOR PERSONALISATION?

WITH A BETTER-CODIFIED AND LESS-COMPLEX SET OF VARIABLES AND OUTCOMES, AND A MORE EDUCATED AUDIENCE, COULD BEAUTY HAVE AN ADVANTAGE OVER FASHION WHEN IT COMES TO AI-ENABLED PERSONALISATION?



*\*Image created using AI.*



## **AASIA D'VAZ STERLING, CENTRAL SAINT MARTINS**

Asia has a Masters in Fashion Entrepreneurship and Innovation, a degree in Fashion Design Technology, and has previously worked as an Associate Lecturer and Enterprise Consultant - all at London College of Fashion. She now works as a Partnerships Manager at Central Saint Martins and is also an alumna of the University of Cambridge Innovators For Sustainable Fashion

Social media feeds lit up recently with the announcement that OpenAI and Shopify had partnered to bring what they call a new frontier of personalised shopping to the masses. This news followed not only OpenAI CEO Sam Altman's claim that [10% of the world currently uses their system](#), but also the revelation that [Google searches fell in Safari for the first time ever last month](#), primarily due to end users now searching with generative AI instead of traditional search.

Together, these signals point to a potentially significant shift: consumer journeys are gradually moving away from the common experiences and narratives shaped by traditional search engines, and for the first time, toward hyper-personalised results, scoured from across the internet and delivered in conversational, relatable, and unique responses powered and generated by AI. Some of the foundations of this have been laid by algorithmic social feeds (nobody sees the same thing in their home feed as their friends, after all), but AI is now ratcheting up the personalisation another notch.

And on that basis, this coming together of OpenAI and Shopify represents more than just a strategic and well-considered collaboration; it signifies that deeper change to how we engage with the internet is coming, and for the first time since the dawn of ecommerce, the way we discover, interact and shop for products online is in an actual state of flux.

## How different categories could deliver on the vision for hyper-personalisation

Outside of enterprise circles, a lot of people are surprised at just how quickly consumer AI adoption has scaled. On top of ChatGPT becoming the most popular consumer application in history, generative AI has entered the zeitgeist in a major way. And for all the cultural questions it raises, consumer uptake of AI surfaces a longstanding home truth: that the so-called "endless aisle" of the internet is no longer what people actually want when they open a browser or an app. Instead, customers desire direct, curated and no-fuss results—needs that have gone unfulfilled in an era of information overload, volume, variety, and a firehose approach to aligning what brands make with what shoppers actually need, mediated through the arcane art of attention-based ad bidding.

And now that the masses have the tools to enact more agency as consumers, we're already seeing evidence that personalisation is a common preference. A lot of people would simply prefer to have a chatbot mediate their interactions with the web, than to spend time sifting through Google results. That matters for the people making websites, obviously, but it matters equally - if not more - to the gigantic share of brands that sell through the web.



While there's obviously a variety of opinion about the value of AI in general, within fashion, forecasters, strategists, and writers like myself are facing a deep question: we've long championed the need for hyper-personalisation as a remedy to product saturation, shouting about the benefits of recognising audiences as individuals with their own set of drivers, intentions and expectations... is AI now the right delivery mechanism for those essential ideas? And does that offset some of the reservations we have about it?

In the first instance, it's fair to say that personalisation hasn't really taken flight to date, without AI. And who could blame brands and retailers when, beyond tailored marketing, there are so many barriers to positioning such a granular focus on individual customers? When garments can be endlessly adjusted and refined to the particular needs of a consumer before being sent into a narrow, brittle funnel of sourcing and manufacturing, hyper-personalisation quickly becomes a wicked problem across workflows that the industry hasn't managed to crack.

For the moment, AI isn't proposing to solve the upstream side of the equation for garments, but, with the convergence of AI sophistication and consumer openness to adoption, it does feel like hyper-personalisation is becoming feasible at the consumer end.

And if there's an industry that is better set up to then go and execute on the creation of personalised products, it's more likely to be beauty. Why? Because not only does the beauty industry have a reputation for disruption, but it's just far simpler to draw boundary lines for the limitations of a beauty product. Where a jacket, for

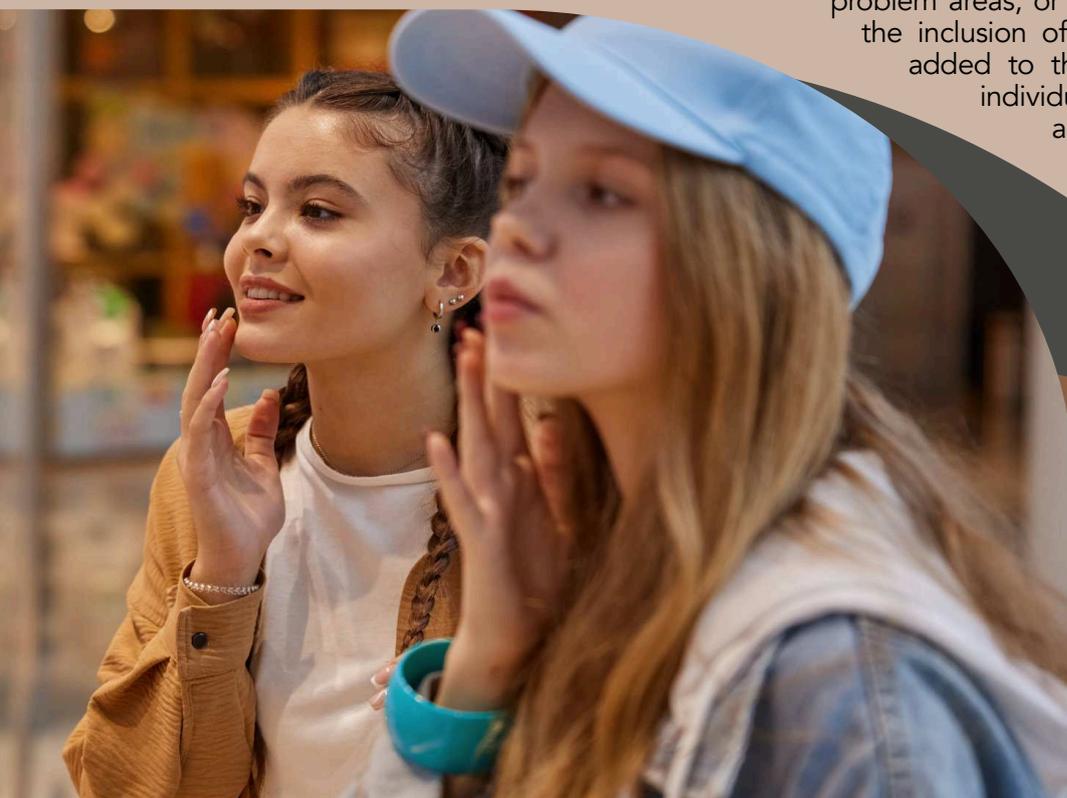
example, can vary in size, colour, use cases, and fabrication, a moisturiser, can only vary its formulation as it strives to achieve one purpose—healthy and hydrated skin.

Take makeup brand [Dcypher](#), as a real-life example, the company uses an AI-powered skin tone measurement system to create made-to-measure foundations matched to each customer's specifications. This is manageable because it works within limited parameters such as finish, coverage, skin type, and with input from an AI skin-tone scanner powered by [Perfect Corp](#). And we are already beginning to see more such examples across the industry as we move away from generic to a customisable ecosystem of products, experiences, and relationships delivered from brands straight to us as individuals.

Consumer appetite for this kind of personalisation in beauty is also already apparent: a recent Mintel report found that [62% of US beauty and personal care buyers are interested in hyper-personalised products, and 28% are willing to pay extra for them](#). And since factors like social media have placed the beauty industry at the centre of both popular and niche culture, and at the forefront of digital natives' minds, it's little wonder that personalisation at the product level—rather than just the routine—is resonating with so many.

## A new era of beauty consumer

The absence of almost complete subjectiveness found in the fashion industry provides beauty with a much more informed and discerning customer when it comes to personalisation. Just explore TikTok, Instagram or YouTube, you'll inevitably come across young consumers discussing the intricacies of a skincare routine tailored to their problem areas, or posting comments that lament the inclusion of a new ingredient that's been added to their favourite concealer. While individual outcomes vary, and claims are open to criticism, the beauty community at large focuses on objective attributes and results.



Unlike in fashion, where so much relies on taste, trends, and fast consumption, a high proportion of these young, digitally literate consumers understand facts, with a science-backed knowledge of product compositions, sustainability credentials, and specific ingredients to look out for based on their own desired outcomes.

As a result, any brand that incorporates personalisation into their product offering must provide results that are sophisticated, sensitive, and grounded in genuine science and data, not surface-level marketing that is all claims with no backing. The average beauty customer knows what they want, and it is therefore essential that brands walk the line between expertise and an openness to learn if they are to build relationships with consumers that respect their knowledge, values, and individual goals.

[Sephora](#) does this exceptionally well. With a growing youth audience known as "[Sephora Kids](#)", the retailer is currently attracting a much younger demographic who are starting their personal care journeys far earlier than the generations before them. While the retailer has always been ahead of the curve, launching [its AI-powered Virtual Artist](#) back in 2016, it was their observance and agility when they noticed customer tendencies to undertake more detailed product searches that led them to serve AI-generated landing pages based on the user's search terms and profiles.

Not only can Sephoranow meet customers where they are—responding to their desires rather than dictating need or relying on assumptions—but they can also help to reduce the time, effort, and energy needed to discover the right product without customers even realising they've been assisted.

## The future of phygital appearance

More overt AI usage within a beauty context is already a staple of everyday use for the average 16–to 25-year-old as they straddle digital and physical worlds. From personalised avatars and professional headshots, to beauty try-on filters, our phones are offering us new lenses from which to view and manipulate ourselves in a variety of contexts.

[FFFACE.ME](#), for example, is a creative studio focused on enabling brands to integrate technology into their marketing and communications strategies. Having already worked with Fenty Beauty, Maybelline, and Prada Beauty, they have a rich portfolio of AI-powered social media filters, 3D models, and virtual try-on experiences that allow brands to connect their products with individual customers in real-time, indicating a consumer desire for brands to embrace the fun, exaggerated, and interactive elements of beauty.





But, as consumers continue to desire personalisation across physical and digital channels, we are seeing the emergence of much more pragmatic tools drawn from this technology. With consumer expectations for consistent customer service, paired with product accuracy, beauty brands will increasingly need to draw a distinct line between the avant-garde and the realistic, with a knowledge of how and when to show up for their audiences, either as an immersive experience or an informative seller. And accurate try-on experiences and simulations are essential to the latter.

“We’re not simulating what users want to see, we’re simulating what’s realistically achievable based on their skin baseline and scientific evidence. That commitment to realism is core to how we support brands and build trust with consumers.” CEO & Co-Founder of [HAUT.AI](#)— an AI-powered skin analysis solution—Anastasia Georgievskaya tells me.

Her words are a stark contrast to how AI has been typically deployed until now, working to ‘improve’, ‘refine’, or drastically alter our appearances, playing with the boundaries of what resembles our original selves. Yet, the growing importance of accuracy is not to be underestimated, as brands look to use these methods to convince customers of a product’s suitability as they increasingly connect and sell through digital channels.

So as phygital solutions continue to operate with a sense of duality to not only mask our appearance but also uncover our true selves, beauty brands will now need to balance fun and engaging interactions by also going skin-deep to offer skin analysis and simulations that understand the realities of our faces, moving beyond the typical use of filters that simply sit products on top of us but instead seek to forecast their impact and results as we use them.

## **Beauty as a bridge between self-care and science**

I would therefore argue that the most significant development in beauty’s ongoing relationship with AI might be its ability to take us from the current landscape of surface-level filters or the generation of uncanny valley-generated selfies to physical and tangible changes to appearance in the real world.

And how beauty and skincare impact our physical appearance has become an essential consideration for the modern consumer. Against the backdrop of accessibility to healthcare and information becoming more democratised, recent research suggests that [82% of Americans consider wellness](#) to be a top priority in their daily routines, and in the same survey, [74% of respondents prioritise self-care and wellness](#) in their beauty rituals.

Lately, I have also seen many beauty and skincare brands declaring a shift to putting “science back into beauty”. While I was

unaware it ever left, I believe this points towards a change in how we talk about and consider beauty products as tools enveloped into our pursuit of such wellness, health and improvement. [Roughly half of UK and US consumers reported clinical effectiveness as a top purchasing factor, while only about 20 percent reported the same for natural or clean ingredients.](#)

This correlation between health and beauty is part of the reason why we have an influx of brands using biometric data to enable holistic approaches to how we manage and optimise our bodies. Within biometrics is a rich pool of opportunity to draw from the existing processes and technologies utilised in the health and wellness sectors to understand the more contextual aspects of our lives and appearances.

When questions like:

- How much sleep did you get last night?
- What's the air quality like where you live?
- What was your sugar intake yesterday?
- And are you currently experiencing any hormonal fluctuations?

can be readily answered through the convergence of data collected via everyday devices and wearables like Apple Watches and Oura Rings (which are themselves rolled up into broad health apps and platforms, some of which offer API integrations to allow other applications and services read / write access to them), brands can begin to learn how these factors impact each of us as individuals with greater speed and accuracy to support product recommendations and even custom formulations.

[La Roche-Posay have leaned into this with their Spotscan+ Coach app](#), developed in partnership with the mental health app Calm. It is a 3-month blemish-prone skin programme that pairs skin analysis with a personalised daily plan to help users consider the broader variables that affect their skin, such as stress. Then there is L'Oreal's ['Perso' device, launched back in 2020](#), which uses geodata to assess environmental factors such as weather, temperature, pollen, UV index, and humidity, to analyse and then dispense personalised skincare formulas.

Brands, therefore, should look to leverage the opportunity that connectivity between this ecosystem of datapoints presents and be conscious to contextualise their consumers with broad datasets if they are to truly make impactful formulations and accurate recommendations that help to guarantee product success and meet the modern beauty customer's expectations.

## **Personalisation in-store and at home**

Although rigid in their need for visible results, beauty consumers today have become increasingly flexible in their openness to shop across channels.

It wasn't that long ago that even the thought of buying a foundation without trying it on first seemed inconceivable, but today, it is an everyday practice thanks in part to the maturity of virtual try-ons, skin analysis, in addition to globalised markets and expanded product ranges for diverse skin complexions, types, and textures.

*\*Image created using AI.*



In fact, until relatively recently, personalisation has borne the hallmark of a luxury in-store experience. And it is clear to see why, with individualised communications, one-to-one consultations, and bespoke-made formulations, these types of experiences used to take a considerable amount of time, money, and resources to deliver.

Launched back in 2016, [Lancôme's Le Teint Particulier](#), was initially designed as an in-store service that scanned a customer's skin in three different locations to precisely analyse the type and shade of foundation they require, to then build a custom foundation formula that matches a customer's skintone. Yet, the brand has now shifted focus to scaling various digital solutions that enable customers to engage with their products from anywhere. From matching existing Lancôme foundation shades using a database of [22,000 skin tones](#) to AI-driven skin analysis that recommends products drawing from [40,000 skin pictures](#) the brand is leveraging the ease of smartphones and channel agnosticism to offer personalisation to broader audiences.

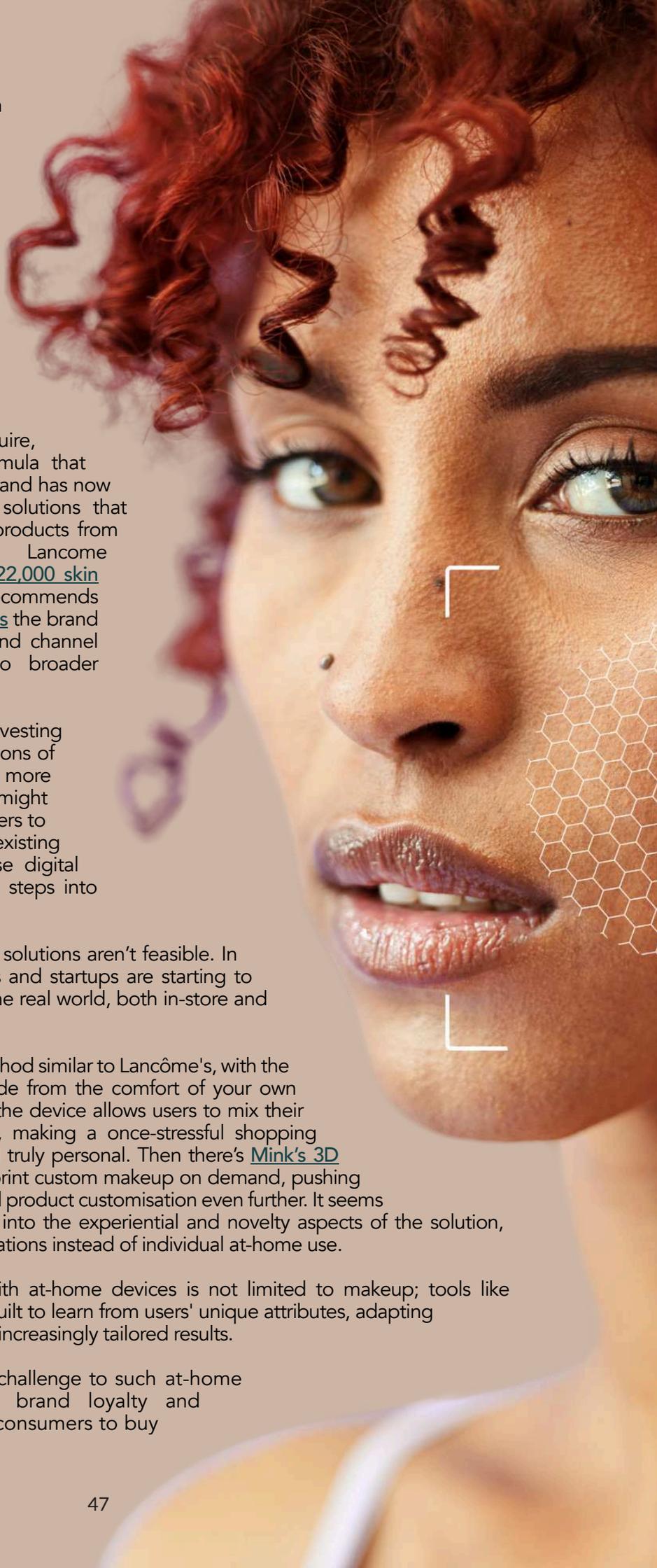
While it is not clear if the brand is still investing with the same tenacity in in-store integrations of technology, it is clear to see why targeting more scalable and accessible personalisation might be the short-term priority. With lower barriers to entry and a keen focus on match-making existing stock with customers more closely, these digital solutions feel like more manageable first steps into hyper-personalisation guided by AI.

But this is not to say that more real-world solutions aren't feasible. In contrast, digitally native emerging brands and startups are starting to see the value that meeting customers in the real world, both in-store and at-home can provide.

[BoldHue](#), for example, uses a scanning method similar to Lancôme's, with the added benefit of analysing your skin shade from the comfort of your own home. After finding your 'perfect match', the device allows users to mix their own foundation with refillable cartridges, making a once-stressful shopping process more convenient, repeatable, and truly personal. Then there's [Mink's 3D beauty printer](#), which offers the ability to print custom makeup on demand, pushing the boundaries of individual expression and product customisation even further. It seems now, however, that the brand has leaned into the experiential and novelty aspects of the solution, focusing on partnerships, events, and activations instead of individual at-home use.

This shift toward hyper-personalisation with at-home devices is not limited to makeup; tools like [Remington's StyleAdapt Technology](#) are built to learn from users' unique attributes, adapting their performance with each use to deliver increasingly tailored results.

Adoption, however, may remain the key challenge to such at-home solutions. Often requiring long-term brand loyalty and confidence in product performance for consumers to buy



into these devices. It is therefore vital that brands don't forget to pair the design of more seamless user experiences with products that genuinely deliver. It will not be enough for customers to purely access any shade of eyeshadow from a printer; it must also meet a broader spectrum of expectations, such as longevity, impact on skin and finish, if individuals are to invest in tools that create these products at home.

Many consumers may also still value the intervention and expertise of a beauty consultant throughout the customisation process, making in-store personalisations and one-to-one interactions a service that brands should continue to consider. If anything, current customer sentiments alongside the challenges of personalisation at scale highlight that the future of beauty tech will not be dictated solely at-home or in-store but will lie in accuracy, ease, and perhaps most importantly, trust in product performance over novel experiences.

## A new landscape for beauty brands, large and small

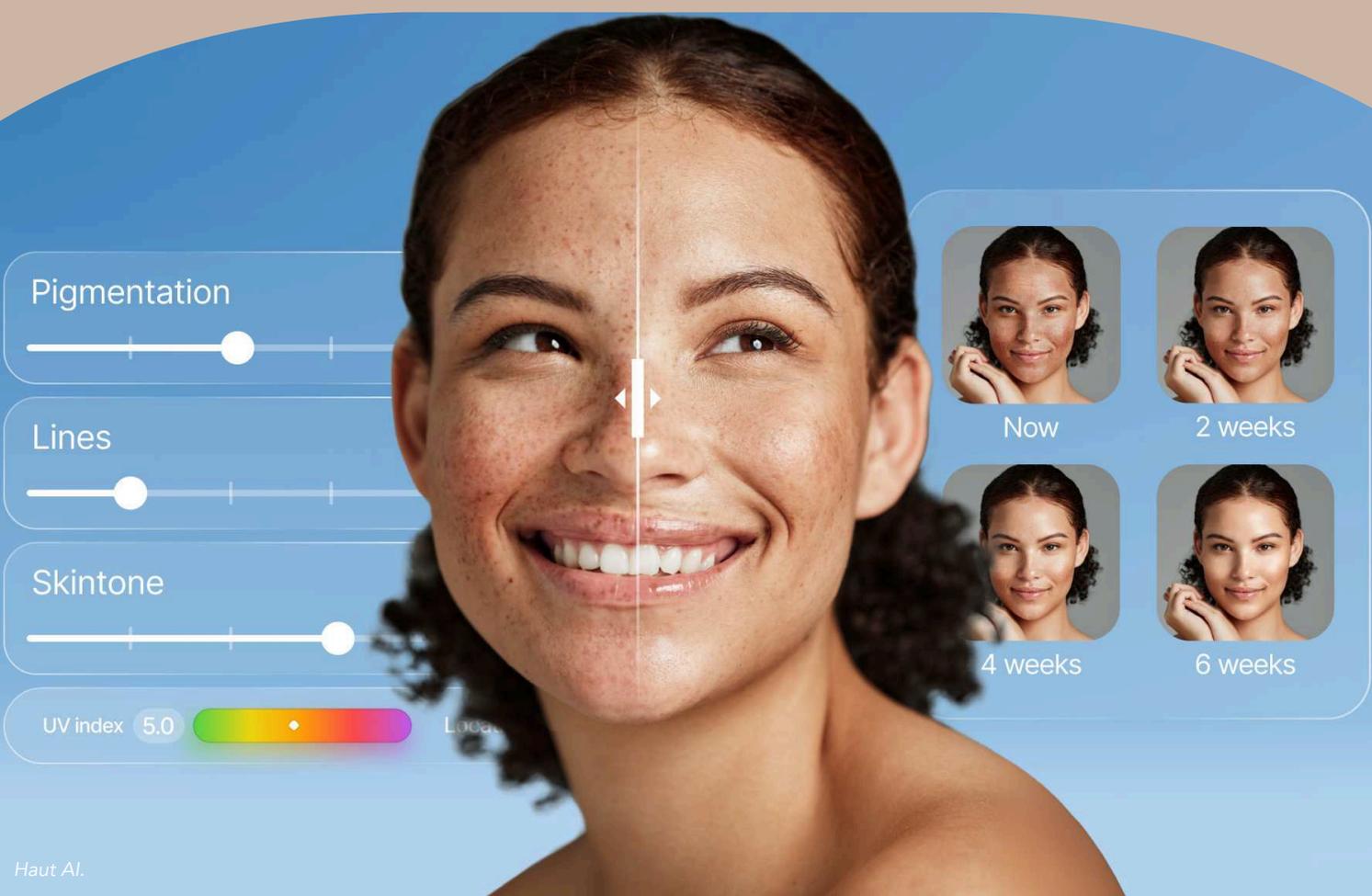
Decision fatigue is pervasive across all consumer sectors, but beauty's reputation as a "recession-proof" industry means the market has become oversaturated with choice, and the influx of eager startups has left existing brands needing to navigate a competitive landscape of low consumer retention.

With new players left and right, offering science-backed solutions, cutting-edge technology, and more inclusive approaches, it is fundamental that heritage brands diversify if they are to remain front of mind with consumers. While it is common knowledge amongst consumers that legacy beauty brands' products are generally 'good'—they've done the research and made the investment—there is a shifting mindset towards customers asking, 'Is it good for me?'

Georgievskaya explains that this was the thinking that led her to develop HAUT.AI, "Back when I was working as a researcher in a lab, I kept noticing that people were using well-formulated, clinically tested skincare products, but they were still unhappy with the results. And it wasn't because the products didn't work. It was because they weren't the right products for their skin."

And this means whole suites of AI-powered solutions are becoming indispensable to large and legacy beauty brands. From skin analysis tools, virtual try-ons, to AI-generated visualisers, these options offer easy wins for brands looking to apply the principles of personalisation to existing product offerings where individual customisation is too heavy an investment.

But this is just the customer end of the funnel, and it seems that heritage brands are already working to embed AI deeper into their organisations to inform how they provide these experiences more



inconspicuously "...when AI is part of their strategy, (legacy brands) are not limiting AI to consumer-facing experiences, they're embedding it deeply within R&D, clinical testing, and product innovation." Georgievskaya claims. And this is a promising assessment for the future of product customisation, which will require dramatic operational, cultural and creative shifts in the existing processes of large companies. Such investment in strategic applications for AI signals a pragmatic approach to how the technology streamlines internal barriers to customisation.

On the other side of the spectrum, emerging brands have the agility to build hyper-personalisation into their product range from the ground up, working with customers to fine-tune offerings at a much more granular level, growing alongside these needs rather than retrofitting solutions to them. Although this competition between depth of integration and speed of application is stiff, it does look as if the future of beauty could become a rich ecosystem of brands that learn from each other as they pilot and deploy new innovations from rapid-fire testing to carefully considered R&D.

This will be promising new ground for any tech partners with the foresight to tailor their offering to the broad spectrum of B2B client needs. What will be essential throughout, however, is that

brands of all shapes and sizes stay true to their own vision and audiences by implementing AI in ways that genuinely meet the needs of their audiences and find the right collaborators to get them there.

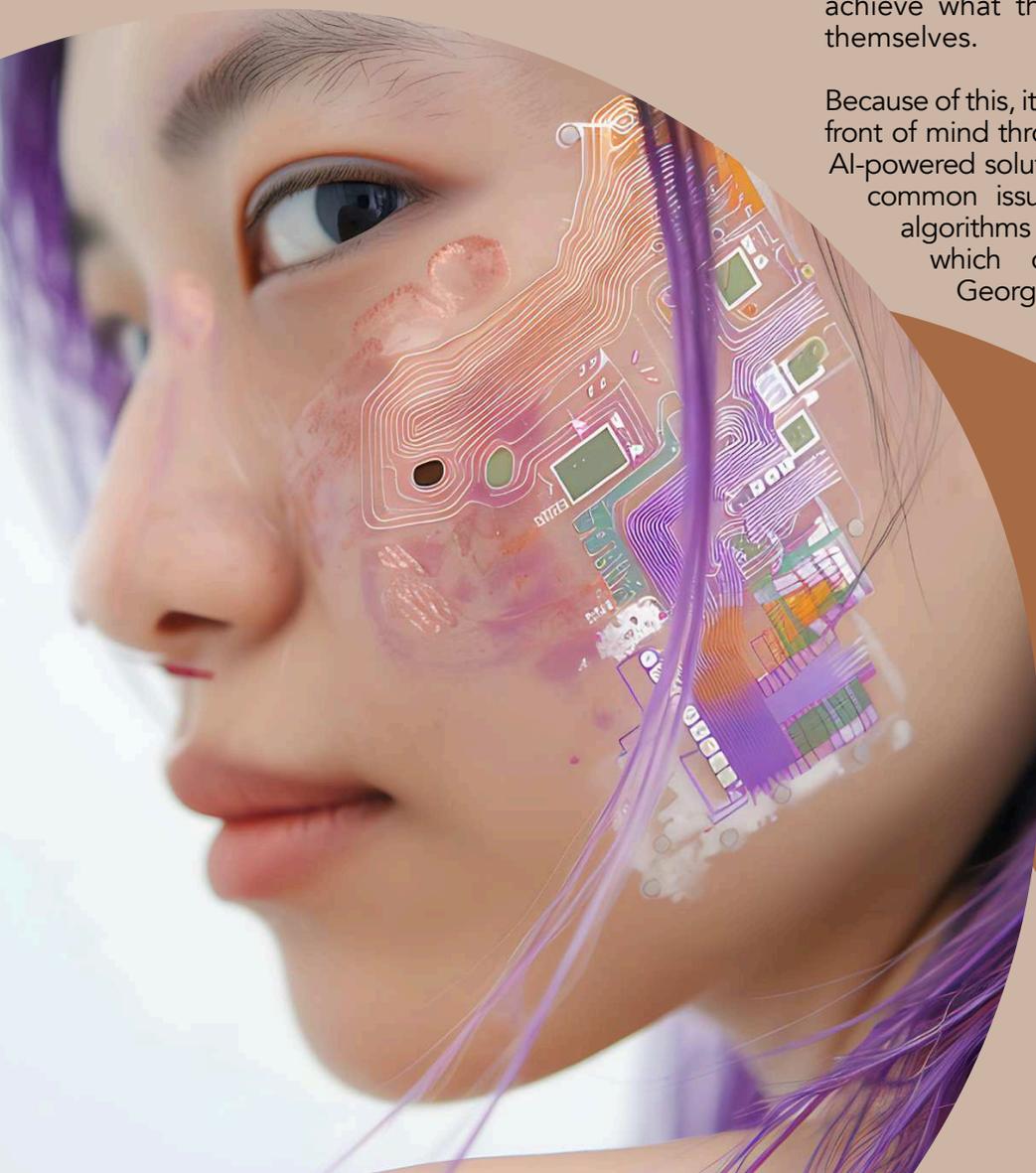
## Can hyper-personalised beauty truly be for everyone?

To answer the overarching question of this piece, it should first be acknowledged that true personalisation must go hand-in-hand with inclusivity, diversity, and accessibility if it is to effectively and accurately speak to each of us as the individuals we are.

We should then consider that both beauty and technology have historically been notorious for their lack of inclusive practices— there are countless examples to prove my point.

So within this context, I'm curious to see how these two components come together to achieve what they couldn't do for so long by themselves.

Because of this, it is key that diversity and ethics stay front of mind throughout the development of new AI-powered solutions in the beauty industry. "One common issue in the industry is that many algorithms are trained on narrow datasets, which can lead to biased results." Georgievskaya tells me before going on



to explain [HAUT.AI](#)'s commitment to rectifying such issues by building their products upon diverse comprehensive datasets, using "over 3 million facial images across diverse ethnicities, age groups, and even rare dermatological conditions". And they're not alone in this consideration of diversity, startup [Hue](#), for example, provides brands and retailers with user-generated content consisting of honest reviews to demonstrate how products work across different skin types, tones and concerns, enabling them to broaden their data-sets moving forward. Then take [Carra Labs](#) for instance, they use AI to deliver personalised recommendations for textured and curly hair care, softening pain points felt by often overlooked customers.

But Georgievskaya reminds us that there are still limitations, "even with the best data, AI isn't magic - it's a tool. And people need to understand how it works...It's not enough for a model to make a recommendation; it should also explain why it made that recommendation. This is exactly what our new Deep CARE recommendation system is designed to do. It doesn't just suggest a product, it shows the user how the AI arrived at that choice. This explainability builds trust."

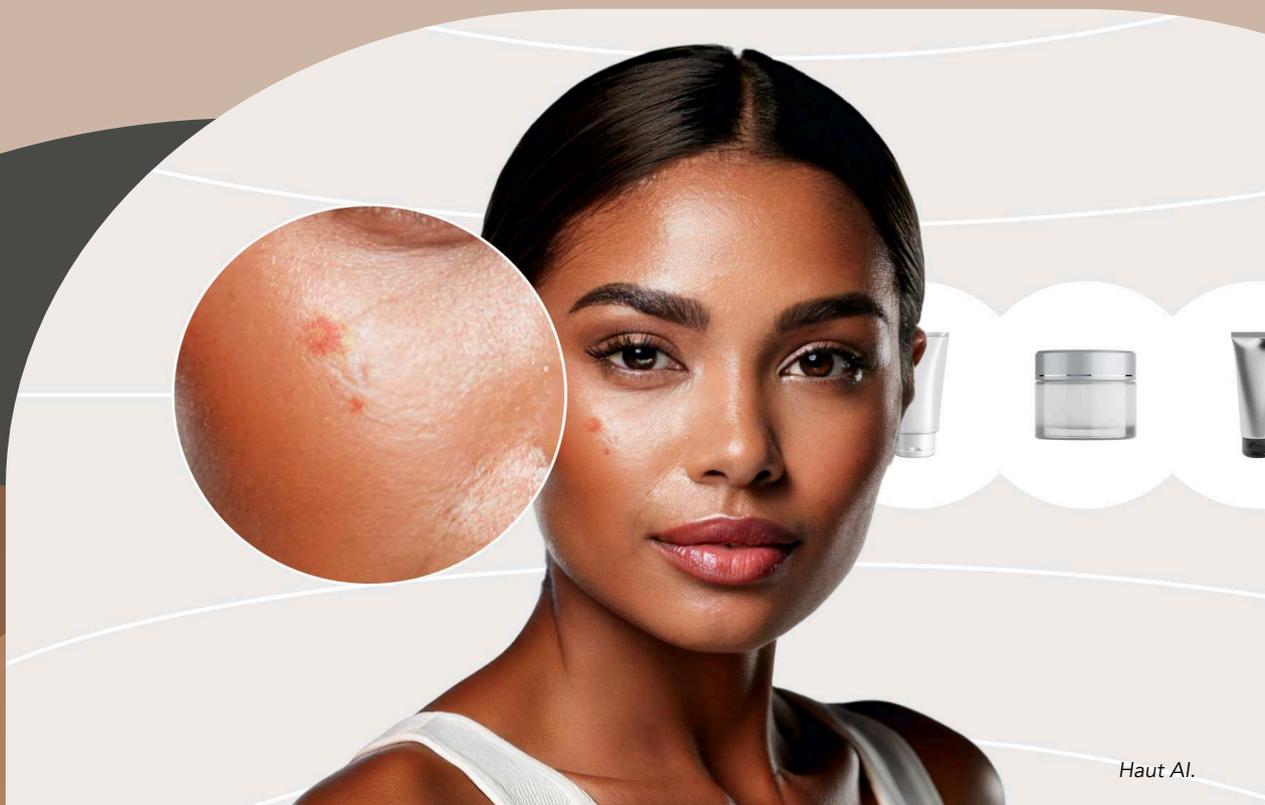
And I am inclined to agree with the potential power of "explainability" within AI. Beyond building trust, it is essential that brands have discourse with their audiences, to build feedback loops that offer customers the opportunity to understand why and how certain conclusions have been drawn and respond in real-time. Even if brands are already pulling from diverse datasets, customer input must be folded in order to scrutinise models and improve solutions if they are to truly align with customer desires.

## The future of AI-powered beauty tech

The myriad of emerging beauty-tech solutions makes me optimistic about the industry. Not only are smaller brands and startups driving fair and innovative solutions, but they also co-sign their audience's desire to be themselves, and as a result, legacy brands will also have to lean into catering to their audiences as individuals and all the diversity that ties into that if they are to compete now and in the future.

However, at this point in time, as with any new innovation, widespread adoption is often marked by an immediate inaccessibility for the average person. So while I do not doubt that the cost of more experimental granular hyper-personalisation in the guise of custom formulations and at home devices will likely pass onto the consumer in the form of higher prices in the short-term, in the longer-term, AI should allow science-backed and data-driven personalised beauty persevere helping it to become more time-efficient, cost-effective, and scalable.

For now, there is a sliding scale of options, making different levels of personalisation accessible for almost everyone. Whilst fragmented for now, I look forward to the day when these come together more seamlessly to understand the more nuanced aspects of our appearances and can deliver an experience, journey, and results designed for me and only me.



# THE UNTAPPED POTENTIAL OF UPSTREAM AI

WHILE FASHION HAS FOCUSED ON APPLYING AI AROUND THE PRODUCT, THERE'S A WIDER HORIZON OF POSSIBILITY IN EMPLOYING AI TO REDESIGN THE MOST FUNDAMENTAL PARTS OF THE PRODUCT ITSELF.



## BRENDAN COLLINS, CEO AND CO-FOUNDER, AVALO



Co-Founder of Avalo, Inc. since October 2020, Brendan Collins has a diverse background in biotechnology and software engineering. He has previously held significant roles including Software Engineer at ShopBot Tools, Inc. Co-Founder of FanPay. Brendan has a Master's Degree in Clinical Neuroscience from University College London and a Bachelor's Degree in Biology from the University of Notre Dame. Brendan has worked as a Research Assistant/PhD student at University College London, focusing on cell-based therapies, and also as a Research Technician at Bolder BioPATH, Inc., managing pre-clinical trials.

We're in the era of AI everything. AI customer service, AI website creation, AI designed beer (not a joke). In just a few years, it's become investors' dream, a cultural meme, and quite literally everything in between. And though its sudden ubiquity has made some eyes roll - it's clearly in the process of evolving every industry under the sun. And the fashion world is no exception.

But what does this reshaping look like, really? AI's ability to organize information and provide answers has delivered unprecedented efficiency in customer service and logistics. And its capacity for image generation has certainly created marketing content and inspired designers' collections.

But these uses, while impressive and at times profitable, come with backlash. Not simply because of their tendency to consolidate value and replace workers, but because of AI's massive consumption of energy and water.

The fashion industry already has a sustainability problem. For the last two decades, it's been increasingly dominated by stats like "[2700 litres of water per t-shirt](#)" and "[Between 10-40% over production](#)". The apparel industry creates over 100 billion garments annually—far more than the global population needs—driven by fast fashion and relentless consumer demand. This overproduction and overconsumption strain natural resources, generate waste, and contribute significantly to global carbon emissions.

The industry also knows this. Since the explosive [2018 IPCC \(International Panel on Climate Change\) Report](#) that outlined our short timeline to address the climate crisis, most global brands have made ambitious promises to reach set zero by 2040. And

while some brands have made progress in addressing their direct emissions, "scope 3 emissions" (those created throughout their supply chain) have remained very difficult to address.

This is because the most impactful part of the industry is in fact, the products we make. So if this amazing tech is really going to fundamentally reshape fashion for the better, it needs to address challenges further upstream.

Luckily, that's what's happening now. Thanks to recent advancements in the field of computational biology, it can. New forms of AI have the ability to affect not just how we sell clothes, but what those clothes are made of.

And it all starts with plants.

Cotton, the most sought-after natural fiber for the fashion world, is made of nothing but the long cellulose sheaths connected to the seeds of the cotton plant. And the varying attributes of these fibers (their quality, texture, color, carbon footprint and so on) are largely determined by the genetics of the cotton plant.

Humanity has been selecting beneficial plant characteristics to improve agricultural traits since humanity saved and replanted seeds from the best performing plants in the field at the dawn of agriculture, but that process is slow, expensive—with current technology—and full of guess work. That's because the genome is an incredibly complex library of dense biological data that has been historically very difficult to decipher. Luckily, analyzing and making sense of massive data sets is precisely what AI does.



All images courtesy of Avalo.

Today, biologists are able to leverage machine learning to increase the efficiency of the evolutionary process, creating more resilient and sustainable crop varieties that can address industry challenges from the very beginning.

This is done by training an AI model on the rich data within the genome of a crop species, like cotton. The AI studies the genetics of hundreds of domesticated and wild varieties (remember that in nature, the more diversity the better) in order to understand how that plant genome works, and more importantly, what it's capable of.

Put another way: Traditional Breeding works more like "guessing" - where breeders cross plants based on what they can see, and then hope for a desired result. AI breeding works more like "asking" - where scientists can ask "which plants should I cross to get these traits" and the AI can tell them.

Using AI to select which plants to breed is a totally new way to approach crop development, and has massive implications for the entire value chain (not to mention, the planet.)

**First - it drastically reduces the amount of time** it takes to bring improved crop varieties to market. Traditionally, it takes the industry 8-12 years to introduce a new variety. AI can do this in ½ the time. And with global agriculture facing pressure from a changing climate and growing population – the pace of innovation is huge. Our solutions have to outpace our problems, and by increasing the speed of evolution we can create much needed resilience into our food and fiber systems.

**Second - new varieties can be produced at a fraction of the cost** of traditional breeding programs. And less cost of innovation means...more innovation! So rather than developing one cotton variety for multiple markets, breeders can develop different varieties that are evolved for the unique challenges of being hyper-specific. For example, our new Avalo Cotton variety is specifically evolved for the increasingly hot, arid conditions in the Texas Plains – allowing it to thrive without any added irrigation and far less fertilizer. Regionally adapted varieties also make it possible to shorten supply chains by making more plants possible in more places.

**Finally - it allows for "multi-modal" trait development.** Most breeding programs focus on developing one trait at a time. But because the AI allows breeders to look at the whole genome (and all the interactions between genes) we can select for more complex concepts like "profitability" which includes balancing attributes like yield, inputs, fiber quality and more.



Image courtesy of Avalo.

**NEW FORMS OF AI HAVE THE ABILITY TO AFFECT NOT JUST HOW WE SELL CLOTHES, BUT WHAT THOSE CLOTHES ARE MADE OF.**

**AND IT ALL STARTS WITH PLANTS.**

This ability to shape multiple traits at once is where this approach will be able to reshape the fashion world. It means being able to design crops with the whole supply chain in mind. New cotton varieties deliver high fiber quality with fewer inputs (win for farmers) and create up to a 30%\* reduction in greenhouse gas emissions (win for brands, people and planet). And this ability to include farmers, gins, spinners, mills and producer needs into the “sustainable innovation” process delivers the value needed to stimulate mass adoption.



## WHAT AI IS UNLOCKING ISN'T JUST BETTER BREEDING—IT'S BETTER SOURCING.

What AI is unlocking isn't just better breeding—it's better sourcing. By harnessing the full potential of cotton genetics, breeders can develop products that simultaneously reduce environmental impact, increase efficiency and improve performance, delivering value at each point along the supply chain. Imagine raw materials bred to thrive with fewer inputs, deliver longer staple lengths to meet spinner and mill requirements, and maybe even have natural pigmentation – all coming straight from the field. A Win/Win/Win that addresses Scope 3 emissions, water usage, procurement risk, performance requirements and consumer demands all at once.

The best part of this all, is that this application of AI is amplifying, not replacing, people within the supply chain. It's creating and distributing value, rather than consolidating it. And this is critical at a time when farmers and other upstream actors are struggling to get by. It's easy to forget that fashion is intrinsically linked with agriculture, so “industry reshaping” has to include them.

Now that it can? Well, that's AI worth the hype.



*\*Based on 2024 estimates. 2025 LCA currently in progress.*



# TRUST ME, I'M NOT REAL

AI-GENERATED INFLUENCERS ARE ENTERING THE FEED. BUT IN A WORLD OF CURATED ILLUSION, DOES IT MATTER WHO, OR WHAT, IS SPEAKING TO US?



By Dr Darya Badiei Khorsand  
PhD in Fashion Management  
& Marketing,  
University of Manchester

Darya Badiei Khorsand, PhD, specialises in consumer behaviour within the sustainable luxury fashion sector. Her work for The Interline focuses on the intersection of sustainability, technology, and marketing in fashion

AI-generated models and influencers are no longer a looming hypothetical. They're already here, and they're already being put to work. What began as a backstage tool for prototyping garments has been pushed straight into the spotlight. Brands like H&M are now creating photorealistic digital clones for campaigns, raising awkward new questions about creative labour, and what kind of connection consumers actually expect from fashion media.

AI-generated influencers go further. They don't just wear the clothes, they communicate. They can talk, narrate, share routines, and speak directly to their followers. The voices are synthetic, the scripts auto-generated, but the performance is familiar enough to pass, and getting better with every new model.

So what happens when fashion's most overused word - authenticity - starts drifting away from anything remotely human? What kinds of products work in this new setup, and where does it all fall apart? To find out, I spoke with The Clueless, the creators behind some of the most popular AI-generated influencers, Venture Beyond, a DTC growth agency that incorporates AI-generated content in their campaigns, and William Lawrance, Counsel at Venable LLP, who practices at the intersection of antitrust, IP, and advertising law.

## WHY AI INFLUENCERS WORK

The logic is simple. AI-generated influencers are fast, reliable, and cheap. For brands looking to scale content quickly, that's more than enough. Unlike traditional influencer campaigns that rely on real people and the potential unpredictability that comes with them, AI-generated influencers can deliver content specifically tailored to different brands and audiences at a fraction of the price of a human influencer. Their narratives can be completely controlled, and the turnaround is almost instant. They do not need a break and can be present in multiple places at the same time. In theory, there are almost no limits to how, when and where they can be, making them an endlessly adaptable marketing asset. And for the creators behind them, this means virtually limitless commercial opportunities.

As a result, the AI-generated influencer landscape is evolving rapidly. PR agencies represent AI talent and help AI-generated influencers negotiate brand deals, dedicated awards, such as the AI beauty pageant 2024, where Moroccan AI-generated influencer, Kenza Layli, was crowned *Miss AI*, celebrate AI talent, and brands and marketing agencies are increasingly integrating them into their social media strategies.



**IN THEORY, THERE ARE ALMOST NO LIMITS TO HOW, WHEN AND WHERE AI-GENERATED INFLUENCERS CAN BE, MAKING THEM AN ENDLESSLY ADAPTABLE MARKETING ASSET.**



All images: Kenza Layli

Venture Beyond is one of the agencies leading this shift. I spoke with its founder, Shahbaz Khokhar, about how they are using AI-generated influencers, their commercial value, and how their clients typically respond to them.

According to Khokhar, how a brand responds to AI-generated content largely depends on who they are speaking to. If you talk to the owner of the business, someone driven by profit, they are a lot more open to it, he explained. "They'll usually say: just run whatever you need to run to get sales". On the other hand, when dealing with people employed by the brand, "the ethics become more important than the profit. What they stand for personally starts to shape their decision". Khokhar also noted that concerns around job security can play a role in creating resistance to AI-generated content, where some employees may be cautious about technologies that could threaten their roles. However, he believes that "those walls are going to come crumbling down pretty quickly", with the cost-saving benefits of using AI in advertising being almost irresistible. "It's a massive cost versus almost no cost", he adds. "If someone is planning a high-budget fashion shoot for £50,000, for example, we could generate the same kind of image for a few cents and create thousands of variations for them to choose from".

There's no creative director. No call times. No models, stylists, location scouts, or reshoots. Just a prompt and a few clicks - and enough content to flood your feed for weeks.

It's not just imagery anymore. With new tools - many of them built directly into platforms like Gemini and ChatGPT - brands can generate, post, and optimise

content without any humans in the loop. AI agents can now run the whole pipeline: create the visuals, publish them, track performance, and tweak the next batch based on the results.

Though it's worth considering that kind of scale has a cost. In the endless optimisation cycle, something goes missing. The offbeat, the unpolished, the *personality*. The very things that once made influencer marketing feel like it had a heartbeat.

## WHERE AI FALLS SHORT

In fashion and beauty, not everything is sold on looks alone. Some products are bought for how they function, others for how they feel, and that changes what consumers expect from the person (or persona) doing the selling.

Take fashion accessories like jewellery, belts, or handbags. These are visual purchases. If an AI-generated influencer models a pair of earrings and they catch someone's eye, that might be all it takes. "When it comes to fashion, you're just trying to present something in an aesthetic way," says Khokhar. "You're not making any kind of claim where the customer's going to be upset because they didn't have a real person backing it up."

But move into footwear, and things get trickier. Comfort, fit, and feel start to play a role, and those are things an AI-generated influencer can't experience or describe. Sure, the shoes might still be bought for their style, but if a follower wants insight into stretch, support, or how they hold up after a day of walking, an AI-generated influencer has nothing genuine to offer.



All images created with AI

Beauty and skincare raise the bar even further. A face moisturiser, for example, can be described - its ingredients listed, its claims repeated - but a script can't say how it really feels on the skin, whether it absorbs well, or if it caused irritation. In categories where trust and performance go hand in hand, like skincare, cosmetics, or supplements, first-hand experience still counts. And for now, that's something AI-generated influencers simply can't deliver.

Then again, how real is any of this to begin with? Influencer content is already a hall of mirrors. Most followers know the posts are paid for, filtered, and approved in advance. So if most of it's a curated illusion, does it really matter whether the person behind the post is real at all?

That's not to say human influencers have lost all credibility, far from it. But the trust they trade on is more fragile than it once was. As someone who follows plenty of them, I've learned to approach endorsements with caution. I don't assume they've used the product, or liked it, or even written the caption themselves.

So, what does that mean for influencer marketing? In a world where we're already questioning the credibility of human influencers - and where our feeds are increasingly filled with AI-generated, and soon perhaps fully automated, content - are we simply looping back to the era before influencer marketing began?

A time when advertising was just that: ads on TV or in magazines, fronted by people paid to demonstrate a product with no pretence of personal experience. Only now, those ads live on social media and go by a different name.

## RETHINKING AUTHENTICITY

Authenticity has always been the currency of trust. In influencer marketing, it's long been the reason people listen, engage, and ultimately, buy. But what happens to authenticity when the influencer isn't human at all? I wrote last year about the idea of virtual influencers being ['authentically fake'](#), how being upfront about their artificial nature can, oddly enough, create a kind of trust. A year later, the same question still lingers: in a world that's rapidly changing, is it time to rethink what we really mean by authenticity?

Rubén Cruz and Diana Núñez, the CEOs of The Clueless and creators of Aitana Lopez - the world's first AI-generated influencer - believe authenticity doesn't depend on biology. Instead, it depends on "the intention behind the character and how it interacts with the world around it". They



Image created with AI

explain that authenticity in the context of AI “is about the character’s ability to communicate in a consistent, meaningful, and emotionally relevant way”. Focusing more specifically on Aitana’s case, for instance, they argue that “we don’t just publish visual content - we’ve also developed her backstory, her passions (like fitness and gaming), her relationships, and her tone of voice”. This is exactly what allows many people to relate to her, follow her, and feel like they’re connecting with someone who has something to say, even if she was created by AI, Cruz and Núñez explain.

This posthuman view of authenticity turns it into a design challenge rather than a human one. If an AI-generated influencer is consistent, meaningful, emotionally resonant - does it matter that they were manufactured? Speaking personally, I believe that meanings are fluid and constantly evolving, and so are the ways we interact and communicate with each other.

We once wrote letters. Now we swipe through curated lives and communicate through digital “performance”. So yes, part of me flinches at the idea of authenticity being redefined, but another part accepts that change never asks for permission.

The redefinition of authenticity is already happening. As Cruz and Núñez point out, people aren’t just accepting AI-generated influencers, they’re following them, engaging with them, and forming real emotional connections.

When people learn that Aitana is entirely AI-generated, the most common reaction is surprise. Many don’t notice at first. But once they do, curiosity tends to take over. “They’re often fascinated by the level of realism and the narrative world that surrounds her,” they said.

In their experience, most people move past the initial shock and begin interacting with her just like they would with any other influencer. “For most, it’s not about whether she’s real or not, but what she stands for, how she communicates, and the kind of content she shares.”

The proof, say Cruz and Núñez, is in the numbers. According to them, Aitana now earns over €3,000 a month, and in some cases, more than €10,000, thanks to growing demand from brands both in Spain, where *The Clueless* is based, and internationally. For many of those brands, especially those looking to reach younger audiences in new ways, AI-generated influencers like Aitana aren’t just a novelty, they’re delivering results.



**IF AN AI-GENERATED INFLUENCER IS CONSISTENT, MEANINGFUL, EMOTIONALLY RESONANT—DOES IT MATTER THAT THEY WERE MANUFACTURED?**



All images: Aitana Lopez



Image created with AI

Beyond the obvious cost and convenience, Cruz and Núñez point to media impact. For instance, in one campaign for a haircare brand, Aitana's content doubled the average engagement rate on Instagram. In another, her post became one of the most-viewed on a sustainable fashion brand's profile.

## THE LEGAL GREY ZONE

As brands increasingly experiment with AI-generated influencers, the regulatory landscape around them is becoming harder to ignore. The technology is evolving fast but the rules that govern advertising haven't kept up, leaving brands and platforms to operate in murky grey areas.

Take Meta. The platform now requires users to disclose when content includes photorealistic video or realistic-sounding audio generated or altered by AI, with potential penalties for non-compliance. But the actual implementation feels vague. When an AI label appears on Instagram, the info popup reads: "[username] added an AI label to this content. AI may have been used for a wide range of purposes, from photo retouching to generating entirely new content."

It's a broad brush, one that offers little clarity. There's no distinction between a lightly edited image and a fully AI-generated avatar, leaving users unsure how to interpret what they're seeing. And while Meta has said its approach will "evolve as people's expectations and the technology evolve," the current system does little to offer meaningful transparency.

While there is undoubtedly an urgent need for regulations to evolve with the fast pace of technology, regulators are drawing on existing frameworks to address the current landscape surrounding AI in advertising. In the U.S., the Federal Trade Commission (FTC) is already applying long-standing advertising laws to AI-generated content. In September 2024, the agency launched [\*Operation AI Comply\*](#), bringing five enforcement actions against companies for allegedly deceptive behaviour rooted in AI technology. These cases were all based on existing Truth in Advertising rules that the FTC has been applying for decades. As William Lawrence, counsel at Venable LLP, explains, "there is no AI exemption from the laws on the books", quoting FTC Chair Lina Khan, highlighting that the rules regarding remaining truthful and accurate in any representation to consumers have not changed.



## WHAT ONCE FELT LIKE A SPECULATIVE EXPERIMENT IS NOW A COMMERCIAL REALITY



All images created with AI

“While specific regulations may lag behind technologies, regulators are much quicker in adapting to using old laws to attack what they perceive as new bad behaviour”, he noted. For example, when asked what happens if an AI-generated influencer is scripted to give a product recommendation, Lawrence pointed to existing FTC guidelines: “The FTC has pretty detailed guidelines on what makes an endorsement misleading from the perspective of the FTC. That guidance is clear that when an advertisement represents that the endorser has used the product, the endorser must have been a bona fide user at the time the endorsement was given”, noting that “AI or not, brands should be very careful to be truthful and not misleading”.

All of this underscores just how sensitive the space around AI-generated influencers really is, especially when it comes to product claims. If they can’t physically use or experience a product, can they ever count as a bona fide user under current regulations? That raises a broader question: are AI-generated influencers effectively limited to promoting surface-level aesthetics, while anything tied to performance, credibility, or wellbeing remains out of reach?

### WHERE DOES THAT LEAVE US?

As brands continue to explore the potential of AI-generated influencers and content, fashion is reaching a critical inflection point. What once felt like a speculative experiment is now a commercial reality, where long-held ideas about authenticity are being questioned and redefined.

For some brands, the cost-efficiency of AI is too compelling to ignore. For others, the ethical and legal uncertainties are enough to slow adoption. Those selling pure aesthetics may find smoother ground, while brands dealing in credibility or health claims face far more complex terrain.

And as content becomes increasingly AI-generated and automated, the core question becomes harder to avoid: who are consumers actually listening to, a real person, a persona, or just a prompt?

# AI IN PRACTICE

HOW MENSWEAR BRAND PERRY ELLIS REFINED A STRUCTURED, SMART, AND SENSITIVE ROLL-OUT OF AI.



*Perry Ellis International*



**INTERVIEWEE:**  
**Isaac Korn**  
Sr. Director Innovation  
Perry Ellis International

As Senior Director of Innovation at Perry Ellis International, Isaac Korn is a recognized leader in strategic innovation and technology adoption. He possesses deep expertise in product management, AI integration, and emerging tech deployment within the fashion industry, consistently driving enterprise-wide digital transformation. Isaac is known for his ability to create and scale impactful innovation programs, manage key strategic partnerships, and translate complex technologies into powerful business outcomes, with a keen focus on the ethical and strategic use of AI.



*AI is a polarising topic in society at large, but it's also quickly becoming a pivotal part of the way the world is going to interact with software, perform work, and experience and shape culture. Fashion brands the world over are microcosms for this evolving frontier where possibility meets real people. As an early adopter of AI, Perry Ellis has learnt from experience how concrete results come from responsible innovation.*

***The Interline: What was the first real moment AI entered the conversation at Perry Ellis?***

Isaac Korn: At Perry Ellis, we strive to be at the forefront of technology. We've been early adopters of AI, utilizing AI tools long before it became a mainstream trend. AI has been a topic of discussion within our company for quite some time. What truly propelled AI into the spotlight was the widespread introduction of Generative AI (Gen AI) to the general public. Since the launch of ChatGPT in late November 2022, the AI conversation has broadened from just the IT team to a company wide dialogue. Our management and executive teams have always supported our initiative to adopt new technologies early on, and they recognized the significance of AI very quickly.

***When that "permission" to use AI was given, what happened next, and what didn't?***

We made a conscious decision to avoid an immediate, unrestricted rollout of AI. We took a careful and planned approach to rolling out artificial intelligence. As a company, we prioritize a deep understanding of emerging technologies. Our Information Security team recognized early on the potential risks, especially to our intellectual property, of freely providing AI access to all users. Therefore, we first established safeguards and collaborated with Legal to develop a company wide AI Governance Policy. This policy makes sure AI helps us work better and serves our customers well, all while staying within our security and legal rules. To effectively use AI technologies, we provided associates with training on ethical use, data management, and risk assessment of our approved AI tools. Basically, we made sure AI was introduced into the company in a smart and safe way.

***What kinds of AI use cases emerged naturally, and what did they teach you about where the value actually is?***

Many use cases emerged naturally, especially those that improved creative workflows, streamlined operations, or even just helped someone get home earlier by automating tedious tasks. For example, we saw designers using AI for mood board generation and initial concepting, which really sped up the creative process. In marketing, AI helped with content generation for social media and even with initial drafts of product descriptions. These experiments taught us that the real value of AI at Perry Ellis lies in augmenting our existing processes and



*All images Perry Ellis International*

empowering our teams to be more efficient and creative. We also saw some things fizzle out – often tools that were overly complex or didn't directly address a clear need.

***How did employees figure out what to do with AI and what support did they need (or not need)?***

Our approach to AI adoption was very deliberate. It wasn't a free-for-all; we understood that a structured approach was essential for AI to be truly beneficial and safely integrated. The first crucial step was establishing clear boundaries through our AI Governance Policy, outlining what's allowed and, just as importantly, what's not.

To ensure our teams felt confident and supported, we implemented a structured training program for all employees who would be directly using AI tools or making decisions based on AI-generated data. We worked closely with them to understand their workflows and identify areas where AI could make the biggest difference, prioritizing those. Our training focused on understanding AI's capabilities and limitations, ethical use and compliance, data handling best practices (stressing that only public and non-sensitive information should be uploaded), and identifying and managing risks. This foundational support, with clear guardrails and training, was key to minimizing missteps and fostering confident, responsible AI adoption.

***What kinds of checks and balances emerged as AI use matured?***

As our use of AI matured, several important checks and balances naturally came into play, all driven by our commitment to using AI responsibly. Our AI Governance Policy is the bedrock of this; any AI tool needs explicit approval from our dedicated AI Governance Team, which helps us avoid security and compliance issues. The policy also clearly states that AI can't make critical decisions autonomously, especially when there are significant ethical, legal, or personal impacts. Our AI Governance Team, which includes our CIO and CISO, is continuously reviewing and supporting approved tools, ensuring they remain secure and up-to-date. These measures ensure our AI journey is not only innovative but also responsible, secure, and aligned with our company values.

***How do you think about the moving cultural frontier?***

AI is absolutely as much of a cultural transformation as it is a technological one, and we've experienced both aspects as this cultural frontier evolves. We're constantly tuned into this "moving cultural frontier" of AI, knowing that both technology and societal norms are changing rapidly. Our approach emphasizes being adaptable and continuously learning. We also cultivate a culture of responsible innovation, meaning we encourage exploring AI's potential while always prioritizing ethical considerations and compliance.



*All images Perry Ellis International*



On the consumer side, we're very aware of how our customers feel about AI. We're extremely careful about transparency and authenticity in anything facing the consumer. Internally, with our creative, technical, and commercial teams, it's about navigating the perception of automation versus augmentation. We've focused on communicating that AI is here to enhance their abilities, not replace them, and to free them up for more strategic and creative work.

***In 2025, how do you measure what "successful" AI adoption looks like at Perry Ellis?***

This year, there's definitely been a shift from pure experimentation to focusing on concrete results. For us, successful AI adoption looks like a combination of boosted productivity, enhanced creativity, and significant time savings. While we always consider cost efficiency, our main goal has been to empower our teams. We're tracking things like how much time is saved on specific tasks, the sheer volume of creative ideas generated, and positive feedback from employees about how AI is improving their daily work. These feedback loops are vital for sharing our success stories internally and demonstrating the real value AI brings. Ultimately, successful AI adoption for us means measurable business improvements, a confident and engaged workforce, and a strong, adaptable governance framework.

***What have been some of the hard lessons or growing pains of adopting AI in a people-first way?***

One of the hard lessons has been managing expectations. The AI landscape changes daily, and we're also learning to identify potential dead ends. What didn't work as expected was sometimes assuming that a new tool would be immediately intuitive or that every team would embrace it at the same speed. We learned that even with a people-first approach, consistent communication, ongoing support, and showcasing successful internal use cases are absolutely crucial. It also taught us the importance of truly understanding our teams' unique needs rather than trying to force a one-size-fits-all solution.

***What does the next phase of AI look like for Perry Ellis, and what are you watching closely?***

Now in 2025, the next chapter for AI at Perry Ellis involves exploring more structured integrations and potentially using intelligent agents to automate more complex workflows. We're still fully committed to our people-first adoption and experimentation approach, as that's where we've seen the most organic success. The goal we're working towards is a seamlessly integrated AI ecosystem that truly amplifies human potential across all areas of our fashion business—from design and production to marketing and retail. To get there, we need continued technological advancements, but more importantly, a sustained cultural embrace of AI as a partner in innovation. We're closely watching how AI model capabilities evolve, how the wider industry addresses ethical considerations, and, most excitingly, how our own teams continue to discover new ways to leverage AI to push the boundaries of creativity and efficiency in fashion.



All images Perry Ellis International

# AUTHORSHIP IN THE AGE OF AUTOMATION

AS AI RESHAPES BRAND TOOLKITS AND VOICES, CONTENT OWNERSHIP, TASTE, AND CREATIVE DIRECTION ARE BECOMING EVEN MORE VITAL.



DAN BUTT,  
BRANDING & OPERATIONS,  
THE INTERLINE

Dan oversees branding and operations at The Interline, including both core fashion technology initiatives and expansion into new markets.



AI is everywhere in fashion right now - I know, hardly a ground breaking statement - but the most significant turn isn't in design or distribution. It's in the voice. The story. Behind every "message from the brand" is a growing suspicion: did a human create this touchpoint, or a tool pretending to sound like one?

Forget AI influencers and forecasting engines. This is more intimate, and potentially more problematic. Across industries, it's a quiet rewiring of how brands talk and at what speed and volume - raising the question of when voice becomes noise. This is not because AI is incapable, far from it, it's more broadly capable, with greater overhang, than many people want to admit - but because too many brands, both in fashion and outside it, are letting AI do the talking, confusion could start to reign when it comes to understanding what's actually being said.

Here's the question no one seems to want to ask out loud: If every brand has the same AI tools and models, what makes an individual company's message worth listening to?

We're already right in the middle of the new normal of automated creativity. AI is no longer sitting in the wings: it's writing headlines, crafting CTAs, and creating visuals. The prompt is the new pitch. Midjourney instead of moodboards. ChatGPT in place of a copy deck. In a very compressed window of time, AI has become an essential part of the communications toolkit.

[Etro's 2024 campaign](#), developed in part with prompt designer Silvia Badalotti, marked an early case study in how these tools can be used deliberately, and in a way that draws attention to their artificiality. It's extremely important to stress, these high fashion, style driven campaign images did not happen by accident. This was an intentional embrace of a new tool, with the aim of targeting "infinite possibilities". The end results look quaint now, technically-speaking, but artistically there's still something there that provokes, challenges, and asks how brand campaigns and technology should intersect.

That principle - laying down creative intent before choosing a tool - is going to remain essential for understanding how fashion should be approaching AI authorship of creative content. It sounds simple enough, but that clear-cut definition could become worryingly fluid as teams lean more and more into automated creativity. The toolset isn't the issue when we look at a near-term horizon where AI is the first step in the content pipeline - it's the potential impact this could have on critical creative direction, and the possibility of so-called "voice drift," where even technically correct and superficially on-brand content starts to trend towards sameness and a vacancy of meaning. Think about it like this: AI systems post-trained on past communications can reliably reproduce a brand's tone, often with 90% fidelity. But reliability isn't the same as resonance, and replication is not synonymous with a consistent exercise of taste over





time. Content, approached this way, runs the risk of becoming a linguistic photocopy, each iteration slightly less distinct than the last, and because the metrics often remain steady, no one raises the alarm. And this applies not just to written copy, but to visual content, stylistic elements, and other pieces of the puzzle that AI can potentially take over.

In this context, a new kind of creative role is emerging. Not traditional copywriters or designers, but AI-wrangers, prompt engineers, and brand technologists. Their job isn't to originate every word or image, but to manage systems that do, albeit carefully, selectively, and with intent. AI gives you quantity with the simplest of ease, Humans, however, give you judgement and taste, often earned from years of experience. This is not lesser work. It is the editorial and creative direction backbone of future facing brand teams. Selecting, shaping, and refining output into something with integrity. The creative task moves from authorship to discernment, knowing what to keep and what to discard, and that discernment is most powerful when it has a name, a face, a human origin.

Despite the rapid automation of brand storytelling, some of the most resonant brands in fashion and beauty right now are the ones with a person behind the curtain. The influencer founder has a very public face, and with it a voice you can trace down to their latest social media post.

Think of Fenty Beauty, the Rihanna founded beauty company that specialises in inclusive makeup shades. It doesn't just sound like Rihanna, it very much is Rihanna. From tone to casting to campaign language, the brand is steeped in her world view: confident, inclusive, but crucially "unbothered" and real. One of the most iconic Fenty moments wasn't even a campaign at all - it was a comment. In 2017, when Make Up For Ever tried to 'throw shade' at Fenty's then-just-launched 40-shade foundation line by posting "40 shades is nothing new to us," Rihanna didn't wait for a PR team to craft a response. She wrote three words: "lol. Still ashy."

That comment wasn't just viral, it was authentic branding. It said everything about Fenty's tone of voice: sharp, real, culturally fluent, and unwilling to let old-guard beauty companies, often with manufactured faux edgy voices of their own, rewrite the narrative. That wasn't a post approved by a marketing team, or that might in today's operations be threaded through AI. It was the founder stepping in, in her own voice, in real time, and the message landed because it was hers.

The same principle applies to Skims. Kim Kardashian doesn't just model the shapewear, she also models the brand's presence. The visual minimalism, the hyper focus on fit and form - these aren't just aesthetic decisions, they're extensions of her. But the clearest example of authorship didn't come from the Skims handle, it came from her personal account. When the brand launched its maternity shapewear line and was met with criticism for promoting unrealistic body standards, it wasn't a corporate statement or campaign that clarified the brand's position. It was Kardashian herself. She posted directly to her stories and X (then Twitter), explaining that the product was made for comfort and support, based on real requests from pregnant women, including herself. It was unflirted, reactive, grounded in lived experience, and all the more effective because of it.

For brands like Fenty or Skims, the founder's voice often leads, not follows, the brand. The official account is often left to play catch-up. The real voice - the one that sets the tone, defines the stance, creates the moment - comes first through the founder's personal channel. That's how close the authorship is, and it works not because the founder has followers (though it helps), but because they have perspective. Their voice isn't shaped to fit the brand, the brand is shaped around their voice. Like Rihanna, Kardashian didn't delegate the defence of her brand to an agency or templated statement. She spoke, and the message stuck because it was hers. That's the point: when Rihanna and Kim Kardashian speak through their personal accounts, what they're really doing is collapsing the gap between brand and human. They're not hiding behind corporate language. They are the brand voice. And that's exactly what's at risk. Because in a world where AI tools can now automate tone, generate copy, even simulate style with 90% accuracy, it's that remaining 10%, the part that feels lived in, and personally claimed, that's everything. It's where the difference lives. AI tools can generate on-brand messages, but they can't generate ownership. They can't choose to speak for a company in pivotal moments, only a person can.

And yet, AI remains the most powerful creative tool of a generation, and on that point, it's important to separate critique from rejection. AI, used well, is not the death of creativity. It's a lever for creative expansion. Used thoughtfully, AI becomes a tool of amplification, not replacement. It allows brands to test more ideas, reach more audiences, and refine their message faster than before. The key, as always, is not the technology itself, but the intention behind its use. When paired with strong editorial judgement and a clear point of view, AI has the potential to enhance, rather than dilute a brand's narrative identity.



Let's be honest about what's at stake. This isn't just a story about tools, or automation, or efficiency. This is about the erosion of expressive identity in brand communication, and the cultural cost of letting machines optimise what used to be authored. AI at its best expands creative potential. It makes things faster, but it doesn't make them truer. The real value of a brand has never been how quickly it can ship content. It's in what it chooses to say. How it chooses to say it, and what it's willing to protect when speed and sameness start to look like success.

Ultimately, we all need to remember what branding is: the sum total of choices that make a company recognisable, memorable, and, at its best, felt.

When those choices are almost fully outsourced, swallowed by efficiency, the brand ceases to be a voice and instead becomes an echo. The way forward isn't to reject AI, neither is it to worship it. It's to define its limits. Use it to assist, not to replace. To test, not template. Because when tools are universal, the difference will always come down to taste. Not just aesthetic taste, but narrative discipline. Clarity of voice. Confidence in perspective.



# WHAT IF IT ALL WORKS OUT JUST FINE ?

AI IS PLAGUED BY DISTRUST, SURROUNDED BY DATA OWNERSHIP QUAGMIRES, AND ACCUSED OF OUT-OF-CONTROL HYPE. BUT IF THE PROBLEMS ARE PALPABLE, SO ARE THE POSSIBILITIES FOR RADICAL REINVENTION. SO WHAT MIGHT FASHION LOOK LIKE IF THEY ALL CAME TRUE?



**Barry McGeough**  
Group Vice President of  
Innovation & Strategy  
**AmeriCo Group**

Barry McGeough has a storied career in the footwear, apparel, and tech sectors delivering innovation led product for some of the world's largest verticals - from VF to PVH, Pentland to Google, driving exponential brand growth for some of the worlds most iconic brands like The North Face, Speedo, Merrell, Saucony, Calvin Klein, Tommy Hilfiger, Wolverine Worldwide and, most recently, AmeriCo. Group.

## “WE ARE ALL DREAMERS ...PERFECT DREAMERS.”

When it comes to technology, regardless of the consequences, we humans are inexorably drawn to optimism, and we have been consistently proven right to follow our intuition to invent, embrace innovation, and invent again. Using our ability to imagine dystopias (often more than our systems of governance and regulation) as guardrails, technology has, so far, always delivered outcomes that extend the quantity and quality of human life if we judge them on a sufficiently long timeline.

Take, for example, the Cotton Gin. Invented in 1793, The cotton gin used a combination of wire teeth on a rotating cylinder and a grate or screen to pull the cleaned cotton fibers through. This was pure mechanical innovation, and it significantly increased the speed and efficiency of cotton processing. This had a major impact on the cotton industry, particularly in the Southern states, where cotton was a major, labor intensive crop. It made it cheaper and easier to use cotton in mills in the short term, and it led to the proliferation of cotton and cotton-rich products in the longer run.

At the time, its commercial use also forced huge percentages of the labor force out of work. In the face of this radically disruptive technology, the cotton gin's inventor, Eli Whitney, wrote this to his father: "One man and a horse will do more than fifty men with the old machines... T'is generally said by those who know anything about it, that I shall make a Fortune by it." And indeed, fortunes were made. And the potential catastrophic implications to the incumbent state were far overshadowed by the entire industry that was born from this simple invention that fueled regional growth for over a century. (That growth, it must be pointed out, was also tied to the specter of slavery, which was only abolished in the United States towards the end of that period.)

And so that march of technological optimization of human capability and capacity continues into this century. Andrew Ng, who was a founder of Google Brain, and is currently an Amazon Board, member recently said something that echoed from one revolutionary period to another. "Just as the Industrial Revolution freed up a lot of humanity from physical drudgery, I think AI has the potential to free up humanity from a lot of the mental drudgery".



These parallels aren't just an academic exercise. Knowledge work has become the predominant form of human endeavor in many markets (not all), and there is a very real sentiment amongst the biggest proponents of AI that augmenting or automating at least part of that work is the next logical step in human progress.

From simple stone tools to complex genetic engineering and information technology, the history of technology is the history of the invention of tools and techniques by humans, which are then placed in human hands – often fewer hands than were needed before – and which, in turn, increase output, quality, creativity, and any number of other direct and indirect variables.

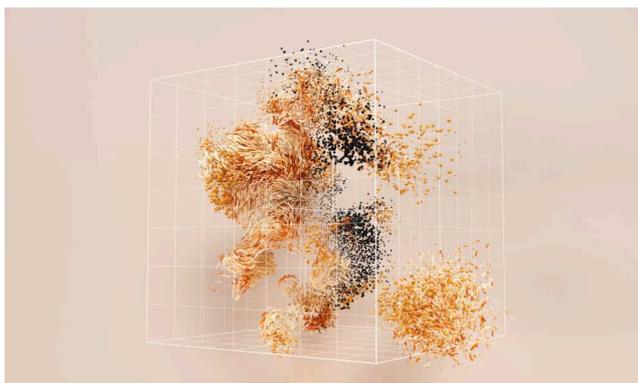
The speed at which the invention of these tools and technologies are being delivered is now becoming exponential. Technology begets technology at a quicker pace than any linear projection would have you believe. And as the application of machine learning and AI becomes the ubiquitous open source ingredient layer to everything, and is mutually accelerated by the arms race for processing speed where we measure success in petaflops (a quadrillion floating-point operations per second) and trillions of parameters (the internal, numerical values that LLMs learn during training to process and generate text), there is a possibility that we could see what OpenAI CEO Sam Altman describes as “[the takeoff](#)” towards the destination of machine superintelligence and digital intelligence “too cheap to meter”. Or abundance of capability and capacity for knowledge work, in other words.

As knowledge-seeking animals, this feels instinctively challenging and a bit confrontational, but the potential value of tools of this potential skill and this promised scale to increase our understanding of the world around, and solve some of our most pressing problems around the quality and quantity of life is as tempting as Pandora's box. A box which, while it contained all the evils of the world in short term, also contained hope in the longer run.

As Marc Andreessen said, “Technology is the glory of human ambition and achievement, the spearhead of progress, and the realization of our potential.” And while decades in the making, with this new computational prowess we are continually (it seems like it's happening daily now) seeing breathtaking exponential breakthroughs, new modalities, new ideas, and new inventions - perhaps none more exciting than in the field of biotechnology. From the first gene sequenced of a bacteriophage in 1977 to the success of the human genome project in 1990 the launch of Crispr Cas-9 in 2012, we now see the use of all our new compute power giving rise to the new discipline of Synthetic Biology where we can truly see what a condensed lens on all the practical application of the positive outcomes of AI could look like.

George Church, American geneticist, molecular engineer, chemist, serial entrepreneur, and pioneer in personal genomics is considered the father of Synthetic biology. That field, in its practical application, throws a tremendous amount of Math (synthetic data) at genomic sequences, treating biological components (like DNA, RNA, proteins) and systems the same way someone might treat engineering parts, devices, and circuits - applying engineering methodologies such as design, abstraction, standardization, and modularity to living organisms.

This matters to a wider range of fields, because DNA is our biological firmware, a specific set of instructions or microcode embedded within our genes to control its operation and function. Controlling this can revolutionize drug discovery, speed the development of new cell therapies and mRNA vaccines, accelerate the treatment of infectious diseases and cancer, be used to engineer crops that are more resilient to pests and diseases, produce biofuels and other chemicals in a more sustainable way, and promises to add more, better years to the human lifespan and the human experience.



**TECHNOLOGY BEGETS  
TECHNOLOGY AT A  
QUICKER PACE THAN  
ANY LINEAR  
PROJECTION WOULD  
HAVE YOU BELIEVE.**



One powerful example of how this is already being used is being pioneered by Andrew Adams at Eli Lilly and Company. In seeking treatment to the debilitating disease of Alzheimers researchers discovered the Christchurch Mutation: just one copy of the Christchurch variant conferred protection against Alzheimer's disease, even in individuals with genetic predispositions to the disease. Being able to apply Synthetic Biology to enhance, and deliver this modification would shift the field of Alzheimers from treatment to prevention.

More specifically for AI, we recently saw the open source release of Googles' Alphafold, their free AI Model to predict the structure of all of life's molecules. Following our hardware example, if DNA is our firmware, then Proteins are the Cookies that get left behind and tell the cells what to do. Proteins naturally fold into key like shapes that can only open very specific locks. Given that any given protein can theoretically adopt roughly  $10^{300}$  different configurations, it would take longer than the age of the universe for a protein to fold into every configuration available to it, even if it attempted millions of configurations per second. The fact that Google just gave away access to over 200 million proteins and provided a free AI tool for scientists to experiment with is in itself exponential.

So a lot of applications of AI in the creation of novel science, in narrow domains. But what about wider applicability? What does protein folding have to do with how the fashion industry might be feeling about AI?

Like a lot of academic initiatives, the outputs can seem interesting but arcane until the commercial sector takes those foundations and begins to build products or services that are visible to the layperson. We can see that happening with our biotechnology and genomics example with the transition from research to commercial application. Enter Colossal founder Ben Lamm, a protégé of George Church. A self described 'serial entrepreneur,' he started Colossal with \$15M in 2019 – the company is now worth \$10.2B - with the sole purpose of advancing the cause of de-extinction, using advanced gene editing technology to rebuild the DNA of lost megafauna and other creatures. With earth on track to lose between 30% and 50% of its biodiversity by 2050, maintaining this integrity is vital to life on earth. From seed banks and food security, to the known effects of trophic cascades (the establishment of apex predators that keep entire ecosystems thriving and in check) his work is mission-critical for anyone concerned with protecting biodiversity.



## IN PANDORA'S FABLE, HOPE NEVER LEFT THE BOX.

Colossal's most recent accomplishment, the birth of three dire wolves ( Romulus, Remus, and Khaleesi ) is considered "the world's first successfully de-extincted animal", the first of their kind to be alive in over 10,000 years. (There is some skepticism over that definition, and whether or not these animals would be better described a new variant of engineered contemporary wolf instead.) While Woolly Mammoths and Dodo Birds are also on their roadmap, the work at Colossal is not simply to create novel creatures for 21<sup>st</sup> century Jurassic Parks; instead it is about building the technological capabilities to stop the current waves of extinction in their tracks.

Colossal also seeks to use Synthetic Biology in other useful ways that help to demonstrate the pathway from narrow research to commercialization to specific and unpredictable new application. Take the establishment of their spin off company Breaking, which specializes in plastic degradation using synthetic biology having successfully edited the genes of an Amazonian microbe they call 'X-32', from a microbe that enjoys eating plastic to a microbe that is voracious for them, digesting polymers in weeks instead of decades or centuries and leaving behind carbon dioxide, water, and biomass.

This novel solution could swiftly help us address the problem of plastic pollution on our planet, and microplastics in our bodies, all with the enhanced use of data and compute. It's an invention with the potential to change how we think about what has, for decades, been an inextricable part of fashion's growth problem – and it originates from AI-supported research in a field that's orthogonal to fashion.

From synthetic data and synthetic biology naturally flows the idea of 'synthetic everything'. Synthetic Humans (Robots) Synthetic Media (Google VEO, Midjourney), Synthetic News and even Synthetic Truth. From the wellspring of AI we could easily see a flood of similarly seemingly-uncorrelated inventions, disruptions, and step changes. So much so that me

attempting to predict them here would be an exercise in blind guessing; it's impossible to say what will come about if AI ends up fulfilling its maximum potential.

That there are bad actors and bad intent, we are all clear on. And the need for us to be diligent and leery, especially in this current era, of dystopias of our own making, is real. Truth, identity, dignity, creativity – these are all core spaces of the human experience that we may need to reckon with sharing with non-human entities in the future.

Against that backdrop, the demand for the ethical human in the loop, capable of exercising taste and judgment, couldn't be more dire - and we must all remain diligent to these poor outcomes.

And that's more than just an idealistic call to action. Even today, in the US, there is legislation built into the 2026 budget bill that codifies a 10-year moratorium on state and local governments enforcing any law or regulation concerning AI models, AI systems, or automated decision systems. This would prevent states from enacting new AI regulations and also block the enforcement of existing ones – breaking down a framework I think any AI proponent would argue we clearly need if we're to design a new AI toolset, a new way of interacting with technology, and a new era of augmentation of human capabilities whose promises far outweigh its perils.

At this year's World Economic Forum in Davos, Andrew Ng, ever the tech optimist, was asked directly about the perils of AI and Artificial General Intelligence ( AGI ) and he replied "Do we think the world is better off with more intelligence? We use, primarily, human intelligence, now we have artificial intelligence. I think that intelligence, net net, tends to make societies wealthier, make people better off....intelligence can, in some cases, be used for nefarious purposes, but on average, I think it actually makes us all much better off".

In Pandora's fable, Hope never left the box.



# cotton can

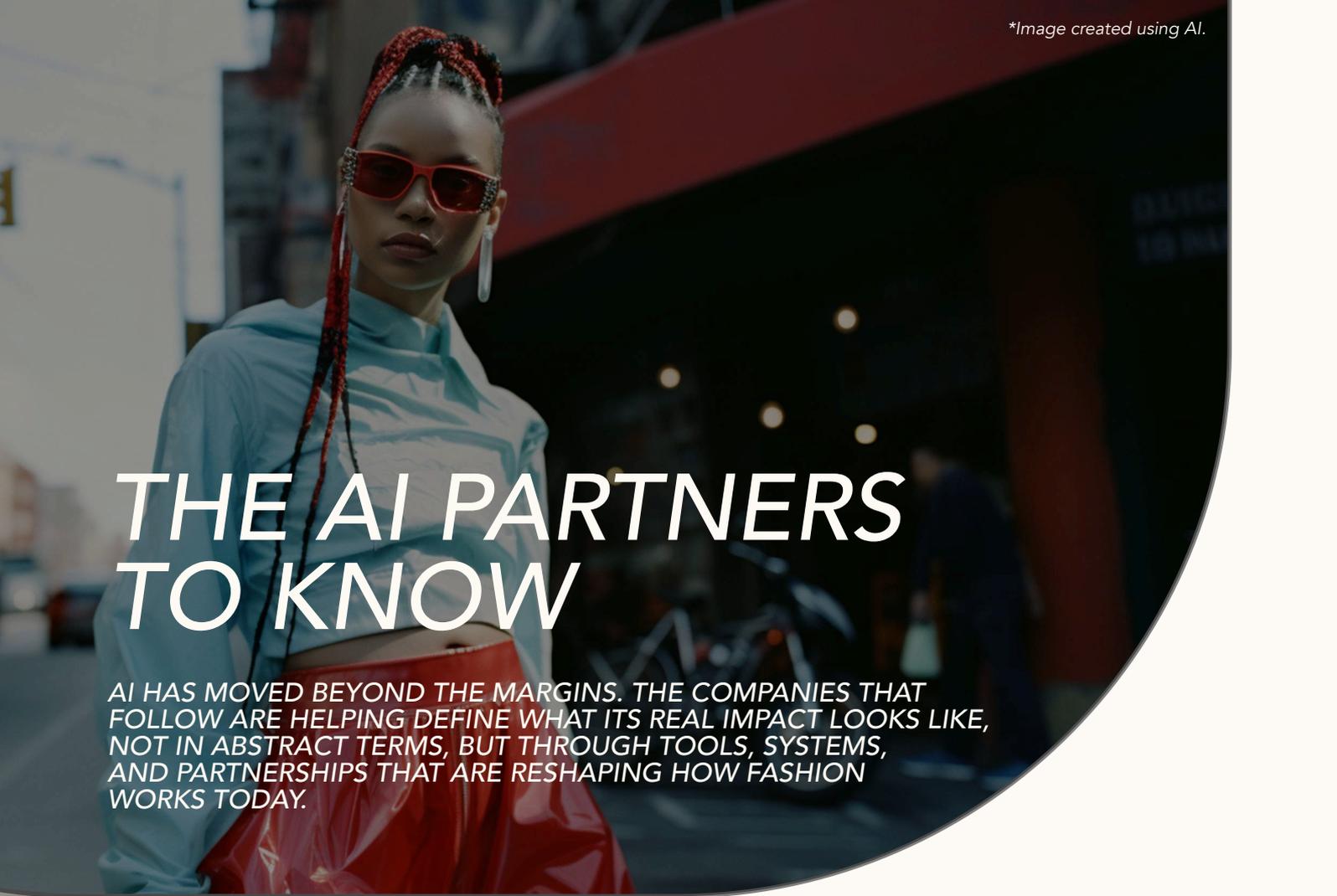
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# THE AI PARTNERS TO KNOW

AI HAS MOVED BEYOND THE MARGINS. THE COMPANIES THAT FOLLOW ARE HELPING DEFINE WHAT ITS REAL IMPACT LOOKS LIKE, NOT IN ABSTRACT TERMS, BUT THROUGH TOOLS, SYSTEMS, AND PARTNERSHIPS THAT ARE RESHAPING HOW FASHION WORKS TODAY.

2024 was a year of inflection. Generative AI captured attention, early stage tools began making their way into real business settings, and brands started to explore what this technology might mean for them. But under the surface, a more substantive shift was beginning to take root. The fashion industry, long balancing creativity with operational complexity, began to interrogate AI more seriously, not as a novelty, but as infrastructure.

As we move through 2025, the tone has changed. The initial swell of hype has given way to more grounded discussions around maturity, risk, return, and readiness. This year is less about pilot projects and more about strategic pathways. Where AI ceases to be a siloed initiative and starts to become embedded into the decision fabric of fashion businesses.

In many ways, the state of AI in 2025 is defined not by its potential, but by its pressure. The technology has advanced, and so have expectations. For professionals across the fashion value chain, the conversation has changed from asking what AI can do to what it is doing, and whether those outcomes are consistent, scalable,

and strategically meaningful. In other words, the benchmark has moved. It is no longer acceptable for AI deployments to merely demonstrate promise; they must now prove value.

Alongside this acceleration comes an unavoidable tension. Many organisations are still grappling with fundamental readiness - uneven data infrastructure, fragmented work flows, and a lack of internal alignment around AI's role. Against this backdrop, AI can appear simultaneously indispensable and out of reach. As a result, fashion professionals in 2025 are navigating a paradox: pressured to innovate, yet cautious about where to invest; convinced of AI's impotence, yet sceptical of many current implementations.

Despite all of this, it remains undeniable that AI now occupies a pivotal position in strategic decision-making across the fashion value chain, informing how fashion brands, retailers, manufacturers, and supply chain partners think about speed, creativity, efficiency, and value. But as more solutions reach market security, the task of separating marketing from measurable impact has never been more urgent.

That's why this section of the The Interline AI report exists. To help you, the decision makers, inside brands, retailers, manufacturers, and supply chain partners, cut through the noise and navigate a landscape that's grown both broader and deeper. AI is no longer just about generative content or sophisticated demos; it's about capability and competitive edge.

Building on our 2024 framework, the companies profiled here were asked to provide clear, comparable answers to the questions we now matter most when building or evolving AI strategy. Each vendor was asked:

- A plain language overview of their solution
- Headline customers using their AI features
- An indication of their active user base and adoption figures
- Their pricing model
- Technology integrations and AI-relevant partnerships

To understand how these technologies fit into fashion and beauty's near-term future, we also spoke directly with senior executives from each company and asked them to reflect on the state of AI adoption, not in vague industry terms, but through the lens of real enterprise use.

The vendors included here represent a mix of AI native startups, enterprise platforms layering in advanced AI, and service providers helping brands translate emerging capabilities into a real competitive edge. All of them have contributed to this report as sponsors, helping us keep it free to read.

We encourage you to explore their profiles, review their executive perspectives, and - where a solution speaks directly to your challenges - use the contact details provided to start a conversation.

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*Please note that the information contained in the vendor profiles that follow this page remains the property of the vendors themselves - each of whom is a paying sponsor of this report. While we endeavour to check the data we are given, The Interline does not assume responsibility for the authenticity of customer engagements, user figures, or technology partnerships listed in these profiles, and the contents of any advertisements provided to us are solely created by the advertiser.*



To find out more about a particular AI technology vendor or service provider, jump straight to their profile and executive interview using the links below.

As you explore the profiles and interviews that follow, we encourage you to take a wide-angle view of what AI means in fashion today. While generative tools remain a powerful part of the conversation, they now sit alongside, and often depend upon, more foundational forms of artificial intelligence that quietly power forecasting, search, recommendation, compliance, and creative optimisation.

In 2025, the most effective applications of AI are often the least visible. They are woven into core systems, integrated with day to day operations, and aligned with existing business priorities, not disruptive in the abstract, but transformative in practice. From machine learning models trained on production and sales data to AI enhanced user interfaces and planning systems, the category has become too broad, and too embedded, to treat as a single capability. As you assess each solution, consider not just what it does, but how, where and why it fits into the larger picture of fashion and beauty's next era of intelligence.



*Alvanon*

*Bamboo Rose*

*Browzwear*

*Centric Software*

*Graswald*

*Hyland*

*Kalypso*

*Lectra*

FOUNDED: **2001**

MyAlva by Alvanon is a next-generation, AI-powered platform that helps fashion brands reduce returns, improve product fit, and minimize waste by centralizing and activating consumer body data across the value chain. It's part of Alvanon's larger Sizing Intelligence Ecosystem—a suite of phygital tools designed to bring consistency and precision to apparel sizing.

With a legacy spanning over 25 years, Alvanon pioneered the development of physical and digital size standards used today by hundreds of leading athletic, luxury, and mass-market brands. Their work is grounded in real body data, including insights from millions of data sets worldwide. Alvanon revolutionized the industry with its AlvaForms (physical fit forms with one-to-one digital twins) and virtual avatars that enable accurate 3D product development and virtual fittings.

MyAlva builds on this foundation, offering a simple but powerful interface that captures individual body shape and size using parameters like height, weight, age, or body scanning. What sets it apart is how the data is shared across departments—product teams, merchandisers, and e-commerce leaders all gain access to actionable insights. The platform helps brands optimize size ranges, regional distributions, inventory planning, and product recommendations.

With over 53% of online fashion returns in 2023 attributed to poor sizing and fit (costing brands over \$150B), Alvanon offers a transformative solution; consistent size standards applied across the supply chain. Our tools are scalable, serving everyone from startups to global enterprises, empowering teams across the supply chain with the intelligence they need to make better decisions and deliver clothes that truly serve their consumer.

## Headline customers

<b>A&amp;F</b>	<b>DKNY</b>	<b>Patagonia</b>
<b>Adidas</b>	<b>Dries van Noten</b>	<b>Polo Ralph Lauren</b>
<b>Alexander Wang</b>	<b>Express</b>	<b>Prada</b>
<b>American Eagle</b>	<b>Eileen Fisher</b>	<b>Puma</b>
<b>Asics</b>	<b>Forever 21</b>	<b>Reebok</b>
<b>Bebe</b>	<b>Gap</b>	<b>REI</b>
<b>Bonobos</b>	<b>Guess</b>	<b>Target</b>
<b>Burberry</b>	<b>H&amp;M</b>	<b>Timberland</b>
<b>Brooks Brothers</b>	<b>Hugo Boss</b>	<b>The North Face</b>
<b>Boy Scouts of America</b>	<b>J.Crew</b>	<b>Under Armour</b>
<b>Carhartt</b>	<b>JC Penney</b>	<b>Urban Outfitters</b>
<b>Coach</b>	<b>Lacoste</b>	<b>Walmart</b>
<b>Chanel</b>	<b>Lucky Brands</b>	<b>Woolworths</b>
	<b>New Balance</b>	<i>+many more</i>

## Technology partnerships include:

**Browzwear**

**Gerber**

**Shima Seiki**

**Clo3D**

**Optitex**

**Style3D**

### What role do you see your application playing in the future of AI for fashion?

AI is already transforming the creative side of the fashion industry; but what about production? At Alvanon, we believe AI can also make a tangible difference by addressing long-standing operational inefficiencies that lead to waste, slow time to market, and high return rates. When applied consciously, AI tools combined with standardized sizing practices and shared access to accurate body data become a powerful enabler across the value chain. Our proprietary algorithms powering MyAlva and its analytics platform are designed to surface real-time body shape and size insights to all key stakeholders—product, merchandising, and eCommerce teams—enabling more accurate product development, smarter inventory planning, and improved sizing strategies. This translates to fewer returns, less waste, and better alignment between consumer needs and product offerings.

The industry is already seeing AI's impact in backend applications like automated pattern generation, material costing, and digital product development workflows become successful tools for transforming the way garments are made, increasing speed to market and reducing the need for iterative sampling. By building AI systems that are role-specific and user-friendly, Alvanon aims to create easy ensure adoption and effectiveness across the supply chain for organizations of all sizes. We see continued gains in the near term as adoption of tools like MyAlva grows, particularly among companies looking to improve efficiency and reduce returns. Longer term, Alvanon believes AI will be the core foundation to a more agile, data-based, and sustainable fashion ecosystem driven by consistent size standards.

**contact**

# MYALVA

alvanon  
SIZE MATTERS

SIZING INTELLIGENCE FOR BETTER BUSINESS.



**Product  
Development**



**eCommerce**



**Merchandising**



MyAlva unites teams from design to ecommerce with Alvanon's AI-powered sizing intelligence. Backed by 2+ million of data sets and 25+ years of insights, MyAlva helps reduce returns, optimize inventory, and cut waste — driving smarter decisions across the supply chain.



**FUTURE-PROOF  
YOUR SIZING**



**Jason Wang**  
**COO,**  
**Alvanon**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

I think we are well on our way. AI already surpasses humans in various tasks that are based on reiteration and reinforcement. Software development, for example, is a space where leveraging AI can produce a greater ROI by increasing efficiency and agility. Beyond generative imaging, AI is now being used to turn data into operational improvements, and that's where real business value starts to emerge.

***To be more specific about where that kind of quantifiable return might be found, it seems logical to look at where fashion is currently letting the most value escape, and to ask what AI can do about it. With returns from eCommerce now as high as 50% in some market segments, that seems like a strong target - but it's also one that technology providers have tried to hit from multiple different angles in the past. From a cultural and a technological perspective, why have return rates remained so stubbornly high? And what do you believe AI tools, based on a huge amount of body data, can do to reduce them?***

The main issue is that most companies still don't use consistent sizing standards. If your products aren't consistent, consumers can't trust what size will fit them, and that's the biggest reason for returns related to sizing and fit.

Returns unfortunately cannot be solved by simply applying some form of AI. If that was the case, then we would see much more success from the current solutions in the market, like sizing and fit recommendations and virtual fitting rooms.

The other reason why returns have remained high is simply due to the inherent lack of confidence that the consumer has in terms of the product sizing and fit and the ease of free return policies. Customers with low confidence

in a brand's sizing are buying multiple sizes in a single garment, and then returning the ones that don't fit. If companies solved their sizing inconsistency issues then, overtime, these types of hedged purchases will go away and consumers will exercise brand loyalty and increased conversion rates.

If companies adopt and execute sizing standards properly, then AI tools like virtual fitting rooms, and sizing and fit recommendation engines will work much more effectively than before and the industry will see much lower return rates. If those AI-powered tools are based on real human measurements, then even better.

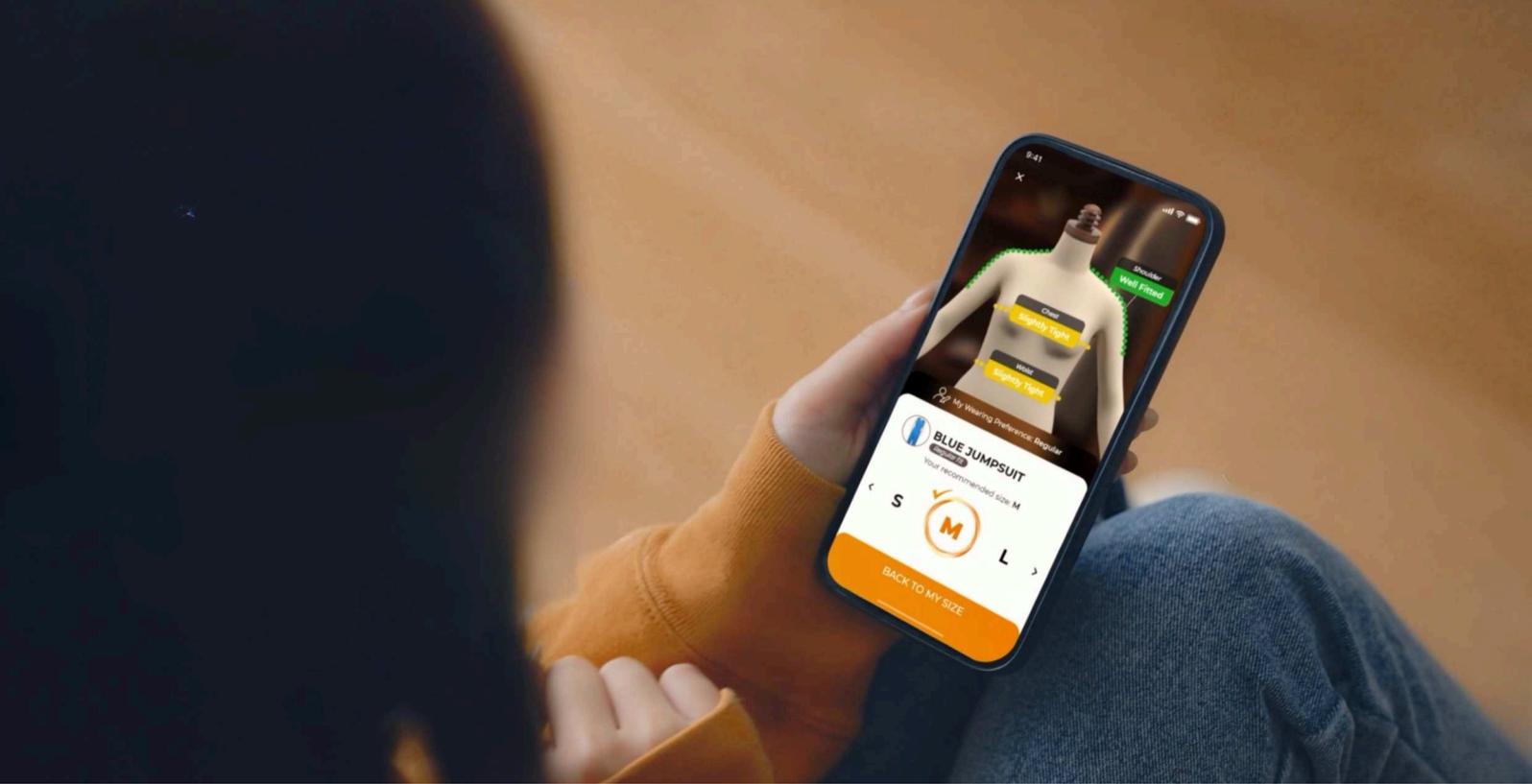
***Another area that a significant amount of value leaks out of the typical product lifecycle is waste. Whether it's iterative sampling and all the rework that creates, low materials utilisation, or a lack of standardisation in sizing, a lot happens upstream to determine how much waste is created in a single style's route to market. These are not the most outwardly-compelling use cases for AI when***

***compared to generative product photography, for example, but sourcing teams and their strategic partners are perhaps some of the best examples of end users who could benefit from AI. But what would that be like in practice to make a meaningful difference?***

Absolutely. While generative AI gets more attention, traditional machine learning is already making a big impact across the supply chain to great results.

Let's look at 3D product development, for example. It is proven to drastically reduce the number of physical samples, which cuts both costs and environmental waste created during the product development cycle. AI is also being integrated into these digital workflows through developments such as automated pattern generation, material costing, and usable digital twins that can create more efficiency and increase ROIs. These AI developments are underway at this moment and will have sizable contributions for increasing speed to market and reducing waste.





***The most effective way to avoid creating waste or incentivising returns is, of course, to bring the right products to market in the first place through intelligent merchandising, and then to pair them to the right consumer through smart inventory planning and product recommendations. This kind of forecasting and trend analysis has historically been primarily backwards-looking, based on retrospective market signals and prior performance, combined with intuition - and product recommendation engines have been notoriously rigid and deterministic. How do you see this changing thanks to platforms like MyAlva and the kind of real-time analytics you aim to provide on shopper preference, body data trends, and size-related frictions in the shopping experience?***

MyAlva is an AI tool that allows us to capture the consumers body shape and size based on several parameters – height, weight, age, through consumer input or scanning. While this tool is similar to other existing sizing finders, the difference is in the utilization of gathered data.

Traditionally, e-commerce, merchandising, and product teams don't share data effectively. Useful information that is gathered by ecommerce is not being transferred in meaningful ways across all teams.

That's where MyAlva changes the game, providing transparency of the gathered consumer body data to all parties.

Product teams can look at measurement data and body shape data to improve their product sizing and fit. Merchandizing teams can look at sizing distribution charts to better determine sizing allocation in different regions. They can also easily determine if there are opportunities for new size ranges and product categories based on what consumers are looking for. And ecommerce teams get stronger insights into consumer preferences and reduce size-related friction in the shopping experience.

MyAlva and its AI-powered insights provide another important data source for decision makers, when combined with existing data sources, like historical sales and returns data, competitor analysis, or trend forecasting, adds up to better product offerings and more accuracy in terms of sizing.

***We've talked about AI for very discrete use cases, but there's also a growing argument being made for layering it across as much of the value chain as possible, as a way to bridge different disciplines and to bring structure and smart decision-making to the full spectrum of product design, development, and retail. How are you approaching that angle? And do you see that kind of enterprise-level intelligence as being off-limits to smaller companies, or is it theoretically accessible to everyone?***

I touched upon this on the previous question, but to elaborate, AI is an enabler that should be used throughout the supply chain, bridging creative, technical, and manufacturing. It enables consistent decision-making and faster product development.

The important thing is that it is made useful for the different roles, so all teams can fully utilize the insights tools like MyAlva provide. Like the example above, a technical designer is going to want to dig into detailed body measurements to build patterns, while a buyer will want the AI simply to guide them on what sizes to buy while planning inventory. An intelligent system will be able to cater to both these demands, and this is the main differentiation point for MyAlva. We realize that AI doesn't make decisions in the company; it is the people. The AI is simply there to empower them. MyAlva is not an enterprise level system, it is a simple, powerful tool that can be used by startups or corporations.

**What do you believe are the next steps for how AI in general is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?**

I think that AI, in the near future, will be used primarily as backend enablers for specific tasks. For example, we are not going to see a Hollywood film created entirely by AI, but the film industry is certainly using generative AI to help them create frames and scenes for their movies during production.

While on the frontend in apparel we are going to see more virtual try-on AIs, I think that a lot of the AI integration will be happening in the backend. Design Ideation, product development automation, AI product image and video generation, and other tools will all be used to reduce costs, increase efficiency and speed to market.





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FOUNDED: 2001

Bamboo Rose delivers TotalPLM™, a next-generation, end-to-end retail management platform purpose-built to meet the unique challenges of the fashion and apparel industry. We empower global retailers and brands at every stage of the product journey, from planning and trend-driven design collaboration to product development, global sourcing, supplier management, purchase order execution, global trade management, and compliance.

At the core of TotalPLM is **AI-powered Decision Intelligence**, designed to optimize critical decisions across the product lifecycle and retail supply chain. Whether forecasting demand, managing suppliers, or optimizing buy plans and assortments, Bamboo Rose Decision Intelligence delivers explainable, data-driven recommendations that help drive stronger retail results and supply chain performance.

275,000+ Active users worldwide across the following regions:

70% North America

2% LATAM

15% EMEA

13% APAC

## Headline customers

Five Below  
American Eagle  
Outfitters  
Family Dollar

Kohl's  
Urban Outfitters  
Wakefern  
Walmart



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## 25+ Technology partnerships, including:

Converteo

DXC Technology

Ouidou

### What role do you see your application playing in the future of AI for fashion?

The fashion and apparel industry is navigating a perfect storm: demand uncertainty, rising tariffs, sourcing instability, and increasing pressure on margins and sustainability. In this environment, speed and accuracy in decision-making are more critical than ever.

AI—particularly Decision Intelligence—represents a fundamental shift. Instead of simply analyzing past performance, Bamboo Rose Decision Intelligence simulates future outcomes and recommends optimal actions across the retail supply chain. It enhances every stage of retail operations, from early cost prediction and AI-assisted design to automated tech pack generation, demand forecasting, inventory optimization, tariff classification, and more, making every decision faster, smarter, and more impactful.

Unlike standalone, narrowly focused AI tools, our Decision Intelligence is deeply embedded within TotalPLM™, supporting users across planning, product development, sourcing, buying, and global trade execution. This integrated approach ensures scalability, consistency, and measurable results across the entire value chain.

Over the next 12 to 24 months, AI will shift from an innovation discussion to a business necessity. Retail leaders who embrace Decision Intelligence now won't just build resilience—they'll unlock the automation, efficiency, and agility needed to thrive in a complex global market.

[contact](#)

# Drive Retail Results with AI-fueled Decision Intelligence

Empowering Smarter Decisions Across  
Planning, Design, and Distribution

- ▶ Cost prediction
- ▶ Demand forecasting
- ▶ AI-assisted design
- ▶ Automated tech pack generation
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- ▶ And much more

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SCHEDULE A MEETING



**Rupert Schiessl,  
Chief Strategy  
& AI Officer,  
Bamboo Rose**

**Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?**

If the curve were a runway, I'd say the wheels have lifted but the plane is still climbing through low clouds. 2023-24 proved that generative AI can imitate human output; 2025 is the year those models start to act on their own, collaboratively, moving from "answer engines" to true decision engines. In other words, we're crossing the line where the *logic layer* of software—those rigid rules and workflows we've coded for decades—becomes fluid, and even disposable. What remains as a long-term asset is high-quality, well-governed and secured data, because that's the fuel every AI agent will need to train its behavior and reason in context.

For retailers, that means a handful of concrete pilots (sourcing recommendation, dynamic markdown optimization, or automated PO creation) have already shown double-digit margin gains. Most companies, though, still treat these proofs as exotic add-ons rather than the start of a new, lasting operating model. So the ROI is real—but unevenly distributed.

**When we look at the full extent of the modern product lifecycle, there's a huge amount of information being created, but not necessarily having its full value extracted. This is a key problem that you're pointing the concept of "Decision Intelligence" at, so let's start from the foundations: what are the primary data sources that AI needs to draw from in order to support smarter decision-making, where does that data live today, and is the average organisation ready to apply AI to it?**

At Bamboo Rose, we usually group data into three concentric circles:

1. Core operational data—product hierarchies, vendor catalogs, cost sheets, purchase orders, receipts, etc. Most of this sits in PLM & Sourcing platforms like Bamboo Rose's TotalPLM suite.
2. Contextual data—sell-through, returns, stock positions, prices and promotions,... That's usually in merchandising, OMS, and POS systems.
3. External signals— weather, raw material prices, social sentiments, competitor prices, freight indices, change rates, TikTok trends,... These live outside the firewall of enterprise IT.

A decision-intelligence platform has to *unify* those three layers and keep them trustworthy. Technically, that means robust APIs, a semantic data organization, and clear data-ownership and security rules. We are at the very beginning of Decision Intelligence, thus, very few retailers have all three circles connected today; the good news is you don't need perfection to start—just a critical mass of clean, labelled events the agent can learn from.

***Walk us through what you see as some of the most potent use cases for Decision Intelligence. There's obviously a broad spectrum of choices that get made, in-house and in collaboration with upstream and downstream partners, to bring a successful product to market, and the background to those choices is changing faster than ever. Where do you see AI adding the most value?***

I would group the early winners into four verbs that in my opinion matter most to fashion retail: Sense, Shape, Commit, Protect.

- Sense future demand: multivariate forecasting that ingests regional preferences, weather, promotional events, etc. to propose highly accurate demand curves by style-color, location - allowing to get rid of manual buyer intuition.
- Shape assortments: generative mix optimisation that balances margin, novelty, and sustainability targets, then creates "what-if" line plans in minutes instead of weeks.
- Commit supply: autonomous PO agents that watch real-time sell-through and supplier capacity and trigger reorder quantities—or cancel dormant commitments—without waiting for a weekly meeting.
- Protect margin: intelligent markdown and promotion sequencing that treats every item like a tiny financial asset, learning the elasticity curve continuously instead of locking a promo calendar six months ahead.

Each of those use-cases touches partners upstream or downstream, so Decision Intelligence has to be collaborative by design, not a black-box stuck in silos.



***So far we've been talking about using AI to augment people's capability to make decisions, by equipping them with relevant, new insights. But while there's no doubt going to remain a set of decisions that companies agree should remain in the hands of human decision-makers, it seems inevitable that at least some of what we think of as important choices today could be automated in the near future. How do you define an AI agent, how should brands and retailers be thinking about which choices an agent could automate, and what does it look like to put that into practice?***

An AI agent is software with three extra muscles: it can *perceive* context, *reason* toward a goal, and then *act* through an API or UI—without a human prompt. Think of it as a junior colleague who never sleeps and keeps learning.

The litmus test for agent-worthy decisions is a 2x2: *impact* on the P&L vs. *variance* in the decision pattern. High impact + low behavioural variance (for example, safety-stock top-ups or freight mode selection) should be automated first.

High impact but high variance (for example theme-buy for next season) stays human-led with AI copiloting.

Practically, you combine an LLM-based reasoning core with a policy-engine ("never exceed credit-limit", "respect ethical-sourcing codes") and give the agent narrow, auditable permissions—start with "recommend + ask" before "recommend + do". That staged autonomy builds trust and delivers value within weeks, not quarters.

**Taking everything into account and looking to the longer-term horizon, it's clear that you don't see AI as a simple bolt-on to the existing technology ecosystem, but as potentially the start of a completely different model for information systems and the data that flows between them. How should readers be thinking about this shift from technology as a series of discrete applications to technology that's rearchitected around the different decisions that need to be made to optimise, for example, merchandising, product development, sourcing, and production processes?**

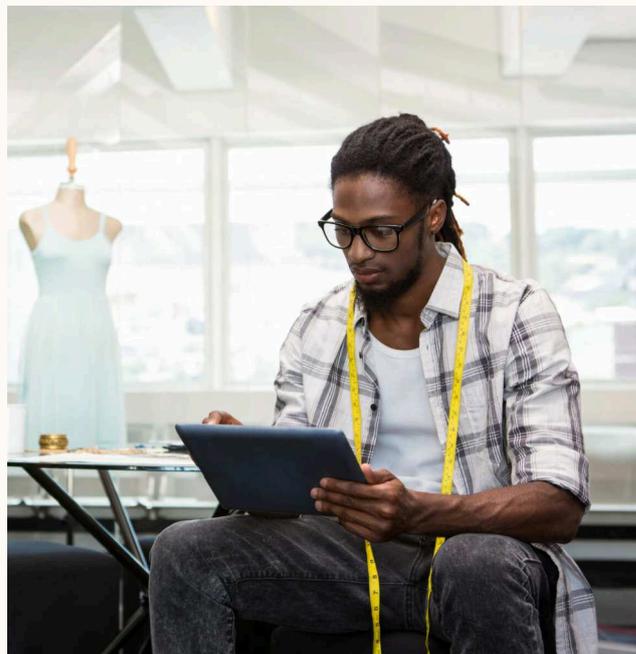
The mental shift is from apps to outcomes. Classic software captured screens and clicks; AI-native systems capture *intent* and orchestrate whatever micro-services deliver that intent. In this world, the only architectural constant is the *decision graph*—an explicit map of dependencies (for example “fabric MOQ affects lead-time which affects launch window which affects markdown risk”). These logic flows are generated on the fly, and soon will be interfaces; they become ephemeral UI slices that appear when the user or agent needs them and disappear afterward.

For a retailer this means:

- Break the monolith around functional silos—PLM, OMS, Allocation—and expose their data through decision APIs.
- Instrument every decision with feedback loops (did the supplier actually hit the new target cost? did the style sell at the expected velocity?).
- Let agent networks learn which chain of micro-decisions maximises value under real-time constraints.

It's a journey, but companies that treat their *decision catalogue* as the new enterprise architecture will out-learn the competition.

**What do you believe are the next steps for how AI is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?**



Both—sequentially. In the short term, conversational interfaces are the on-ramp; they lower cognitive friction and democratise data. Over time, as agents prove more and more reliable, they will recede into a “quiet yet indispensable” substrate—much like electricity or cloud computing today. Code is getting so cheap that we'll spin up disposable workflows, let them run a season, then archive them just like last season's mood-board.

What remains visible to the user is purpose-driven storytelling: “Here's what the agent did, here's why, here's the risk distribution.” That transparency is crucial, because humans still own accountability and intuition.

So expect a world where the *interface* is conversational, the *infrastructure* is largely invisible, and the *differentiator* is the retail brain trust that curates the right data and governs the agents ethically.



WWW.BROWZWEAR.COM

FOUNDED: 1999

Browzwear is a leading product development platform trusted by over 1,000 apparel companies worldwide. We provide end-to-end digital solutions that speed up time-to-market, drive customer satisfaction, and boost revenue.

Our advanced tools empower fashion brands to automate the creation of trusted virtual twins with precision, support seamless collaboration, and enable smart merchandising - all while **leveraging AI in a secure, thoughtful way to protect your digital assets.**

With our unique Open Approach, companies can easily connect Browzwear with the best-in-class software the fashion industry has to offer, tailoring workflows to fit their specific needs.

Together with our customers, partners, and employees, we're building a smarter, more connected fashion industry - one digital garment at a time.

## Headline customers

Bonprix	Otto
Columbia	Perry Ellis International
Jordache	Puma
Lidl	PVH
MAS Holdings	Target
Nike	Tendam
Nordstrom	The North Face
Odlo	Under Armour



WWW.BROWZWEAR.COM

FOUNDED: 1999

### User base :

Browzwear has a large and growing user base that includes a diverse range of businesses across various industries, from small enterprises to large corporations. Our software is trusted by users globally, with hundreds of active organizations relying on it each month.

### Technology partnerships include :

Lalaland: AI models

Siz Atomic: AI assisted pattern creation

Tronog/ecoshot: realistic models

### What role do you see your application playing in the future of AI for fashion?

We believe AI is transforming the way design concepts are generated - enabling the rapid creation of multiple styles and colorways in minutes. However, AI alone can't deliver a trusted fit or a product ready for manufacturing.

That's why at Browzwear, we're harnessing AI in a smart, responsible way - empowering apparel companies to get the best of both worlds: speed and creativity from AI, combined with the accuracy and reliability needed to develop first-time-right, manufacturable products.

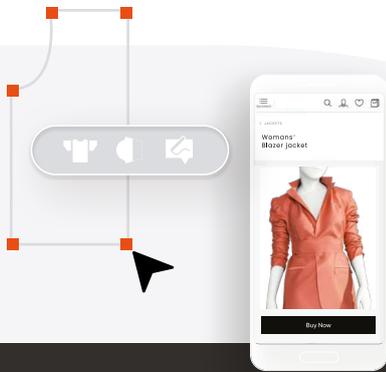
[contact](#)



# Real Value. Real Results.

Browzwear is trusted by the top apparel businesses to digitize product creation.

Browzwear is a leading product development platform trusted by over 1,000 apparel companies worldwide. We provide end-to-end digital solutions that speed up time-to-market, drive customer satisfaction, and boost revenue. Our advanced tools empower fashion brands to automate the creation of trusted virtual twins with precision, support seamless collaboration, and enable smart merchandising - all while leveraging AI in a secure, thoughtful way to protect your digital assets.



With our unique Open Approach, companies can easily connect Browzwear with the best-in-class software the fashion industry has to offer, tailoring workflows to fit their specific needs. Together with our customers, partners, and employees, we're building a smarter, more connected fashion industry - one digital garment at a time.

## Talk to Our Team Today to Find Out More

Born in the fashion industry, Browzwear has transformed tedious physical processes into efficient, collaborative digital workflows.



OTTO



Walmart\*



KOHL'S





**Craig Planson,  
Chief Revenue  
Officer,  
Browzwear**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

AI is currently best positioned to drive productivity where there are repetitive, mundane tasks. Today, there is still a lot of confusion about where AI has the most significant impact. Some simpler use cases with AIGC that are getting the fanfare are becoming quickly commoditized. The real AI impact will be found by truly increasing productivity and efficiency at the operational layer. The progression will be realized in phases, and organizations must have a plan.

***Since so many AI strategies have focused on the use of generative models to inspire and aid in design, we would expect these use cases to perhaps be the best-developed and the most mature. But right now it feels as though, whether it's for technical or cultural reasons, there's less alignment on the right approach, and fewer examples of best practices, than we might expect. What's your take on where AI should really be in the design process? Is there anything you believe the industry is overlooking, or framing incorrectly?***

The design ideation layer is clearly the first mover use case. The challenge is that the rapid development of ideas is creating a bottleneck for the product development phase. Change is driven by leading people through the process, clearly showing them what is in it, and having the right structure for success. The fastest starting point is to change the policy, build the process and tech around it, and address cultural resistance. We have found that having a north star is critical. A policy declaration around 95% first time right fit can shape the adoption and address the cultural resistance. Think about the time gained by avoiding 2 sample runs per style. This is more than chasing 'AI first'; it is about having a plan and trusted advisors to guide you on the path.

***Technology in general often treats "design" as a single unified discipline, rather than as two complementary workstreams: one focused on ideation and creation, and the other on more technical workflows. That also seems to be a risk where AI is concerned, with generative tools for inspiration becoming conflated with models and tools for the purposes of precision engineering. How important do you think it is to keep those use cases separate from both a technical and a cultural point of view?***

We really need to unify the efforts while maintaining the domain expertise. When everyone is working towards the same goal and understands the overall issues of the organization, real ROI is achieved, and the organization can separate itself from the pack. There is work to do in this area to bring down the silo's while maintaining integrity with the process. The industry has a bit of a practice of throwing their problems to another group or their vendors. This is why we need a North Star and KPI's that drive integrated outcomes.

***Even before the current AI boom, it's been a challenge in 3D strategies to maintain the association between high quality visualization and pattern-accurate simulation. As a result, we've all seen roadblocks emerge where some digital product creation pipelines and workflows have produced fantastic-looking content, but with that fidelity coming at the expense of producibility. Given some of the concerns that have plagued generative AI from an accuracy perspective over the last couple of years, this seems like it could***

***become a more significant problem where products start as AI generations, without the right grounding in reality. What do you see as the solution to this? What is it going to look like for brands and their partners to take advantage of the capabilities of AI, but in a way that's anchored into the realities of product development and production, so that what they end up with is a representation of a product they can trust is really manufacturable?***

Excellent question. It will be critical that the AI-generated visualization is turned into accurate patterns and designs on which decisions can be made. The product development and accuracy requirements can be addressed with assistance from AI. We believe that a trainable AI asset is critical. The data and reference images inform the automation. Garbage in and garbage out with assets that lack accuracy and integrity. When you train the models on assets with real measurements and the digital informs the physical, you can truly exploit AI. Ultimately, we must be able to reduce friction in converting ideation into producibility.



**When concerns about the utility or the legality of using big, general-purpose AI models, trained on a gigantic set of data that spans different industries, brands, and sources, come up, the answer is always “use your data instead”. Realistically, what does that actually look like? How can a brand approach the task of deploying AI for design and development purposes that’s properly grounded in their own knowledge, heritage, products, and so on? And how can they use that deployment approach to differentiate themselves from competitors who might have gone down the off-the-shelf model route?**

It is essential that you do not train AI models on the entire internet. There are many reasons, from unknown legal and ethical perspectives, to create a segregated instance that is not entangled with public reference images. While the segregated approach limits some AI training breadth, organizations can ensure they comply with brand philosophy and mitigate other risks, including protecting proprietary assets. When it comes to patterns and accurate virtual twins, the data and reference images need to be developed and certified for fit. This is a small language model approach that begins to enable automation of the accurate virtual twins, where

real gains are realized. I’ll go back to the north star of 95% first time right fit. When execution is simplified, the whole process improves.

**What do you believe are the next steps for how AI is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm, the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we’ve seen over the last couple of years? Or is it both?**

I would say it is a combination of both. Some use cases, like ideation, are clearly commoditized, and that will accelerate. We believe that accuracy and an open approach to platform integration are critical. Organizations need an environment where they can integrate with best-of-breed solutions without limitations. The more compelling use cases are realized in maintaining proprietary product assets in a secure environment and unifying the process. Overall, people who use AI to be more productive will be highly relevant and valuable assets in the marketplace. Use cases are accelerating, but key distinctions need to be understood and planned for.



Centric Software provides an innovative and AI-enabled product concept-to-commercialization platform for retailers, brands and manufacturers of all sizes. As experts in fashion, luxury, footwear, outdoor, home, cosmetics & personal care as well as multi-category retail, Centric Software delivers best-of-breed solutions to plan, design, develop, source, comply, buy, make, price, allocate, market, sell and replenish products.

- **Centric PLM™**, the leading PLM solution for fashion, outdoor, footwear and private label, optimizes product execution from ideation to development, sourcing and manufacture, realizing up to 50% improvement in productivity and a 60% decrease in time to market. Integrated with **Centric AI Fashion Inspiration™**, the solution uses generative AI trained on vast fashion datasets to accelerate design ideation with trend-aligned product concepts.
- **Centric Planning™** is an innovative, cloud-native, AI solution delivering end-to-end planning capabilities to maximize retail and wholesale business performance, including SKU optimization, resulting in an up to 110% increase in margins.
- **Centric Pricing & Inventory™** leverages AI to drive margins and boost revenues by up to 18% via price and inventory optimization from pre-season to in-season to season completion.
- **Centric Market Intelligence™** is an AI-driven platform delivering insights into consumer trends, competitor offers and pricing to boost competitiveness and get closer to the consumer, with an up to 12% increase in average initial price point.
- **Centric Visual Boards™** pivot actionable data in a visual-first orientation to ensure robust, consumer-right assortments and product offers, dramatically decreasing assortment development cycle time.
- **Centric PXM™**, AI-powered product experience management (PXM) encompasses Product Information Management (PIM), Digital Asset Management (DAM), content syndication and Digital Shelf Analytics (DSA) to optimize the product commercialization lifecycle resulting in a transformed brand experience. Increase sales channels, boost sell through and drive margins.

## Headline customers

Centric Software's AI-powered solutions are used by over 900 customers representing 18,800+ brands in the fashion, retail and consumer goods sectors.

Abercrombie & Fitch  
Arc'teryx  
Arena  
Ashley Stewart  
ASICS  
Bestseller  
Carhartt  
Crocs  
DIOR  
ECCO  
Everlane  
Fenix Outdoor  
Fila  
GANT

Golden Goose  
Guess  
Helly Hansen  
Hush  
KaDeWe  
Kiko Milano  
Kmart  
Lacoste  
LPP  
Lululemon  
LVMH  
Mango  
Mavi  
Neiman Marcus

Petit Bateau  
PVH  
Saint Laurent  
Sea to Summit  
Sephora  
Swarovski  
Revlon  
The Reformation  
Trespass  
Triumph  
Under Armour  
Volcom  
Wolf Lingerie  
Wolverine Worldwide



WWW.CENTRICSOFTWARE.COM

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FOUNDED: **2004**

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**Pricing model:**

*Centric Software offers a flexible, subscription-based pricing model designed to meet the needs of companies of all sizes and all business models. For small and mid-sized businesses, Centric provides cloud-based solutions available on a SaaS basis and implemented in just a few weeks, with plans starting from just 5 users.*

## Technology partnerships

Centric Software's AI-powered capabilities are supported by a modern, cloud-native technology stack built to scale with the evolving needs of the fashion and consumer goods industry. Centric Software leverages a range of leading platforms to support machine learning, real-time data processing and system-wide performance.

Centric Software also integrates with leading ecosystems such as **Microsoft, Adobe and Apple**, ensuring seamless user experiences across creative, productivity and mobile environments. Integration with leading 3D design tools supports advanced digital product development workflows.

As part of its AI model-agnostic strategy, Centric Software collaborates with top generative AI providers to maintain flexibility, integrate best-in-class models and accelerate innovation across its suite of AI-powered solutions.

Additionally, Centric Software and Contentserv maintain strategic partnerships with key players in PIM, DAM and PXM, enabling brands to deliver consistent and enriched product experiences across all digital and physical touchpoints.

*For more information about Centric Software's technology ecosystem, visit: <https://www.centricsoftware.com/partners/>*



[WWW.CENTRICSOFTWARE.COM](http://WWW.CENTRICSOFTWARE.COM)

FOUNDED: **2004**

## What role do you see your application playing in the future of AI for fashion?

Centric Software envisions artificial intelligence as a practical engine of change across the entire fashion product lifecycle. Rather than chasing hype, Centric Software takes a pragmatic approach, implementing AI only where it drives real impact on decision-making across every step of the end to end process from ideation to commercialization. AI is now woven from pre-season planning to post-season analysis, delivering measurable returns by improving profit margins, accelerating time-to-market and boosting productivity. Backed by decades of fashion expertise and a commitment to market-driven innovation, Centric Software ensures that all solutions and AI use cases are developed in close alignment with real-world business challenges, not theoretical models, avoiding one-size-fits-all algorithms in favor of targeted problem-solving.

Centric's extensive R&D and engineering teams are central to this mission, continuously enhancing AI-driven capabilities that are deeply embedded across its product ecosystem. Rather than treating AI as a surface-level add-on, Centric Software integrates it into the foundation of each solution, purpose built to reflect the real-world workflows of brands, retailers and manufacturers. To date, Centric Software has identified more than 100 distinct use cases that drive measurable improvements in business performance. A standout example is Centric AI Fashion Inspiration, a fashion-specific generative AI tool embedded directly with Centric PLM. Trained on over 1 billion curated fashion images across 800+ product categories and updated daily by crawling 1000+ global retailers, this solution empowers creative teams to accelerate ideation with on-trend, brand-aligned product concepts at scale. Another practical use case addresses tariff-related disruption: AI-powered capabilities within Centric PLM help brands rapidly model cost impacts, evaluate sourcing alternatives and adjust margins in real time, enabling more agile, informed responses to shifting trade policies.

The results are already being felt. Customers report significant ROI — up to a 60% reduction in time to market, 30% lower inventory levels and double-digit increases in revenue through data-driven pricing and assortment strategies. Yet Centric acknowledges that transformation is not instant. As CTO Ravi Rangan emphasizes, AI's full potential lies not in standalone automation, but in enabling strategic, scalable decision-making — a goal that demands more than technology alone. Real transformation, he notes, depends on visionary leadership, a culture of trust and a commitment to continuous learning and iteration.

contact



# AI That Delivers. Fashion That Performs.

From concept to consumers—powered by AI.

**100+ AI use cases.**  
**Market-driven.**  
**Measurably impactful.**

From ideation to inventory, Centric Software's AI-powered best-of-breed, integrated solutions accelerate creativity, boost margins and build agility.

**+18%**  
**Revenue Uplift**

From smarter in-season pricing and inventory decisions

**+110%**  
**Margin Increase**

From AI-optimized planning and rebalanced assortments

**+60%**  
**Faster Time to Market**

By streamlining design, sourcing and approvals

**Built for fashion.**  
**Driven by results.**

SEE IT IN  
ACTION



[www.centricsoftware.com](http://www.centricsoftware.com)





**Ravi Rangan,  
CEO,  
Centric  
Software**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

We are entering a phase where AI is no longer a speculative technology; grounded in proper guardrails it is becoming a practical, virtual companion that can demonstrably impact enterprise performance. At Centric Software, we are focused on embedding AI into real business processes, not treating it as a standalone phenomenon. Our strategy emphasizes AI agents that work within the structured, validated context of our customers' domain model through Centric's OOTB semantics comprising over 1,000 business objects, spanning PLM, planning, pricing, market intelligence, PIM and more.

The foundation for ROI lies in applying AI to real enterprise workflows, where AI augments rather than replaces human input. Our implementations — like automated BOM creation based on AI-generated designs, or predictive pricing recommendations — are driving efficiency and decision quality in measurable ways. We now support over 100 atomic AI use cases across the product lifecycle, illustrating the tangible progression from AI theory to enterprise value delivery.

***There's a temptation, across every sector, to look at AI right now as something of a magic wand - a solution to not just long-simmering business challenges, but also to fundamental technology problems like information fragmentation, siloed processes, and enterprise-wide data governance. It's clear that Centric sees a lot of possibility in the different kinds of AI - from generative inspiration to demand forecasting - being applied on top of existing systems and structures, so how important do you believe it is for organisations to have those systems and structures properly built to begin with? Can AI deliver value if it's layered on top of a disconnected technology estate?***

AI, without a strong digital foundation, is just noise. We've consistently found that the most impactful AI applications emerge when they are grounded in high-integrity, well-structured data and process environments. Our value at Centric Software lies in helping brands integrate AI into a unified architecture — spanning Centric PLM™, Planning™ and Pricing & Inventory™ and into Product Information Management, Digital Asset Management, Content Syndication and Digital Shelf Analytics (Centric PXM™) — where enterprise information semantics, processes and business rules are already codified and thereby augmenting task automation and decision support.

Within an enterprise context, AI must be layered on a cohesive model that captures the nuance of a business. For instance, similarity detection in pricing strategies is far more powerful when it includes functionally oriented data from PLM (attributes, materials) alongside market-driven pricing elasticity of demand. Fragmented tech stacks limit this capability. Our role is to unify silos, enabling decisions that draw from a complete and trusted dataset. Without that foundation, AI is likely to generate misleading or unexecutable or sub-optimal insights.

**When we think about where product information lives, and where processes refer to, we quickly arrive at the central tent of PLM: a single source of truth where core and extended product data lives, where vital decisions are made, and where other critical systems link back to. If AI is employed, in different forms, across a hypothetical brand's entire solution stack, how does the role of PLM change? And how does having the right PLM platform at the heart of an enterprise-wide AI strategy create new capabilities and new possibilities?**

PLM's role has evolved — from data management, to process orchestration, to collaborative business concurrency — and now, with AI, into decision support. When AI is integrated at the core of a modern PLM system, it enables dynamic, context-aware decision-making that reflects not only historical data but current trends, business rules and predictive insights within the fabric of a company's ethos.

Centric PLM is not just a repository; it's the operational backbone. By grounding AI agents in this domain model, we empower users to execute AI-assisted decisions that are fully compliant with corporate policies and process governance. For example, material recommendations can be validated against approved suppliers and sustainability targets within the PLM and dynamically integrated with World knowledge from LLM models augmented with search, minimizing risk while accelerating innovation. This isn't theoretical, we're seeing it in practice through projects with leading retailers automating design-to-BOM workflows with AI support. Navigating tariff complexity is a great example where AI can make a concrete impact.

**Obviously, the roll-out of AI is causing friction and uncertainty in creative communities - but it's also making uncomfortable waves throughout all the different roles and disciplines that contribute to the typical product journey. In general, professionals are concerned that automation means giving up control today and potentially losing their positions in the slightly longer term. This is a difficult foundation for any organisation to build a strategic, full-scale transformation on top of - but if we collectively believe that AI is going to help usher in that transformation, it's vital that different communities and end users are given the right grounding to understand its value and influence its direction. How do you believe we should be approaching this?**



The key is pragmatic transformation, not technological evangelism. We work with customers to ensure AI is introduced in a way that complements, not threatens, existing roles. Our strategy is anchored in a "human-in-the-loop" model, where AI augments user decisions, automates repeatable tasks, and brings new opportunities for creativity and value creation in consonance with prevalent compliance, traceability and accountability demands.

We also recognize the diffusion curve. We're not chasing AI hype but working to cross the adoption chasm with real, measurable improvements. This requires transparency, explainability and clear ROI. We advocate for governance models that reflect organizational ethos, because successful AI isn't just functional; it's cultural, and should improve our operations through continuous learning.

**With the right data foundations and the right culture and change management strategy in place, what specific use cases for AI do you see being the most powerful in the next 12-24 months? In a general sense, the vision is obviously for every different job role to be able to contribute to better product outcomes, real-time decision-making, and bottom-line performance, but more specifically how should the companies reading this report be prioritising their investments in AI across planning, pricing, design, content and other domains?**

In the near term, we anticipate that the biggest ROI will come from task automation and intelligent task complementarity, areas like AI-assisted assortment planning, predictive pricing, content generation and design simulation. We're seeing rapid uptake in use cases where AI acts as a co-pilot — accelerating processes like BOM creation, copywriting and trend-driven design — without removing human judgment.

From a prioritization standpoint, companies should start where they have the strongest data confidence. For many, that means PLM. A solid PLM backbone enables AI-powered planning and pricing decisions that reflect real product constraints, market data and customer behavior. Start with high-impact, low-risk domains and scale from there. Our customers have seen up to a 60% reduction in time to market and 15% increase in margins using this staged, grounded approach.

**What do you believe are the next steps for how AI is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?**

It's both. AI will become invisible infrastructure and a visible interface. We're already embedding agent-like capabilities that navigate workflows, assist in decision-making, and ensure compliance with business rules. These agents are not just chatbots, they are context-aware collaborators capable of executing tasks across Centric's applications based on voice or text input.

Simultaneously, AI is forming the backbone of new capabilities, like dynamic pricing optimization and market trend analysis. These are not flashy UI features, they're powerful engines operating behind the scenes. In that sense, AI is taking on the dual role of being both an interface and infrastructure, deeply embedded in the enterprise stack and reshaping how business happens at every layer.





WWW.GRASWALD.AI

FOUNDED: **2021**

Graswald AI helps fashion brands produce high-quality, on-brand product photography using artificial intelligence—removing the need for traditional photoshoots.

With Graswald AI, a single flat-lay image of a product can be turned into a wide variety of visuals. Teams can generate styled, on-model shots with custom Avatars (digital models) that reflect their brand identity, and pose and shoot these models in any way, against any background or lighting setup.

They can easily combine products to create styled looks for PDPs, or generate themed, marketing visuals for campaigns—all without a single photoshoot. This flexibility enables brands to easily localise content for different markets, adapt visuals for seasonal campaigns, or test different creative directions without additional cost. The result is a streamlined content pipeline that saves time, reduces costs, and improves consistency across all channels.

Whether for the online store, social media, or advertising campaigns, brands using Graswald AI can respond faster to market needs and maintain a strong visual identity at scale—without compromising on quality or control.

The ability to generate photorealistic images on demand supports faster product launches and more personalized marketing campaigns, such as targeting different regions or demographics with tailored visuals.

Graswald AI's approach reduces the need to ship samples back and forth or book international shoots, lowering both operational costs and environmental impact. This makes it especially useful for brands looking to modernise their content production while meeting sustainability goals.

Ultimately, Graswald AI is a practical tool for streamlining visual content creation in fashion. It gives teams more control over the creative process, shortens production timelines, and supports better performance in digital retail environments.

### **Pricing model:**

*Our pricing is an annual subscription paid monthly, based on the number of SKUs and other factors. We offer custom avatars, poses, and flexible Enterprise plans.*

## **Headline customers**

**havaianas**  
**J.Lindeberg**

**Mammut**  
**VAUDE**

## Technology partnerships

*Graswald AI is a standalone SaaS product. While we offer API integrations with customer suites, most clients use us standalone.*

*We do integrate easily with all major e-commerce platforms and offer custom integrations for our Enterprise customers.*

### What role do you see your application playing in the future of AI for fashion?

Creating high-quality product content has traditionally been both expensive and time-consuming. Fashion brands often face tight deadlines, complex logistics, and limited flexibility when organising photoshoots.

Coordinating models, photographers and studios, requires significant time & effort, and many teams struggle to maintain consistent, high-quality visuals across their entire product catalog. As a result, visual content creation becomes a bottleneck—slowing down product launches, limiting marketing efforts, and increasing costs.

Graswald AI offers a faster, more efficient alternative. By using advanced AI, it allows brands to generate photorealistic product imagery without needing traditional photoshoots. Brands can save up to 60% of their content production costs and create visuals within hours instead of weeks.

This dramatically reduces reliance on physical assets and complex production schedules. Instead of coordinating models, photographers, and studios, and physical samples, brands can generate publish-ready PDP & Marketing images digitally, from a single flat-lay shot of their product—, saving time, cost, and effort.

The platform allows users to create styled, on-model shots with full control over lighting, camera angles, poses, and model appearance. This flexibility makes it easier for brands to showcase a wide range of styles, sizes, and variations without having to reshoot products repeatedly. It also helps teams update product visuals quickly when collections change or new items are added.

For e-commerce, where visuals directly impact customer decisions, Graswald AI offers a consistent and scalable way to create endless, on-brand product photos at a fraction of the traditional cost & effort.

[contact](#)



Top



Jacket



Bottom



Clara



Pose IV\_Front



**Julius Harling,  
Founder & CEO,  
Graswald AI**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

We're seeing a shift away from relying on broad, general-purpose AI toward solutions that are purpose-built for specific, high-value workflows. In creative industries like fashion, generic tools only go so far — what teams need are systems designed around their actual production needs.

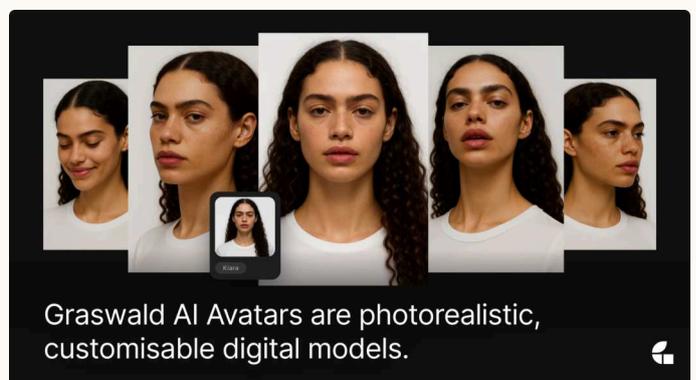
In image generation—particularly in fashion (which is what I've been focusing on)—we're seeing these models impact every stage of the value chain.

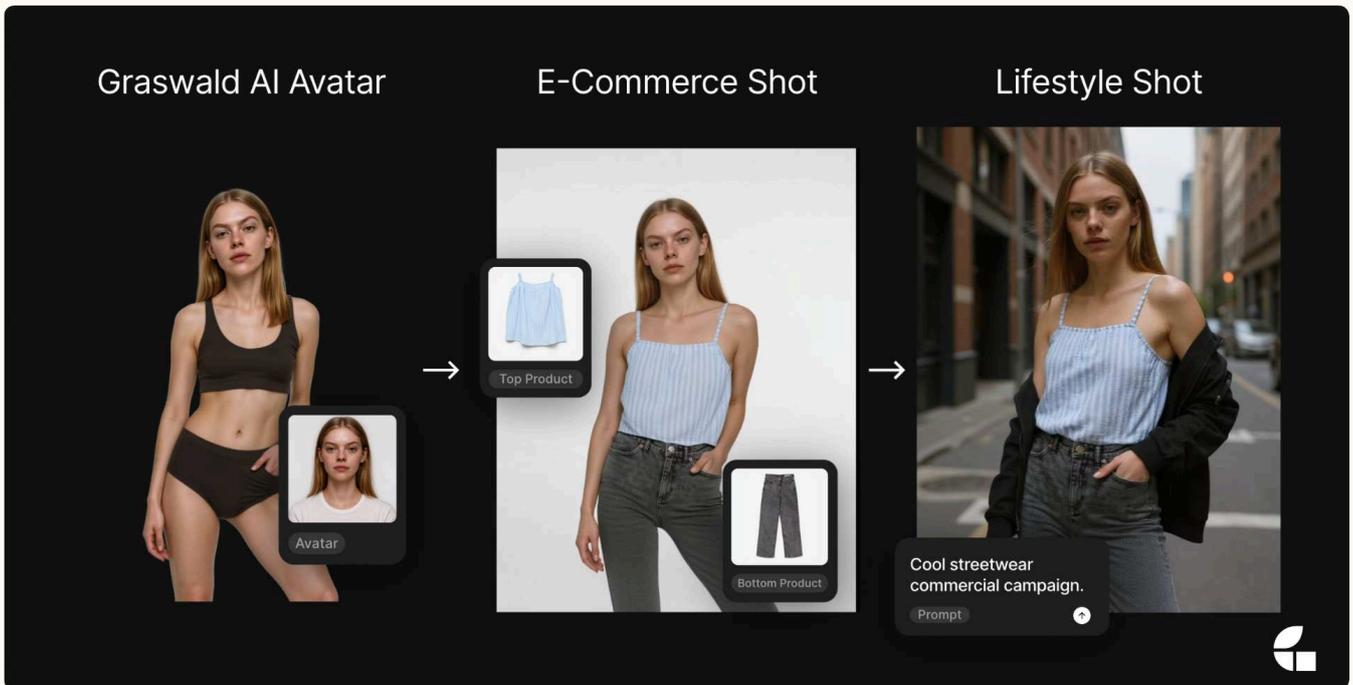
This is actually what inspired our solution, where we've taken the strengths of generative models and built a platform that solves a real pain point in fashion: producing content at scale without sacrificing brand quality or creative control.

My background is in 3D — and for years, that was the industry's go-to for creating new visuals. But it's slow, expensive, and rigid. Today, we're replacing that with generative AI that's not just faster and cheaper, but *actually higher quality* in many cases. That shift is what our product is built on.

***How are consumer expectations around e-commerce evolving—and where are brands falling short?***

Gen Z isn't shopping the way older generations did. It's not about searching for a specific item — it's about discovering a mood, a moment, a vibe. Anyone can make a white t-shirt. What matters is the story around it. That shift puts huge pressure on brands to deliver more inspiring content, more often, and more tailored to individual audiences.





This is both a big opportunity and a big challenge for brands, as it requires authenticity, personalisation, and consistency. Consumers want content that feels specific—like the perfect outfit for a summer party—not just another product listing. That means flatlays aren't enough anymore. More than ever, brands need to show humans wearing clothing in specific scenes and moods.

But that kind of content is hard to produce at scale with traditional methods where you have complex logistics and long wait times.

I see with our clients daily how AI can help here, giving brands the ability to create personalised, high-quality product imagery at scale — using digital models, dynamic environments, and consistent styling — without the cost or lead time of a physical shoot.

**How has content production for e-commerce changed? What impact is AI having?**

The old model of content creation — seasonal campaigns, long lead times, massive crews — just doesn't work anymore. Trends break on TikTok in the morning and are old news by evening. The brands winning right now are the ones who can create content at the speed of culture, Zalando is a great example here.

AI enables reactive, scalable content creation. It shifts the role of content creators from planning to curating. That means teams get to be faster, more flexible, and often smaller. You no longer need a 10-person crew.

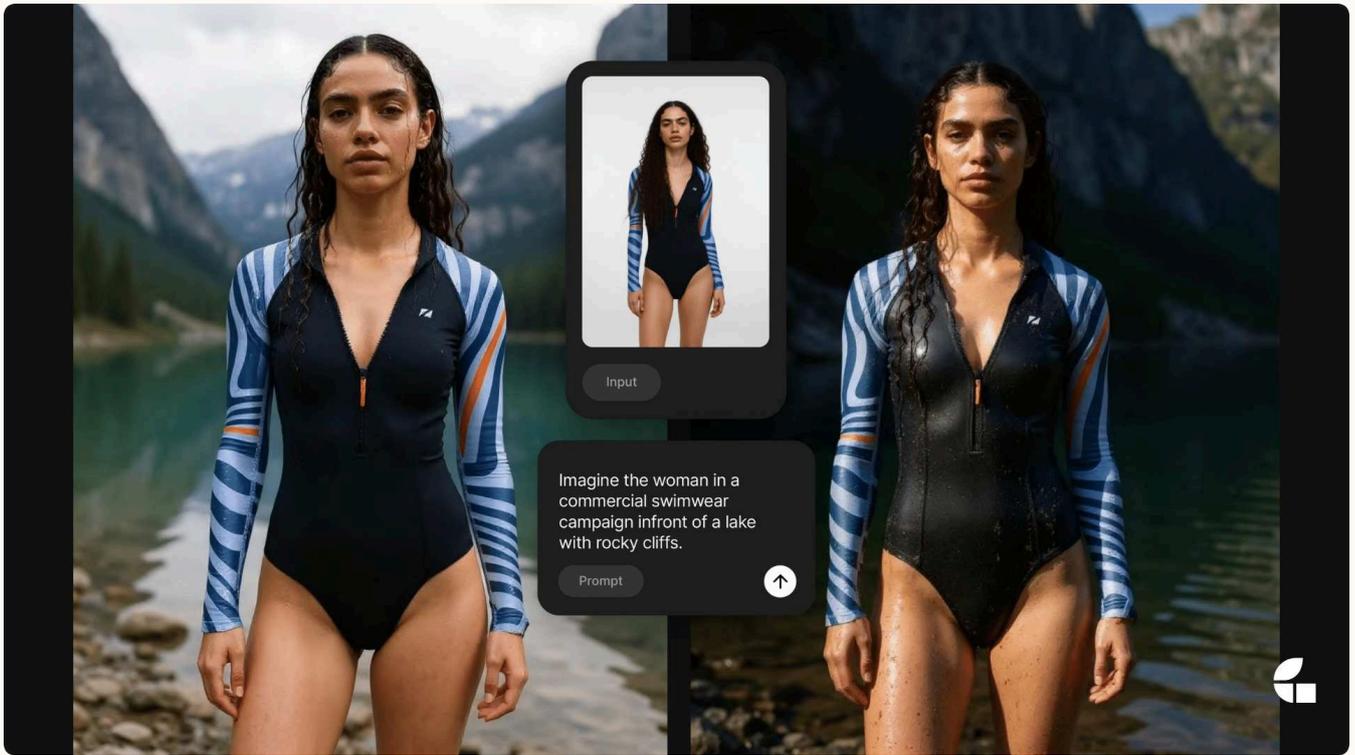
Instead, you need one smart, creative operator who knows what good looks like, what the brand story is, and a high-performing, specialised AI tool (like ours) that gets them there.

**What are the trade-offs brands face when using AI-generated content?**

It's a cultural shift as much as a technological one. Consumers expect more tailored content, and AI makes that possible. But there's sensitivity around authenticity—brands worry about realism, accuracy, and trust. If something looks fake, it can damage credibility.

That's why curation is so important. AI creators become gatekeepers—deciding what fits the brand and what doesn't. From our clients, we know that consumers often prefer AI-generated content—especially when they don't know it's AI. The key is quality, relevance, and alignment with brand identity

So when you put the right creative controls in the right hands, you don't lose authenticity. You enhance it — because now you can tell 100 stories, not just one.



**Generative AI is evolving fast. How has that affected your approach, and what's next?**

Pace of innovation is probably the most important cultural aspect at Graswald AI.

Every week, we see new breakthroughs—new models, techniques, or workflows. We're constantly testing and implementing them, always focused on solving real customer problems. We ask: will this help our customers create better, faster, or more affordably? If yes, it goes in. If not, we move on.

That said, two challenges still stand out: cost and compute time. As realism improves, models get heavier. But fast, low-cost iterations are essential for creative users. The next evolution will bring faster feedback loops and better UX, enabling brands to be even bolder and more expressive.

In the future, creativity will be the main differentiator in the Fashion e-commerce space, and AI tools that solve specific pain points will be the key to channeling and leveraging this.

**What do you believe are the next steps for how AI in general is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?**

Both. Today, most desk jobs revolve around transforming data—analysing, enriching, and sharing it. Cloud made it scalable; UI made it accessible. Now AI, especially multimodal language models, is automating that transformation with minimal input.

These models are getting better at doing more with less context. A year ago, you needed elaborate prompts for a good output. Now, a few keywords or a link can yield equal or even superior results. In time, we won't need interfaces in the traditional sense. AI will gain context from how we already work and interact with our human team. We may end up with tools that need no visible interface at all. Just input and intent.

**FOUNDED: 1991**

Hyland empowers organizations with unified content, process and application intelligence solutions, unlocking profound insights that fuel innovations. Trusted by thousands of organizations worldwide, including more than half of the Fortune 100, Hyland's solutions fundamentally redefine how teams operate and engage with those they serve.

Hyland's flagship solution for DAM is Nuxeo, which is a cloud-native offering that relates operational data with digital content throughout the product supply chain - from ideation through to market. The platform leverages content services with a configurable data model and business-specific AI. With low-code configuration, personalized applications can be assembled and continuously enhanced.

Hyland's Nuxeo Platform offers two ways for companies to enrich and optimize their DAM processes through AI:

- **Generic AI:** Connect to a broad set of public AI services for common use cases (general classification, enrichment, OCR, speech-to-text, etc.) where commodity ML models provide generic services. This includes targeted models (e.g. transcription, OCR) and large-language models.
- **Business-specific AI:** Train machine learning models on your content and data to get highly relevant insights and enrichments that enable specific business use cases across defined domains. Custom models deliver more meaningful outcomes for the business.

Hyland's new vision and product strategy centers around its Content Innovation Cloud (CIC). This new platform enables customers to leverage content, process and application intelligence across business systems and repositories. While Nuxeo will remain Hyland's solution for DAM, additional AI capabilities will be available through Hyland's CIC core components, including Content Intelligence, Process Intelligence and Application Intelligence.

## Headline customers

**Electronic Arts  
Lululemon  
Mad Engine Global  
PVH**

**TBWA Worldwide  
VF Corporation  
Warner Bros  
Consumer Product  
Goods**

FOUNDED: **1991**

**Pricing model:**

*Our current AI licensing model is based on the concept of processing credits. A credit is a unit of measure by which the AI service capacity is quantified (i.e. the number of training hours, the number of prediction requests and the models that are made available).*

## Technology partnerships

**Cloud Vendors:**

*AWS suite of services  
(recognition, transcribe,  
translate, comprehend etc.)*

*Google suite (vision etc) -  
2016-present*

**OpenAI/Dall-E (connector) - 2022**

**Loci.ai (connector) - 2023**

**Naker.io (professional affiliate) -  
2024**

**Composable Prompts (API layer,  
prompt construction) - 2023**

**Active users worldwide across the following regions:**

**50%** North Americas      **30%** EMEA

**<5%** LATAM                **<5%** APAC

**What role do you see your application playing in the future of AI for fashion?**

Hyland sees our AI services assisting fashion and retail organizations by accelerating their concept to consumer activities; building more transparency and traceability into sustainability reporting; and facilitating employee enablement and productivity.

**contact**



# Transform your enterprise digital content supply chain



**Accelerate concept to consumer**  
Make content actionable



**Automate your go-to-market**  
Ensure data-driven decisions



**Augment with AI and ML**  
Reduce redundancy

[Explore Hyland Nuxeo](#)



**Chad Malley,  
Global Director –  
Digital Asset  
Management  
Practice,  
Hyland  
Software**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

Most clients are either in the “early adoption” or “early majority” stage of the technology adoption curve. And I say that because as you describe AI is an extremely broad set of capabilities that most companies haven’t completely rationalized. When it comes to GenAI and commoditized Chatbot services, most everyone is in the early adoption category, but when it comes to the most sophisticated uses of AI there are very few companies that have achieved that level of maturity. The pace of evolution we are seeing in this space is unparalleled. Very few companies have the time, financial means, and the resources to keep up and accelerate through the exploration to advanced stage adoption.

Generally speaking, we are at the very forefront of having well-defined areas of measurable return that make AI adoption a no-brainer and a default investment mandate for every organization. However, we are seeing a common set of capabilities and popular AI adoption trends, but the ROI results remain mixed and, in some cases, difficult to quantify so not everyone is jumping in head first without hesitation.

That pertains to the end user side of the market, but almost every technology and service provider is leading with AI as the foundational value proposition of their offering and Hyland is no different in that transformation.

***AI has the potential to operate across a lot of different surfaces, but there’s perhaps no surface wider than content at the moment. From the stories brands and retailers tell consumers, to the assets and objects that internal teams rely on for communication and collaboration, there are more channels to populate with more content than ever. How have you seen that content management problem evolve? And how have you approached applying AI to it?***

You are absolutely right that content continues to proliferate and the consumer channels are

also expanding in ways that couldn't have been envisioned, but in many ways the content management problem hasn't changed that drastically. The scale and the gravity of the challenge is what's evolved most prominently. What I mean is that organizations have always been faced with the need to manage diverse content types; multiple content versions; multiple content sources and various data models for process automation and reporting. They also had to deal with governance, security and access controls.

The difference now is the scale of those content dynamics. Organizations are burdened with the pressure of creating more content than ever before and along with that growth comes the need to intelligently manage more content than ever before. With the channel proliferation, the magnitude of places of where content is stored, distributed and consumed is broader than ever before making discovery, governance, reporting and auditing a more pronounced challenge.

AI can play a major role in every aspect of that content scale and operational complexity. AI can be used to create new content; auto-classify content, enrich metadata and content lifecycles, trigger content rules and automation scenarios, assist in search and discovery and recommend and curate content for syndication, distribution and process insights.

At Hyland, we are delivering on all of those AI strategies to amplify intelligence for both structured and unstructured content to help our customers better serve their customers.

***A major challenge of any asset management initiative is data structuring and governance. Fashion companies are only capable of deploying technology to manage the information they have properly centralised and available. What's your perspective on the readiness of companies, large and small, to really take advantage of AI from that perspective? Or is AI itself a solution to the challenge of what information and assets live where?***

You often hear that AI is only as valuable as the data you put into it. And there are elements of truth to that sentiment, but successfully leveraging AI requires iteration and experimentation. You have to start somewhere and leverage the data that you currently have access. Leveraging crowdsourced large language models is a good place to start. View those public sources as a

launch point vs. a barrier of entry. Aspiring to create a perfect data set or looking to create a low cost way to train a model based on organizations custom vocabulary isn't practical particularly if you are a smaller organization where resources and budgets will always be constrained.

This segways to the readiness aspect of the question. Readiness is a multi-faceted consideration. Contemplating whether your organization is ready for AI enablement should be viewed from different perspectives regardless of the size of your company; Are your processes mature enough to support the activation of AI intelligence? Crawl-walk-run methodologies aren't circumvented simply because of technology advancements. Is your enterprise data accessible and qualified for AI activation? Do you have teams or 3<sup>rd</sup>-party resources dedicated to the AI oversight, governance and on-going monitoring? AI shouldn't be treated differently than any other technology program simply because of its popularity or because the C-Suite is telling you to prioritize it.

Is AI a solution to the challenge of what information and assets live where? I would say it's a partial solution because it's only a piece of the equation.

***You've been deploying AI for long enough now to have seen both the potential pitfalls and the success stories of customers who have implemented it. Where have you seen them achieving the most success?***

The clients that I have seen have the most success have properly managed their leadership's expectations and haven't made KPI commitments without assessing what's feasible and what's not given the level of effort the organization is willing to put into the AI program(s). I stress the word *program* in that last sentence as its important to recognize that AI is not a project that you simply kick off and end with a specified set of deliverables. AI requires all of the core tenants of any other program; vision, sponsorship, staffing, cross-functional collaboration, change management and accountability.

The organizations that are achieving the most success with AI appreciate these program prerequisites and have implemented *Centers of Excellence* around these efforts with an intent to experiment, learn & adapt with AI as an undisputed contributor in their on-going transformation initiatives.

Successful use cases examples are:

- Semantic search - search beyond limits of existing tags and keyword metadata and to capture results too broad or subtle for what's possible with traditional metadata attribution.
- Metadata enrichment and classification – auto-generated metadata and automated custom taxonomy metadata population, classification, tagging.
- Content discovery – content analysis, summarization and extraction from diverse sets of content and integrated enterprise datasets.
- Asset production automation – automated image editing of repetitive tasks (e.g. background knockouts) and focused, guideline-based content variation generation.
- Design visualization support – product assortment visualization and exploration
- Content validation and approval – guideline and template-based validation and regulatory reviews that trigger automations and workflows

***On the opposite end: what should our readers avoid or what potential negative impacts of AI initiatives should they be aware of?***

I really appreciate this question because its not talked about enough and its rarely a topic on most AI meeting agendas. The first elephant in the room to bring up is that AI is not FREE and in fact its rather expensive. Most organizations are not well versed in AI cost models and what the expense drivers are over time. The irony is that most organizations are looking to save money by turning to AI and there is a high yield return that should be accepted from the AI program's inception.

The second impact that I would call attention to is that AI services still don't represent judgement or authenticity assessments. When you are talking about content creation scenarios or consumer facing services, you want to have oversight and safeguards in place to ensure you haven't autonomously outsourced your brand voice and brand identify to a non-human. Just because you can use AI in certain areas of your business, doesn't mean you should.

And the last opposite end position I would mention relates to AI security and IP protection trade-offs. Large language models (LLMs) are becoming more and more accessible, but their value is only as influential as the training data they leverage which are uncontrolled sources.

The value of the LLM is largely based on the application & accuracy of the predictions it provides which are only as credible as the data that is feed into model. Organizations want more reliable and business specific insights, but that only happens if those same organizations relinquish access to their data which necessitates security and IP compromises.

***What do you believe are the next steps for how AI in general is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?***

There is a lot to unpack in this closing question. First I believe technology should be a behind the scenes enabler, but that ideal has taken a backseat to AI promotion and interface exposure in almost every digital experience we interact with these days. The reality, however, is that AI must work and work well inside the application where it is being used. It is critical that it is embedded in the process that truly helps the user complete a task or make a decision. To accomplish this, the AI will need to be configured and/or customized to accommodate each organizations' asset bases, adjacent data sets and overall business-specific use cases. Packaged AI tools today simply can't accommodate this variability

Eventually, I think there will come a time when its prominence isn't as in your face as it is today, but I also don't believe its going to become a quieter commodity that just relegated to a behind the curtain orchestration. AI is like a magic trick. Its equal parts awe and curiosity that makes it attractive. AI providers must balance its tangibility with its mystique so it will continue to be both; a foundation of next generation applications and an experiential aspect of the front-end interfaces that we engage with.

# KALYPSO

A ROCKWELL AUTOMATION BUSINESS

[WWW.KALYPSO.COM](http://WWW.KALYPSO.COM)

Since **2004**, Kalypso has been a trusted advisor to retail product leaders inside many of the world's most notable brands. And for more than a decade, we have earned a reputation as pioneers of digital transformation, applied data science and Product Lifecycle Intelligence (PLI) in our industry.

Kalypso's global team of strategists, data scientists and technologists excel in "delivering difficult digital." We leverage the latest virtualization, automation and advanced analytics capabilities, combined with two decades of change management expertise, to drive transformative business outcomes throughout your entire product lifecycle—from concept to customer.

Our [data science practice](#) specializes in interpreting business needs and applying cutting-edge analytics techniques to transform diverse sets of product, process, and customer data into predictive and prescriptive insights. We call this [Product Lifecycle Intelligence](#).

We challenge conventional approaches like stand-alone proofs-of-concept or foundations-first thinking. Instead, we collaborate with clients to establish a self-sustaining analytics program that fosters value creation by continuously identifying use cases, developing solutions and putting them to work at scale.

## Kalypso's Data and AI Services:

### Consulting

- Data Science Strategy & Road Mapping
- Value Realization & Business Case Development
- Data Governance & Stewardship
- Analytics Translation & Human-Centered Design
- Implementation & Scaled Operationalization
- Organizational Change Management & Workforce Training

### Data Science & IoT

- Exploratory Data Analysis Studies
- Data Engineering & Architecture
- AI/ML Model Development
- Integrated AI Advisors & Agents

### Enterprise Technology

- Data Pipeline, API & UI Development
- AI-Enabling Enterprise Architecture
- Industrial-Scale Digital Twins for Product & Production Optimization

### Application Managed Services

- ML Ops
- Application Management
- Cloud Infrastructure & Hosting

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FOUNDED: 2004

## Which AI solutions do you work with, and in what capacity?

We at Kalypso: A Rockwell Automation Business always put our clients and their desired outcomes first - as a result, we bring an informed perspective and a solution-agnostic, open-architecture approach to serving them. Since no two client ecosystems or opportunities are the same, having the flexibility to choose the best suite of solutions for the job is essential.

Kalypsonians are experienced across the full spectrum of technology entry points – deploying off-the-shelf software, leveraging open-source models, developing bespoke glass-box solutions, and partnering with market leaders like Microsoft, Nvidia and AWS to solve seemingly impossible challenges and deliver transformative results for our clients.

In the world of industrial intelligence, our parent company, Rockwell Automation has applied a hundred-year history as market-makers and innovators to offer a full-stack analytics and DataOps platform within its FactoryTalk™ family of solutions.

## Headline customers

We help apply AI across the product lifecycle to:

- Discover new opportunities
- Create winning innovations
- Make product efficiently
- Move the right product to the right customer at the right time

We respect the confidentiality of our clients but have included a few anonymized examples of recent client engagements below. Full case studies are available upon request. Please reach out to [Hadley.bauer@rockwellautomation.com](mailto:Hadley.bauer@rockwellautomation.com) to schedule time to walk through the approach and results of our top case studies. Our team would love to share our stories with you.

### *Global Footwear and Apparel Brand*

#### **Reduced Product Line Volatility with Digital Advisors**

- 85% accuracy rate in forecasting dropped styles, significantly enhancing the ability to anticipate and mitigate line volatility

### *Leading Retailer*

#### **Enhanced Customer Experience and Product Insights with Digital Advisors**

- 97% returns classification accuracy rate
- 100-fold increase in complaint processing speed for rapid resolution of product issues

### *Global Leader in Personal Care*

#### **Sped Approvals with Real-Time User Guidance**

- 20% reduction in BOM rework and approval times, streamlining development of new products
- 50,000+ fewer data quality issues annually by addressing errors before they impact production

### *Leading Retailer*

#### **Optimized Warehouse with Robotics and Simulation**

- 13% throughput increase
- 84% reduction in the impact on an error on throughput
- \$1 million+ projected hardware cost savings per site

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FOUNDED: 2004

## AI processes covered:

Kalypso has proven results in enabling AI solutions at scale that bring predictive, prescriptive, and generative AI capabilities to every stage of the end-to-end product lifecycle inside our retail, footwear & apparel clientele. We thrive when delivering "difficult digital."

Common use cases include:

### Discover phases

- Always-On Trend Monitoring
- Competitive Analysis
- Line Plan Optimization
- New Material or Innovation Simulation

### Create phase

- Suggestive & Generative Design
- Design Sustainability Optimization
- Design-to-Cost Analysis
- Voice of Consumer Preference & Market Testing
- BOM & Tech-Pack Auto Completion

### Make phase

- Quality Test Simulation
- Prescriptive Vendor Allocation & Network Rebalancing
- Automated Industrial Engineering & Optimization

### Move phase

- Demand Sensing & Inventory Optimization
- DC Workforce & Line Optimization
- Analysis of Real-Time Consumer Feedback

## How do you define 'Artificial Intelligence' for Fashion, and what role do you see application(s) of AI playing in the near-term future of fashion?

Although the retail footwear & apparel industry has lagged others in the adoption of many digital capabilities (e.g. 3D digital product creation, production automation), our clients are experts in distilling consumer behaviour, culture and trends to deliver craveable products through multimodal channels of influence. They are vanguards of leveraging data science to market product to the masses. However, until recently, few have endeavoured to turn that capability inward to transform their own product design, development, assortment and production processes. But no more.

The omnipresence of artificial intelligence (AI) across life and business, coupled with the rise of intuitive generative tools for visual ideation, content creation, and digital prototyping, has poised the fashion industry for its next explosive wave of digital transformation.

Today, many of Kalypso's clients are rapidly deploying capabilities in novel ways across product & supply chain functions. They are applying the latest in advanced analytics and AI to foster design creativity and collaboration, augment expert intuition, streamline repetitive tasks, drive operational efficiencies, improve responsiveness to fast-moving trends and drive confidence in key product, assortment & investment decisions.

These brands are capturing millions in value and unlocking previously inaccessible ways of working that position them to simply outpace and outperform competitors who choose to sit on the sidelines.

contact



Amplify creativity  
through better data,  
smarter workflows and  
more **human-centered**  
**decision making**  
**with AI.**



LEARN MORE



Chelsea Barnes,  
Sr. Manager,  
Data Science  
and Digital  
Transformation,  
Kalypso, A Rockwell  
Automation Business

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**Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?**

**Chelsea Barnes:** The answer entirely depends on where in the value chain AI is being applied. If you think of AI's use in brand outreach that's a space with broad use, mature tools and proven ROI. However, when you consider other functions such as design, quality or merchandising, AI use is only now gaining momentum. The key difference between these groups is the availability of quality data. The "big data" functions of commercialization and marketing have had more to work with and for longer. Adoption has been slower for functions grappling with foundational data-readiness challenges.



Chelsea Snyder,  
Sr. Technical  
Consultant,  
Retail Industry  
Expert,  
Kalypso, A Rockwell  
Automation Business

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Until brands invest in organizing and integrating their data, AI applications will struggle to produce insights or outputs that translate into sustainable business value. The promise is there, but the groundwork is still being laid.

**Nobody will argue with the idea that fashion is a creative industry, but it's fair to say that the processes of turning creative ideas into commercially-viable products that are manufacturable at scale have come to dominate the industry's mindset, because those are the steps that could be quantified, controlled, and to some extent automated. Do you think AI changes that framing? Should we now be interrogating more complete, end-to-end workflows, applying the same scrutiny, and asking what AI can do to control and add value to a wider spectrum of processes and free creative professionals up to focus on the ones it can't?**

**Chelsea Barnes:** Absolutely. A key shift we're seeing right now, and one we encourage, is looking across the value chain and scrutinizing where humans are *really* needed in a task and where AI agents can be deployed to automate and streamline a workflow.

**Chelsea Snyder:** Agree. Industry leaders are scrutinizing end-to-end workflows and finding real value in using AI to automate repetitive, low-value tasks that often consume the time and energy of creative professionals. By offloading those tasks, such as data formatting, trend tagging, or iterative variations, AI can free up space for designers and creatives to focus on the higher-order work: ideation, storytelling, and aesthetic decision-making.

Ultimately, I see AI not as a replacement for creativity, but as a collaborator - an intelligent assistant that supports the process, while leaving the final expression to the uniquely human qualities of taste, emotion, and authenticity.

*Like with any hyped technology revolution, the possibility space with AI is seemingly so vast that there are solutions being actively sold in every conceivable category - and the temptation for brands surrounded by internal challenges and external pressures is to go after them all and to prioritise them according to some often pretty subjective criteria. What do you think is the right decision-making framework to use to make more grounded choices about which AI applications will actually translate into competitive advantage, and which ones will complement existing transformation initiatives like digital product creation?*

**Chelsea Snyder:** In a space as saturated and fast-moving as AI, the key to making grounded, strategic decisions starts with clarity: clarity around the problem you're solving, the maturity of the AI solution, and the measurable outcomes you expect. It's not about chasing every opportunity. It's about aligning AI initiatives with clearly defined business pain points and existing transformation goals.

A useful framework starts with identifying high-friction areas within core workflows - places where time is lost, where decision-making is delayed, or where creative energy is drained by repetitive tasks. From there, it's important to vet AI solutions not just for their theoretical capability,

but for their practical fit. Ask questions like: Can they integrate with existing systems? Can they be tested quickly in a contained pilot? Do they augment human value rather than add new layers of complexity?

In the case of digital product creation, the potential is enormous - shorter timelines, faster iteration cycles, and more responsive design processes. But as with many AI solutions, some tools are still maturing. Brands should approach these with curiosity and discipline, partner with vendors transparently, and continuously evaluate whether the tool is truly enabling creativity or unintentionally redefining the role of creatives in ways that may not align with their strengths or passions.

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*Ultimately, I see AI not as a replacement for creativity, but as a collaborator - an intelligent assistant that supports the process, while leaving the final expression to the uniquely human qualities of taste, emotion, and authenticity.*

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**CHELSEA SNYDER,  
SR. TECHNICAL CONSULTANT,  
RETAIL INDUSTRY EXPERT,  
KALYPSO, A ROCKWELL  
AUTOMATION COMPANY**

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*For a range of different reasons, fashion has become fixated on generative AI. This is why we see so many companies offering generative solutions to aid designers, or to replace product photography. For some - maybe many - companies these are no doubt areas where AI can deliver a quantifiable return, but they're also the thin end of a much bigger wedge, and the emphasis that's being placed on them perhaps hides the huge variety of different AI applications out there - from inventory management to quality control. How should brands and their partners be thinking about this much wider frontier?*

**Chelsea Snyder:** Generative AI has captured attention because it's visual, immediate, and easy to grasp, but it's just one part of a much broader AI landscape. To unlock real, sustained value, brands need to step back and take a more holistic view. That starts with identifying their core operational challenges – whether it's excess inventory, long lead times, quality inconsistencies, or inefficiencies in the supply chain – and mapping AI opportunities against those pain points.

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*A key shift we're seeing right now, and one we encourage, is looking across the value chain and scrutinizing where humans are really needed in a task and where AI agents can be deployed to automate and streamline a workflow.*

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**CHELSEA BARNES, SR. MANAGER,  
DATA SCIENCE AND DIGITAL  
TRANSFORMATION,  
KALYPSO, A ROCKWELL  
AUTOMATION BUSINESS**

**Chelsea Barnes:** Exactly. Once those opportunities are mapped, you can look at the right solutions to achieve the desired goals. Here are some questions to consider: Are there out-of-the-box tools to meet your company's needs or is something custom needed? What kind of AI algorithm is best suited to the problem – does the output need to be more deterministic and explainable, making traditional ML a better fit, or is the need around information crunching or ideation, making Generative AI a better fit? What data and infrastructure is available to support these use cases?

With the clarity that comes from answering these questions, brands can feel confident the technology choices they're making are right-sized for the problems to solve. The emphasis should be on feasibility, fit, and value creation, rather than getting distracted by what's most visible or hyped.

*As much as we're talking about technology here, there are also two different cultural elements to consider when it comes to AI adoption: the ethics of consumers around AI in general, and how receptive internal audiences and teams are to specific tools. Each of those is likely to spill over into the other, making the next step on this journey as much about external communication as it is about internal change management. How do you think fashion companies should approach rolling out AI progressively and sensitively - in a way that avoids overwhelming teams or creating backlash amongst end users or consumers?*

**Chelsea Snyder:** AI adoption isn't just a technological challenge; it's a cultural one. Fashion brands must treat it as such. Internally, it's about change management and introducing AI in a way that empowers teams rather than overwhelms them. Externally, it's about trust – communicating openly with consumers without overexposing sensitive or proprietary processes.

Transparency is key, but it needs to be thoughtful. Consumers don't expect brands to reveal every detail of their workflows, but they do expect honesty about how technology is being used, especially when it touches creative output or customer experience. Brands should proactively shape the narrative, emphasizing that AI is a tool, not a replacement for human creativity. The final product should still reflect the emotion, intuition, and authenticity that define great design.

Internally, progressive rollout is essential. Start with use cases that remove friction, such as for repetitive, low-impact tasks, and involve teams early in the process. Make them collaborators, not just users. By demystifying the tools and clearly articulating their benefits, companies can reduce resistance and build internal champions.

Ultimately, this is about balance. It involves combining strategic transparency with strong internal alignment to build trust, maintain authenticity, and evolve responsibly. The brands that handle this well will be the ones that treat AI not just as innovation, but as a relationship with their teams and with their customers.

***What do you believe are the next steps for how AI is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?***

**Chelsea Barnes:** AI is becoming both a new interface and a foundational layer, much like cloud infrastructure before it. On one hand, it's increasingly visible in the tools we interact with every day. On the other, its deeper value will emerge through less visible, systemic enhancements that power efficiency and insight behind the scenes. That dual trajectory is what makes this moment both exciting and complex.

**Chelsea Snyder:** We're also seeing a growing cultural counterbalance. As AI evolves, so does the desire to reaffirm and protect what is distinctly *human*. This tension is productive and forces brands to deploy AI with more thoughtfulness, not just speed. Success won't come from adopting tools in isolation, but from embedding them into well-managed, human-centered systems.

**To deploy AI progressively and sustainably, brands should focus on these next steps:**

- **Invest in training and literacy.** Ensure teams understand not just what AI tools do, but how to use them efficiently. Educating teams helps avoid tool fatigue and builds long-term adoption.
- **Prioritize change management.** AI isn't plug-and-play. Rolling out tools should include internal communication plans, pilot programs, and feedback loops to help people adapt at a manageable pace.
- **Audit and align tech stacks.** Evaluate how AI integrates into your existing systems—and how it affects (or replaces) legacy workflows. Stay proactive about evolving or retiring outdated tools.
- **Designate AI ownership.** Create roles or responsibilities within teams to track AI advancements, evaluate vendor updates, and translate technical shifts into business relevance.
- **Balance visibility with value.** Don't only chase the flashiest AI use cases. Explore backend applications—like planning, logistics, and supply chain—that may be less visible but deliver massive ROI.
- **Stay rooted in your brand's human voice.** Let AI do the heavy lifting, but ensure the final experience still feels authentic, emotional, and distinctly you.

# LECTRA

WWW.LECTRA.COM

FOUNDED: 1973

At the forefront of innovation since its founding in 1973, Lectra provides industrial intelligence technology solutions—combining software in SaaS mode, cutting equipment, data, and associated services—to players in the fashion, automotive and furniture industries. With boldness and commitment, Lectra accelerates the transformation and success of its customers in a world in perpetual motion thanks to the key technologies of Industry 4.0: AI, big data, cloud and the internet of things.

At Lectra, innovation is about transforming customer processes by leveraging advanced technologies to optimize and automate workflows. With the integration of the Internet of Things (IoT), Big Data analytics, and Artificial Intelligence (AI), our Industry 4.0 solutions enable fashion players to engage with their customers in new and meaningful ways. Among Lectra's portfolio covering the fashion value chain, we can highlight four solutions that have AI capabilities: Valia Fashion, an intelligent cloud-based solution which empowers fashion brands and manufacturers to connect, automate and streamline every step of apparel production, Retviews, a highly specialized market intelligence tool, TextileGenesis, a market-leading traceability platform that enables brands to track fabric from fiber to retail, and Launchmetrics, a brand performance cloud that optimize and measure brand performance and connects strategy with execution.

AI has emerged as one of the most transformative technologies of our time, with the potential to reshape business processes. Since its founding, Lectra has been driving market-transforming innovation. Today, we are accelerating our customers' transition to Industry 4.0 and revolutionizing the way they do business.

## Headline customers

### Retviews:

Bally  
Balmain  
Diesel  
IKKS  
Jacquemus  
Maison Margiela  
Pinko

### Valia Fashion:

Chicago Protective Apparel

### TextileGenesis:

Bestseller  
H&M  
Kering  
M&S  
On

### Rubix Link:

Antony Morato  
Boggi Milano  
IKKS

## Pricing model:

All of Lectra's software solutions are sold in SaaS mode. Lectra works with all types of companies in the fashion market, where the group has had a presence for over 50 years. Lectra's customers are mainstream, high-end and luxury consumer brands, companies specialising in manufacturing garments for third parties or for their own brands as well as distributors.

## Technology partnerships

In 2024, Lectra has been signing two strategic partnerships with companies developing AI-based solutions:

**Six Atomic** develops and sells **SaaS solutions based on Artificial Intelligence**, particularly **generative intelligence**, to streamline and accelerate the garment **design and development process** for the fashion market.

**AQC** develops and sells **SaaS solutions based on Artificial Intelligence** and innovative equipment for **automatic textile defect recognition** powered by machine learning algorithms. AQC aims to accelerate the **textile quality control processes**, which are still largely manual and rely on the expertise of highly skilled operators.

## What role do you see your application playing in the future of AI for fashion?

Lectra's teams are working with customers on a daily basis to identify the business processes that could benefit most from AI. Created in 2018, our Innovation Lab explores disruptive innovations such as generative AI in an open innovation approach.

For the near-term future, our goal remains the same: to collaborate with all stakeholders to increase productivity, streamline operational flows and limit waste to remain competitive and sustainable in the marketplace. A growing number of companies want to take advantage of the phenomenal potential of data, and Lectra is there to support them.

contact



## THE CONNECTING THREAD, FROM CONCEPT TO STORE.

Weave success into the fabric of your business, with solutions that support every phase of the garment lifecycle.

Create better, manufacture better and market better, empowered by real-time insights, seamless collaboration and complete traceability.

An interconnected approach ensures fashion data flows freely through every stage of the process, supported by Industry 4.0 technologies, notably artificial intelligence.

Making your path to growth, profitability and sustainability clear.

**We light the way, so you can build your success story.**

**LECTRA**

We pioneer. You lead.



**Maximilien  
Abadie,  
Chief Strategy  
& Product  
Officer,  
Lectra**

***Where do you believe we currently are on the progression curve from AI as an extremely broad set of capabilities and promises, to AI as the foundation for applications and services that can deliver a measurable return on investment in well-defined areas?***

We are entering a pivotal phase in the evolution of artificial intelligence. Lectra has been embedding AI into its solutions since the 1990s, long before it became a mainstream topic. Early implementations included optimization algorithms and expert systems in technologies such as Diamino and Vector, designed to maximize fabric yield and automate complex cutting decisions. For decades, AI algorithms have supported process optimization in our industry. Today, we are witnessing a major inflection point. Breakthroughs in data processing and reasoning are unlocking new strategic opportunities across the entire fashion value chain. At Lectra, we are harnessing these advances to deliver AI-powered solutions that address concrete business challenges. Our objective is clear: to transform data into actionable insights that enhance decision-making, boost agility, and drive measurable improvements in performance and return on investment.

***One of the key use cases for AI is extracting meaningful insights from large, complex datasets at the kind of speed and scale that human workflows can't match. People often talk about that in the context of forecasting, or risk modelling, but there's also a much broader perspective that takes in all the different variables and datapoints that fashion generates and consumes, to create a complete set of "fashion data". Given Lectra's perspective across all the different domains of fashion - what you refer to as create, manufacture, and market - how do you see AI being applied at that whole-industry level, and what value can it create?***

AI can deliver its full potential when it connects the entire fashion value chain—from design to production to marketing. At Lectra, we integrate AI into solutions like Valia Fashion, Launchmetrics, Retviews and TextileGenesis to transform data into actionable insights. This enables brands to anticipate demand, optimize production, and benchmark performance in real time. By breaking down silos, AI helps fashion companies gain agility, improve margins and operate more sustainably.

***Thinking about applying AI to the whole scope of fashion data also raises some deep questions about enterprise-wide data governance, ethics, and security that Lectra, with close to a decade of making data from across the connected value chain usable, has probably had time to think about. If the near future is going to see brands and their partners applying a relatively new class of technologies and ideas to whole-industry problems, what is it going to look like to do that in a way that's efficient, ethical, interpretable, and useful?***

There are no shortcuts, scaling AI in a meaningful way requires solid data foundations, transparent logic, and strong governance. At Lectra, we've spent the past decade connecting more than 8,000 of industrial systems and structuring data flows across the fashion value chain. This long-term commitment ensures data quality, traceability, and secure access, cornerstones for responsible and efficient AI deployment.

Solutions like Valia Fashion and TextileGenesis exemplify this approach. Valia Fashion not only provides real-time visibility into production performance, but also enables advanced simulations, accurate fabric consumption estimations, and automated production allocations based on predefined parameters. By connecting equipment, teams, and systems across geographies, it supports agile, scalable, and sustainable operations.

TextileGenesis applies rule-based AI to ensure end-to-end traceability from fiber to finished product, offering full transparency and auditability at every step of the supply chain.

At Lectra, AI is designed to remain interpretable and enhance, not replace, human expertise. Ethics, explainability, and accountability are embedded by design, supporting both operational excellence and long-term trust.

***If we look past the big, sweeping, questions, most AI strategies - and most technology initiatives in general - have a more pressing near-term goal: to help deliver transformation in areas that the industry has identified as priorities for change. Across the value chain, Lectra has some examples of this kind of focus in action, so walk us through, for example, where AI is contributing to transformation in product design, textile quality control, material yield optimisation, and measuring brand performance.***

AI is already driving concrete improvements across the value chain. In manufacturing, Valia Fashion enhances planning and fabric optimization. Recently, Lectra has signed a strategic partnership with AQC which develops AI vision systems to automate and improve defect detection. On the marketing side, Retviews AI-based solution supports real-time competitive benchmarking and Launchmetrics uses AI to add insights into brand performance. These offers are operational today and delivering measurable results.

***There are very few companies that have the same scale of direct presence in fashion manufacturing as they do in design, development, and other domains. That reach matters for reasons we've already talked about, but it could also put a lot of power into the hands of companies that are actively working to reduce their impact, track their product journeys, and comply with disclosure requirements and vehicles like Digital Product Passports. If you think about the production-level visibility you're building with the Valia Fashion platform, and the fibre-forward traceability you're architecting with TextileGenesis, what role do you think AI has to play in the new toolkit for sustainability.***

AI plays a pivotal role in making sustainability measurable, traceable, and actionable. With TextileGenesis, we leverage rules-based AI to tackle the challenge of fiber-to-retail traceability, ensuring data integrity and enabling compliance with evolving regulations. Valia Fashion enhances this by providing granular, real-time visibility into production processes. Together, these solutions empower brands to not only substantiate their sustainability claims but also to continuously refine and improve their practices. AI facilitates a shift from reactive compliance to proactive impact management, which is increasingly becoming a key competitive differentiator.

***What do you believe are the next steps for how AI is deployed and used? Is it more likely that AI will solidify its place as a new human interface paradigm the frontend of tools and workflows? Or is its future closer to what cloud infrastructure has become today - a quieter commodity that is still the foundation for the next generation of applications, but in a less obvious way than what we've seen over the last couple of years? Or is it both?***

AI will play a dual role in the future. On one side, it will remain a visible interface, enhancing decision-making and creativity by providing real-time insights and augmenting human intuition, especially in areas like design and planning. On the other side, AI will continue to serve as the invisible backbone, driving backend automation, analyzing large datasets, and enabling greater interoperability across systems. This dual nature, visible intelligence for user interaction and invisible AI for data processing, will make AI an integral part of technology stacks, much like cloud computing has become today, driving both efficiency and innovation in the background.



# MARKET ANALYSIS

EVALUATING AI'S TRANSITION FROM WIDE-OPEN POSSIBILITY TO TANGIBLE PRODUCTS, MAPPING INVESTMENT, AND UNDERSTANDING HOW TRUST IN AI SOLUTIONS IS BEING BUILT THROUGH PROVABLE VALUE AND INFRASTRUCTURE.

## WHAT IS AN AI SOLUTION?

To undertake this year's market analysis, we began with the same judging criteria we applied in [our 2024 Report](#). To qualify as an AI solution for fashion and / or beauty, a platform must be commercially available (closed market testing does not count) and in the hands of named, active fashion customers who are paying to use it. A platform need not be AI-native in the sense that it did not exist before the current boom in generative AI, since many pre-existing software suites now look different, to varying degrees, following the addition of AI capabilities - but it must incorporate clearly visible AI capabilities.

Just as we observed last year, though, this leaves us with an extremely broad canvas to scrutinise. While some AI startups catering to the fashion or beauty industry have folded in the last twelve months, the software playing field overall has continued to expand in scope and diversity.

There are, unambiguously, more AI companies that cater to fashion in 2025 than there were in 2024. And with major AI companies like Google and Nvidia seeing multi-fold increases in the number of startups joining their developer ecosystems, there's little sign that the market for AI solutions is set to contract any time soon.

This is not to say, however, that all the solutions that are crowding the market today - or the companies behind them - will be viable long-term, or are even viable as they stand. Like any technology sector in boom-mode, AI is attracting a staggering amount of capital investment, and hoovering up a growing share of operational budgets, as different companies compete to figure out which ideas, interfaces, models, workflows, and systems will stand the test of time.

In that scenario, we continue to believe that the right way to analyse the AI market, therefore, is not to attempt to evaluate a complete cross-section of it, but rather to take a quantitative look at the wider industry, and then to filter that data through the perspectives of real brands, retailers and technology suppliers to document more qualitative signals that provide a tighter lens on where AI is headed in fashion.

To that end, this analysis is built on two pillars: a snapshot of the wider landscape for AI solutions in fashion (using a blend of publicly available information and our own insights), and a deeper examination of some of the leading technology companies and service providers who cater to it. As we did last year, we have interviewed executives from some of those companies, assessed their pricing models, customer names, partnership strategies, and other variables.

And as was the case in 2025, the section prior to this one captures profiles of those companies, and can be used (alongside the 2024 report, which contains a different slice of AI companies that cater to the fashion industry) as a starting point for shortlisting and evaluating products.

Upon reading that section of this year's report, it should become immediately clear just how diverse the category of "AI solutions" has become. Within this publication alone, we have both qualitative and quantitative data about the deployment of AI in and around: body data; full-stack go-to-market transformation; digital product creation and content creation; product design and development; on-model generative product photography; asset, content, and object management; strategic business direction and cultural change management; and comprehensive suites of solutions that apply AI across the extended product journey, everywhere from textile quality control to market performance.

And that is just confining ourselves to a selective analysis of the process coverage mapped by this year's technology sponsors. Beyond the companies you'll find profiled in this report, it is also effectively guaranteed that any other functional area you might examine will be catered to by both new, AI-native products and by pre-existing tools and platforms that have had AI capabilities added to them.

All of which means that, in a very measurable and practical way, shopping for "an AI solution" is no longer a meaningful exercise, because every solution will incorporate AI to a greater or less degree. Or, to put it another way, buying fashion software of virtually any kind is also buying AI software.

## THE DIFFICULTY BUILT INTO DIVERSITY

This, for obvious reasons, makes AI an extremely difficult area to evaluate in its full form - the equivalent of evaluating the market for "internet solutions" at the tipping point where all software was either being translated to the web, or even in today's world, where the web has become the primary application layer for effectively every consumer and enterprise technology segment.

This, in itself, is a major milestone. We are, after all, not yet three years into the current generative AI cycle, and already it has suffused essentially every category of software. This is significantly faster than the halting transition that took place when enterprise software in particular went "off-premise," and while deep concerns remain around security and intellectual property, we have seen very few brand and retail companies argue against the idea that AI represents the next logical wave of software innovation.

But this universality does complicate any attempt to evaluate the software sector. Where there was a reasonably lengthy transitional period during which different software companies argued for and against deploying apps and services via the internet, that moment of friction appears to have all but passed with AI. And as a result, we are essentially "speed running" the turn from local to cloud-based software (which the majority of end users barely think about today) and moving extremely quickly towards a moment where AI simply becomes a pillar of how technology operates - with natural language interfaces substituting for GUIs by default, and large language models and their toolsets being incorporated into solutions of every shape and size.

(We should note that the primary providers of those frontier models, companies like OpenAI, are not considered to be fashion AI solution providers for the purposes of this analysis, even if their products seem set to work their way into software that does cater specifically to fashion or beauty.)

This analogy also raises a slightly deeper question. User-facing web applications today are just the tip of the spear when it comes to just how gigantic the market for cloud-based, web-native compute, storage, and distribution has become.



## ROLL-OUTS, REGIONS, AND INFRASTRUCTURE VS. INTERFACES

Based on the data made available directly to us this year, and the information we have been able to gather from a wider analysis, nothing has changed in the makeup of the market for AI solutions.

Just as they were in 2024, essentially every customer of AI software in fashion is purchasing it on a software as a service basis (although “software” is not always the right label, since the input, inference process, and output of AI models is denominated in tokens) using either subscription pricing or usage-based models. And while there are definitely brands, retailers, manufacturers, and suppliers finetuning models and creating their own bespoke applications, those initiatives are not replacing ongoing subscriptions to big cloud models at any real scale. The average customer of AI in fashion is still, essentially, everybody.

This catch-all is also extended across every business type and every geography. Unlike other technology segments, where brands and retailers are usually the earliest clients and the biggest beneficiaries, AI is being made available to everyone at once, across the entire extended value chain.

This is also an interesting angle through which to look at our comparison between the contemporary AI moment and the slower onramp to the internet era. While web connectivity eventually became a unifying thread that connected businesses of different types, shapes, and sizes in different regions, that roll-out was progressive, halting, and unevenly distributed for some time.

This ‘big bang’ availability, though, runs the risk of rubbing the shine off AI more quickly than it did the web. It took a sufficiently long time for the internet to become unremarkable, backend plumbing, that new ideas and innovations continued to be built around it well after the initial hype had subsided (and the first wave of companies had been pared back, sometimes catastrophically) in regions that saw earlier and more comprehensive telecoms infrastructure roll-out.

It’s difficult to say whether this represents a missed opportunity in AI, but there is reason to suspect that all stakeholders being handed the same set of keys at the exact same time will lead to, at the very least, an extremely different (and perhaps more egalitarian) set of outcomes to those that were created by what was arguably the most comparable technology revolution in recent memory.



*\*Image created using AI.*



*\*Image created using AI.*

Irrespective of where they sit in the value chain, though, it remains an open question just how long AI will remain compelling, as a software category in its own right, in the eyes of consumers and enterprise buyers. Barring a surprise reveal that machine superintelligence is possible (something The Interline doesn't expect to be the case), the clearer short-term uncertainty for the sector is whether AI will continue to be expressed as text / voice interfaces that are also products in their own rights, or whether AI is set to become the equivalent of Amazon Web Services or Azure - a suite of quiet hyperscaler infrastructure designed to make the next stage of growth achievable.

The latter would certainly be a less head-line grabbing outcome, but there's reason to expect that it will be at least part of the picture over the next two-to-three-year period. Every AI application will require a model to be trained and run, and while some of that inference can be done locally, on-device (as we analyse shortly) the remote provision of AI inference is likely to remain one of the major reasons for money to continue to change hands.

But at the same time, the plumbing, the protocols, and the tools required to enable AI agents to work will also need to be provided, maintained, and expanded - and big enterprises are not likely to be willing to leave those tasks solely to the open source community. In a world where "PLM+MCP+LLM" isn't just acronym soup, but rather a description of a workable new model of computing, the companies whose solutions house the right data and offer the right tools will be the ones in charge of how information flows - and how people are compensated for it.

It can seem, to outside observers, as though this steady slide from AI as an exciting, limitless prospect, to AI as everyday IT is a foregone conclusion. But analysts, investors, and enthusiasts alike believe it won't be; those groups see the current age of AI as something close to the command line era of computing, where a huge amount of power is leashed to an interface paradigm that only appeals to a particular cohort of people. And the reasoning that flows from this is that the equivalent to the GUI era (i.e. the current dominant method of interacting with software and data) will be so novel that completely unforeseeable applications and experiences will be built on top of it.

In practice, based on the data and the perspectives available to us this year, we expect the future to flow fairly evenly down both paths: AI as we understand it, and as its expressed today, will steadily become a deeper, but less remarkable part of every applications, but there is the strong possibility that fundamentally new experiences, solutions, and systems will stem from that infrastructure, and that these will represent the next step change in how the fashion and beauty industries think about software as a whole.

## TWO-LANE PARTNERSHIPS

From this year's analysis, it also appears that the wider industry shares this split prediction between AI as a broad set of general-purpose capabilities to be integrated and designed around, and AI as the potential next unlock for an entirely unpredictable future to be prepared for.

When we examine the technology partnerships disclosed in this report, and stack them alongside the integrations and agreements between other parties, we see large amounts of links to infrastructure for machine learning, data analysis, and powering fresh experiences without the need for non-specialised technology vendors to become model developers themselves.

But we also see clear partnership strategies emerging between specific AI applications and the tools and solutions that come before or after them in the product journey - from bridges between 3D simulation and body data, to hooks from generative patternmaking to production, or generative content creation and eCommerce.

There is, as of yet, little being actively solved that proposes a codified model context protocol approach for fashion systems, or that aims to build company-level memory graphs that can be shared between systems. But there are enough AI companies catering to fashion that already offer their capabilities through existing APIs that the seeds of new collections of agentic services and microservices are at least taking root.

## MARKET MATURITY

As we remarked last year, the perception that AI is primarily sold by startups and young scale-ups is inaccurate. While there's little doubt that most pure-play AI companies are relatively new businesses, the distribution of technology vendors who actually sell AI software to fashion and beauty businesses was - we saw in 2024 - heavily skewed towards what we defined as "established" companies, with years of reputation already under their belts.

In 2025, that share has likely risen slightly from 70%. Like a lot of variables when it comes to AI, it is hard to place an exact figure on this, since new companies are being constantly launched, but these new entrants are emerging at about the same rate that existing software and non-software companies are adding AI to their solutions, so the balance between the two has remained about the same.

In practice, customers continue to turn to startups and new entrants for novel ideas that are simply not available elsewhere in the market, while they demand more robust, stable, enterprise-ready applications when it comes to integrating AI into the hearts of their workflows.

In the longer term, this gap is likely to close; big, established technology companies will eventually lose their in-built route to sell new AI capabilities to existing audiences, and startups and scale-ups will, themselves, hit progressively higher bars for security and reliability, effectively scaling their solutions for the demands of big enterprises.

In the immediate future, however, we expect more established software companies to continue to have the edge with the largest brand customers, if only because their existing scale and reputation will make it more straightforward for them to forge the kind of agentic protocols that will allow AI models to extract the sort of mission-critical information that already resides in those big enterprise platforms.



*\*Image created using AI.*

## A VAST SURFACE FOR VALUE

Once they have defined the right balance between innovation and enterprise reliability, the evidence shows that fashion professionals (and the companies they work for, across the extended value chain) have extremely high targets for AI to achieve - not at some indeterminate point in the future, but by the close of 2025.

Based on global research undertaken by MMGNET, in partnership with The Interline, more than 80% of people who work in fashion believe AI will deliver measurable value this calendar year. And close to 60% of companies have already bet on that potential value, with active AI projects already underway (this includes both the addition of AI to existing platforms, tools, and workflows, and the introduction of new software and solutions that bring AI capabilities with them). That figure even rises to 80% when the horizon is broadened to take in companies that have AI initiatives in-scope for 2025.

As we transition into the second half of a year where expectations for AI delivering a return on investment are high, it's becoming clearer just how vast the potential surface for obtaining that value is - and how unique and idiosyncratic different strategic approaches to obtaining it will be.

From content creation to agentic supplier management, and from generative pattern development to generative video advertising, there are so many different angles into AI ROI that how each company quantifies it will be unique. And we will see similarly pronounced variance in how deep that value runs; we are already observing companies whose entire business models are built on algorithms working along companies who are, at least so far, tinkering on the edges of their operations with AI pilots and ideas.

Crucially, though, neither of these different cohorts of businesses is talking about the value of AI in nebulous terms. At the time of last year's report it was still the case that the business case for AI projects was made with vague promises of "efficiency" and "productivity," but in 2025 there are clearer frameworks in place, and the majority of serious AI projects are mapped to clear pain points and quantifiable deliverables.

But like any technology or transformation project, there are no cast-iron guarantees. And with such a wide set of possibilities for companies to go after, clearly not all of these avenues will bear fruit - which is already placing a greater burden on the areas that are delivering against expectations.

As much as we recognise that there is no such thing as "buying AI software" as a fully standalone category, there is a tangible sentiment that if AI, as the technology that underpins a lot of new strategic initiatives, is not delivering in one area, then that colours the perception of its ability to deliver in others. How successfully the fashion and beauty industries will be able to decouple the results obtained from specific AI products from AI in general is, in our estimation, perhaps the biggest cultural roadblock to come.





\*Image created using AI.

## SPENDING AND MARKET SIZING

That value equation, luckily, has other variables on its good side. While there is no question that new skills, new systems, and extensive change management support will be required to obtain real value from AI, the investment required in core models and hardware is sliding rapidly downwards towards commodification.

According to [the Stanford University AI Index for this year](#), the cost of inference with powerful models has dropped dramatically in an extremely compressed window. A model with equivalent capabilities to GPT 3.5 (the model that was behind the original launch of ChatGPT in November 2022) became 280x cheaper in the span of time between that initial launch and October 2024 - and this trend has continued into 2025, with optimisations making models like Google's Gemini 2.5 Flash (which has roughly equivalent capabilities to initial disruptive models from Deepseek) considerably cheaper to call on.

At the same time that closed-source, cloud-hosted models have been making capability gains, similar improvements and optimisations have also made open-weight and open source models more capable and more efficient, putting some of them within reach of consumer grade hardware. While there is obviously reason to see Anthropic, OpenAI, and Google as the forerunners in providing the core models behind many AI applications, the reality is that the number of different computationally complex models (defined as models larger than 1,203 FLOPs) has risen from a handful in 2017 to more than 100 today. And this does not include fine-tunes, distillations, or quantisations of existing models.

For many brands and retailers, at this point in time, local AI is not on the radar, and their default mode is to license AI from the largest American companies, but as industry investment into downsizing generative AI models continues, we expect to see companies increasingly evaluating open-source models - especially smaller organisations.



In something of a weird inversion of the typical software trajectory (which has been moving resolutely off-premise for more than a decade at this point) we may, in fact, be about to see fashion entering a cross-industry hardware race, if the industry indexes further towards privacy, control, and ownership where AI is concerned.

We do not, to be clear, expect hardware spending to scale to anything like the amount of money that fashion will spend on cloud-based AI inference (either as subscriptions on on a usage / token basis), and those budgets are significant. Despite a prevailing economic mood of gloom, and an associated pullback from a range of different initiatives, the same research from MMGNET and The Interline shows that more than 65% of fashion professionals believe that investment in technology is justified - and the majority of companies expect to grow that investment through the second half of 2025.

Some of that spending, certainly, will be directed at non-AI technology initiatives. But realistically, given the extent to which AI has become integrated into existing platforms and tools, the majority of it is likely to flow towards solutions that are either AI-native or that incorporate AI capabilities.

For the purposes of this analysis, though, the question is whether that investment in AI will be sustained into 2026. According to [reporting from the Economist](#) (which cited research from S&P Global) only 17% of companies had abandoned “most” of their generative AI pilot projects in 2024, whereas that share now stands at 42% for this year.

This is a tricky statistic to parse. For one thing: more companies embarking on AI initiatives will inevitably lead to a greater share of them failing to reach takeoff, since many companies - particularly at this level of skillset development - are simply still building the muscle needed to be able to turn AI to their advantage. And for another, that same relative lack of maturity - which is consistent across big and small companies alike - will inevitably lead to misalignment between vision and actual capabilities.

In the larger scheme of things, we do not expect this finding to result in any serious pullback from AI spending in 2026 - especially if AI research labs continue to release new functionality and new modalities, and if fashion-focused technology vendors continue to translate those capabilities into real solutions for the challenges that fashion businesses face.

This feeling is backed up by a [widely-cited paper from Mary Meeker](#) - famed venture capitalist and author of reference reports on “Internet Trends,” who has recently migrated to producing similar reports on AI - which pulls from disparate data sources to demonstrate that AI spending is already separating from the trajectories that previous enterprise spending waves followed, with costs decreasing faster, and user adoption rising more quickly than any previous frame of reference.

\*Image created using AI.

Meeker is famous for pointing out that, at the time of the dotcom boom, a year in the world of internet business (a similarly vague taxonomic block to “AI business” today) was equivalent to seven years’ worth of rise, fall, and recovery in other sectors. If we apply the same rubric to what The Interline, the companies profiled in this report, and the wider market are seeing, then it feels as though an even greater time dilation effect could be in play.

Have we, then, seen the equivalent of seven years of market growth, adoption, and technology advancement since our last market analysis in 2024? In some senses - certainly where the core capabilities of AI models and the tools and scaffolding being built around them - are concerned, absolutely. Fashion, like most businesses, is an AI industry today in a way that it was not in 2024.

In terms of AI projects that have actually achieved lift off and delivered value, the picture is more complex. Many of these pilots go undocumented and undisclosed (we are made aware of some of them off the record), but the ones that are made public are largely succeeding because they align clear challenges with tailored solutions. Product market fit, in other words.

That alignment between goal and solution is precisely what the technology sector has realised and capitalised on so far in 2025, and based on the growing number and diversity of products that now cater to fashion and beauty, we fully expect to see more focused solutions, delivering greater returns, in the near future.

At the same time, however, ubiquity will not necessarily lead to unqualified success. According to Google, the developer ecosystem for AI has expanded 5x in the past year alone, and while only a fraction of that crowd will be designing solutions for fashion, the overall expansion of AI is currently universal. In fact, there is simply so much AI being introduced into the fashion software market - making a granular analysis extremely difficult - that the market itself will be the sole authority that determines how the good applications are separated from the bad.

All of which means that, for analytical purposes, our next step may just be to track AI in more specific lanes - or to document individual processes and functions and evaluate how AI is transforming them. Because it’s clear that the software sector for fashion in general is taking on a very different shape as we head into 2026 - one whose final form is going to be determined not by any nebulous idea of superintelligence or AGI, but by a pragmatic combination of new models, bigger models, better scaffolding, better tools, reinforcement learning, better products, and a savvier, more seasoned user community.

***The Interline would like to extend our thanks to every technology and service provider who took part in this AI Report, and to all our editorial contributors - as well as our friends and sponsors at MMGNET - the fashion ecosystem behind milestone industry events and content.***

***We hope you found value in this publication, and we encourage you to bookmark The Interline for more coverage of AI as the technology, and the industry around it, develops - both in regular stories, special projects, and in the release of our next AI Report in the spring of 2026.***

***If you are a technology company creating AI-native tools or adding meaningful AI capabilities to existing platforms, or a brand, retailer, or supplier using them, and you’d like to be featured in next year’s AI Report, please [contact us](#).***



*The*  
**INTERLINE**

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