The Gold Institute
For International Strategy

Turning Tariffs into Opportunity:

How the Global South Can Reshape U.S. Textile Supply Chains

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Introduction: The Tariff Shock and the End of Single-Source Efficiency

The COVID-19 pandemic laid bare the fragility of a global supply chain system built for efficiency rather than resilience, revealing how decades of just-in-time offshoring left the world economy acutely dependent on a narrow set of industrial hubs. Analysts estimate that nearly a quarter of the post-2020 GDP and inflation impacts arose from shocks moving through supply chain networks, demonstrating how tightly interconnected production can amplify disruptions.

International organizations such as the United Nations Industrial Development Organization (UNIDO) and the Organization for Economic Cooperation and Development (OECD) have long urged governments and companies to diversify suppliers and develop stronger regional production networks as a means of counteracting rising import concentration. Their message is clear: a supply chain built on multiple nodes with trusted and reform-minded partners is far more resilient to shocks than one concentrated in a single source of production.

This logic soon translated into policy, as governments began using tariffs as defensive barriers and as instruments of strategic rebalancing. By 2024, protectionism re-emerged as the organizing principle of global trade. From Mexico to India, governments imposed steep duties to insulate key sectors from foreign shocks. The United States undertook the most sweeping shift, announcing a 10 percent baseline tariff on almost all imports in April 2025, followed within days by reciprocal measures that pushed duties on some categories above 50 percent. According to Yale's Budget Lab, these actions raised the effective U.S. tariff rate to roughly 22.5 percent, the highest level since 1909.

This move reflects President Donald Trump's revived America First economic doctrine, which ultimately seeks to reshape globalization so that critical value chains reinforce American security, strategic leverage, and middle-class prosperity. The doctrine prioritizes reducing dependence on adversarial states by dispersing production across a broader network of democratic, reform-oriented partners rather than concentrating it within a single authoritarian hub.

This new tariff architecture has generated far-reaching effects across the global economy, with labor-intensive supply chains bearing the brunt of adjustment pressures. The apparel sector exemplifies this vulnerability: few industries rely so heavily on cross-border inputs, sequential processing, and tight cost margins.

Even after years of supply-chain rebalancing, China still supplies roughly 21 percent of U.S. apparel imports and nearly 70 percent of global polyester capacity. As a result, tariffs on Chinese filament and yarn ripple through the entire clothing value chain. This pressure is compounded by reciprocal U.S. duties on other major textile- and apparel-exporting nations including Bangladesh, Vietnam and Cambodia, which now stand at 46–49 percent, representing the steepest increase in decades and a structural shock to low-cost apparel pricing.

Economically, this concentrated dependency ultimately reaches the American consumer: experts predict the 2025 tariff package could raise apparel prices by about 38 percent in the short term, with clothing costs remaining roughly 17 percent higher over the long run.

That said, this period of disruption also marks a moment of reset, offering the U.S. an opportunity to recalibrate its supply chains, insulating them over the long term by steering production toward a broader set of reliable partners; particularly in the Global South, where reform-oriented economies offer both cost advantages and growing institutional credibility.

This report sets out a pathway for that transition and explains why the current moment makes such a shift both necessary and achievable, focusing especially on the potential of a tri-regional production network linking Bangladesh, Kenya, and Peru. Together, these partners provide competitive manufacturing bases and demonstrable governance progress; organized under a “many-nodes, one-standard” system in which production is distributed across several jurisdictions but disciplined by a single floor of labor, environmental, and transparency requirements, they can diversify risk, strengthen compliance, and support a more resilient and values-consistent model of globalization.

Bangladesh: The Anchor Economy

Industrial and Trade Foundations

For U.S. policymakers seeking to convert tariff shocks into strategic opportunity while rebalancing sourcing away from China, Bangladesh offers the most credible and scalable partnership in the global apparel supply chain, built on four decades of industrial depth, product diversification and rapid digital upgrade.

Its ready-made garments (RMG) sector has quietly become the world's second-largest apparel exporter, generating more than 80 percent of the country's total export earnings, employing four million workers, and contributing roughly 10 percent to the gross domestic product.

A cornerstone supplier to American and European retailers, Bangladesh's export revenue has climbed from USD 5 billion in 2000 to more than USD 50 billion by 2025. According to OTEXA, garments worth USD 2.22 billion were shipped to the U.S. in Q1 2025 – a 26.64 percent year-on-year increase, the fastest growth among major sourcing countries. This included around 10.6 percent of all T-shirts imported into the U.S., with Bangladesh offering the lowest average unit price at USD 1.76, well below Vietnam (USD 2.68) and Honduras (USD 2.10), reflecting a production base that can scale reliably with rising American and global RMG demand, supported by large integrated clusters and continuous capacity expansion. While cotton basics still dominate, Bangladeshi manufacturers are rapidly moving into value-added, high-fiber production, framing the country as a rising hub for sportswear, outdoor, and technical apparel once dominated by China and Vietnam.

Bangladesh's location on the Bay of Bengal further reinforces its strategic relevance. Situated along emerging Indo-Pacific shipping corridors, the country provides U.S. buyers with a sourcing base outside the China-centric maritime network, with competitive transit times to the U.S. East Coast. Infrastructure upgrades – port automation, improved road-to-hub logistics, bonded-warehouse reforms, and customs simplification – are reducing lead times and increasing dependability at a moment when supply-chain resilience is reshaping corporate sourcing decisions.

These efforts are being reinforced by a new National Port Strategy, now being finalized with Japan's International Cooperation Agency (JICA), which will unify port management and introduce a maritime single-window digital platform. The result is a sharper "speed-to-market" profile that positions Bangladesh as a reliable,

strategically located partner for U.S. brands diversifying production across the Indo-Pacific.

Reform, Innovation, and Sustainable, Cost-Reducing Practices

Bangladesh's apparel industry is already shaped by a long arc of reform and innovation. Since the 1980s, the sector has undergone successive waves of modernization; strengthening labor regulation, improving factory oversight, and expanding worker protections. These advances have taken hold in a sector that now employs around four million workers, the majority of them women, and which the World Bank and the International Labour Organization (ILO) identify as critical driver of women's economic empowerment and poverty reduction by integrating low-income rural women into formal wage employment. Over the past decade alone, wages have risen over 300%, and the Better Work Programme – a joint initiative by the ILO and the International Finance Corporation (IFC) – has improved conditions for more than a million Bangladeshi workers.

Sustainability is embedded in Bangladesh's industrial DNA, offering significant economic gains. Analysts note that energy accounts for up to 20 percent of production expenses, so shifting to clean energy improves operational efficiency and lower long-term costs. Recognizing this, Bangladeshi manufacturers have embraced renewable power and efficiency upgrades, hosting 268 Leadership in Energy and Environmental Design (LEED)-certified green factories, including nine of the global top ten and 18 of the top 20. Policy initiatives such as the Partnership for Cleaner Textile and the Green Transformation Fund are accelerating investments in water and energy-efficient production. This trajectory extends across new economic zones: the National Special Economic Zone (NSEZ) is being developed as a low-carbon industrial city with renewable-energy systems and full environmental-compliance infrastructure, and the Bangladesh Special Economic Zone (BSEZ) applies Japanese standards in green design and wastewater management for high-value, export-oriented manufacturing.

At the frontier is the Korean Export Processing Zone (KEPZ), developed and operated by Youngone Corporation, which anchors some of Bangladesh's most advanced outdoor and technical-apparel facilities. It hosts the country's largest rooftop solar array, producing around 38MWp – a scale rarely seen in South Asian manufacturing zones and broadly comparable to a small power plant. When factories adopt solar power, studies show that energy costs can decline by about 40 percent with payback periods of two to three years. This not only reduces operating expenses for producers but also lowers the per-unit cost of garments sold to brands and consumers.

KEPZ also pairs restored wetlands, extensive tree cover, and biodiversity corridors together with hospital clinics, schools, and affordable housing, showing how industrial expansion can be aligned with worker welfare and environmental stewardship.

This integration of production and environmental management is complemented by cutting-edge material technologies. Youngone is driving advances through its award-winning Ecoloft Zero insulation, a 100 percent recycled-polyester material recognized by ISPO Textrends for turning production scrap into high-performance textiles. Other firms like H&M Group (headquartered in Stockholm, Sweden) and Chorka Textile Ltd. (based in Dhaka, Bangladesh) are piloting next-generation European technologies capable of cutting greenhouse-gas emissions by 56 percent and reducing freshwater use by 30 percent.

Digital quality-control tools, IoT-enabled inspection points that integrate machine sensors with cloud-based dashboards, and automated cutting systems are now widespread. Together, they are slashing material waste, preventing unsold inventory through on-demand production, and improving process efficiency. Such technologies can directly reduce costs for manufacturers and prices for consumers benefiting U.S. brands seeking to keep costs affordable for consumers while meeting stricter sustainability expectations.

Strategic Partnership Potential with the United States

As U.S. companies move to dilute overrreliance on China, they are shifting production toward suppliers that can offer scale, predictability, and political alignment. Bangladesh fits that trajectory more closely than most competitors: it operates one of the few non-Chinese manufacturing ecosystems capable of absorbing large order volumes, and it sits within a strategic Indo-Pacific corridor where Washington is seeking to anchor more of its economic partnerships.

This diversification logic also underscores why Bangladesh's market-access outlook now carries strategic weight. Current U.S. duties on Bangladeshi apparel, at roughly 20 percent, dilute the cost advantages firms seek when shifting production away from and out of China. At the same time, Bangladesh's planned 2026 graduation from least developed country (LDC) status will phase out longstanding preferential access in Europe and other major markets.

The risk is not that Bangladesh loses its competitiveness, but that rising tariff exposure coincides with the precise moment U.S. policymakers are encouraging firms to scale up sourcing outside China. In the absence of a smoother transition, American buyers

could face higher landed costs, and Bangladesh could see slowed investment in the safety, sustainability and compliance systems that Washington increasingly views as essential to resilient supply chains.

The reform drive led by Dr. Muhammad Yunus is therefore strategically relevant. His focus on transparency, institutional neutrality, and strengthened labour protections aligns with U.S. expectations for credible, values-consistent partners. Crucially, the timing builds momentum ahead of the 2026 national elections, signalling durability in administrative practice and continuity in implementation. For international partners, sustained execution and consistent enforcement will be the principal tests of investor confidence moving forward, cementing Bangladesh's reputation as a reliable manufacturing partner as supply chains adjust.

Taken together, Bangladesh offers Washington an opportunity to anchor part of its China-diversification strategy in a democratic, reform-oriented Indo-Pacific partner. With calibrated support, whether through transitional tariff arrangements, expanded regulatory cooperation, or inclusion in a "trusted textiles" framework, the U.S. can turn LDC graduation from a vulnerability into a pivot point, locking in a stable, high-capacity supplier at a moment when global apparel sourcing is undergoing structural realignment.

Kenya: The African Link in the Resilient Chain

Industrial and Trade Foundations

Kenya has emerged as a pivotal production hub in Africa's expanding supply chain, combining reliability, reform, and innovation to anchor U.S. trade engagement across the continent.

The country's advantage lies in a uniquely skilled, English-proficient labor force; strong vocational training systems; and a manufacturing base rooted in culturally distinctive textiles such as the kikoi and kitenge. With women representing more than 70 percent of garment workers, the sector also serves as a significant driver of inclusion and equitable growth.

In 2024, Kenya exported USD 419.7 million in apparel, a 31.24 percent increase from 2023, marking one of the strongest recoveries in the region. The United States remains overwhelmingly the dominant market, absorbing roughly USD 385.7 million, or 92 percent, of Kenya's total apparel exports. Under the US legislation of the African Growth and Opportunity Act (AGOA), shipments to the U.S. rose 19.2 percent in 2024, with export volumes increasing from 97.3 million to 116 million pieces year-on-year. Employment in AGOA-accredited firms grew 15.2 percent, supporting 90,700 jobs and generating an estimated USD 1.05 billion in total sales across Export Processing Zones (EPZs).

Kenya's competitiveness is reinforced by strong logistics performance. With over 105 EPZs nationwide (most privately owned and concentrated in Mombasa and Kilifi), the country's manufacturing network anchors regional trade connectivity and export diversification.

Capital investment in garment EPZs increased by more than 20 percent in 2024, supported by the Athi River cluster and high-capacity connectivity through Mombasa Port and the Standard Gauge Railway. The recent integration of DP World's AI-enabled CARGOES Customs system into the national eCitizen platform further accelerated clearance times and improved risk management, giving U.S. importers a more transparent and dependable sourcing corridor.

Reform, Innovation, and Sustainable, Cost-Reducing Practices

Kenya's textile renaissance is underpinned by policy reforms, labor improvements and sustainability innovations. At its core is a decisive energy advantage: Kenya's grid is now more than 92 percent renewable, sharply cutting manufacturing emissions while stabilizing power costs – an increasingly critical differentiator for global brands under pressure to decarbonize supply chains.

Labor governance provides a second pillar of strength. The U.S. State Department notes that Kenyan labor law largely meets international standards: workers in EPZs can form and join unions, collective bargaining is widespread and anti-union discrimination is prohibited.

Sustainability has become the organizing logic of industry renewal. Rivatex's partnership with the Stockholm Environment Institute introduced the UPMADE upcycling model after audits showed 25–40 percent fabric wastage. Training seamstresses and designers in waste reduction enabled the mill to secure UPMADE certification, positioning it as an early leader in circular production. At Athi River EPZ, the world's first green industrial garment factory – built with repurposed shipping containers and equipped with solar power and rainwater harvesting – will save 18 tons of CO_2 and 1,000 m^3 of water annually. Such projects demonstrate how energy-efficient infrastructure lowers utility bills and reduces overall production costs.

Upstream reforms are strengthening raw-material security. In Lamu, SUED and Thika Cotton Mills are developing the region's first integrated ginning and oil-extraction plant, designed to scale from 800 to 2,000 metric tons of lint. More than 5,000 farmers will be supported through digital advisory tools, climate-smart agronomy, and solar-powered operations – creating a cleaner, more reliable cotton pipeline.

Structural constraints remain: high electricity costs for legacy mills, outdated machinery, and insufficient domestic cotton production. But with renewable-powered manufacturing, targeted investment, and tighter environmental standards, Kenya is building a textile sector that is cleaner, more competitive, and increasingly aligned with global sustainability demands.

Strategic Partnership Potential with the United States

AGOA has been the foundation of Kenya's rise as the leading Sub-Saharan apparel

supplier to the United States, driving rapid employment growth and anchoring an export-oriented manufacturing base built around preferential market access. The program's scheduled expiration in September 2025 exposed a clear vulnerability. Without renewal, Kenyan apparel exports would have reverted to MFN tariffs under the U.S. Harmonized Tariff Schedule, reaching the mid-teens for cotton garments and exceeding 30 percent for key synthetic products, levels that would have rapidly eroded competitiveness in a margin-sensitive sector.

That risk has been temporarily contained by the U.S. administration's support for a one-year AGOA extension, now before the United States Congress. The extension preserves duty-free access through 2026 and averts immediate export and employment shocks. Its limited duration, however, reinforces uncertainty for investors and buyers, constraining long-term planning in apparel and related manufacturing.

This inflection point has pushed Nairobi to pursue a durable, rules-based arrangement with Washington. President William Ruto has made clear that a permanent framework is essential to protect market access and provide long-term stability for investors and workers. Strategic Trade and Investment Partnership (STIP) negotiations, together with the government's plan to secure a new bilateral trade agreement, signal a transition from temporary preferences to a predictable, reciprocal model of cooperation.

Kenya enters this transition with strong fundamentals: it is AGOA's top apparel exporter, meets demanding compliance standards, and operates an increasingly renewable-powered, export-ready industrial base. The one-year extension buys time. Converting that window into a predictable successor framework will determine whether Kenya can lock in its position as East Africa's most reliable apparel partner for the U.S. market.

Peru: The Western Hemisphere Node

Industrial and Trade Foundations

Peru has become a pivotal actor in the Western Hemisphere's supply-chain realignment. Its strength lies in strategic advantage: a rare concentration of premium natural fibers, deep artisanal knowledge, and highly integrated manufacturing capacity.

As global buyers move toward resilient, ethical, and nearshore production models, Peru offers a combination many markets cannot match: globally-recognized Pima cotton, more than 80 percent of the world's alpaca fiber, and a production ecosystem capable of delivering high-value, fully traceable goods.

Peru ranks among the world's top 50 textile exporters, supported by more than 46,000 firms and a workforce of roughly 400,000 – contributing close to 2 percent of national GDP and 8 percent of manufacturing output. In 2024, Peru's textile export value rose to approximately USD 5.2 billion, driven by strong global demand for cotton, alpaca, vicuña and blended natural fiber products. Duty-free access to the United States under the U.S.–Peru Trade Promotion Agreement (PTPA) gives Peru a structural market advantage. This is evidenced in the fact that the U.S. remained Peru's largest buyer over the last two years.

Nearshoring offers a major cost advantage. For U.S.-based brands, manufacturing in the Western Hemisphere reduces shipping distances, simplifies communication and allows for smaller batch sizes. Positioned on the Pacific Rim with direct access to U.S. West Coast shipping routes, Peru benefits from shorter transit times and lower logistical risk than many Asian suppliers.

Major upgrades at Callao and the new deep-water port of Chancay are expected to further reduce lead times and strengthen Peru's nearshore value proposition. These infrastructure investments are projected to add USD 4.5 billion to the economy and will lift GDP by approximately 1.8 percent, reinforcing Peru's emergence as a strategic logistics hub in the hemisphere's reconfigured industrial landscape.

Reform, Innovation, and Sustainable, Cost-Reducing Practices

Peru's textile sector is undergoing a substantive transition driven by labor reform, technological upgrading, and a clear commitment to sustainability; developments that align closely with U.S. sourcing and due-diligence priorities.

Labor governance has strengthened in recent years. Following negotiations between the Federation of Textile Workers of Peru and the national Labor and Social Security Commission in 2021, the government expanded collective bargaining rights, improved workplace protections, and broadened social-security coverage. These reforms reduce compliance risk and position Peru as a supplier capable of meeting the labor-standards expectations of U.S. and European buyers.

Environmental performance is also becoming a defining feature of the industry. Leading manufacturers are investing in water-efficient and low-emission technologies; one company's "waterless" program cut water use in finishing by nearly 70 percent and earned the 2024 ESG & Sustainability Award. Fiber innovation is advancing in parallel, with alpaca-cotton blends, recycled yarns, and fully traceable natural fibers targeting premium markets that value authenticity and low environmental impact. These innovations not only reduce environmental footprints but also minimize resource consumption and waste, lowering production costs.

International visibility is rising as a result. In 2024, eight Peruvian brands showcased at the Copenhagen International Fashion Fair, reinforcing the country's reputation for sustainable design. In early 2025, ten garment companies participated in the Intermoda Fair in Mexico, holding 467 business meetings and securing USD 4.9 million in projected deals.

All in all, these reforms and innovations demonstrate a sector that is modernizing quickly and positioning Peru as a reliable, higher-value, and sustainability-aligned supplier in global textile and apparel chains.

Strategic Partnership Potential with the United States

For the United States, Peru offers something increasingly scarce in global apparel sourcing: certainty. Permanent duty-free access under an existing bilateral trade agreement allows U.S. firms to plan capacity, pricing, and investment without exposure

to the policy volatility now affecting many offshore suppliers. In a tariff-disrupted environment, that stability carries tangible commercial value.

Peru's integrated production base and short Pacific shipping routes support faster turnaround and tighter buyer–supplier coordination, attributes that matter increasingly as U.S. brands shorten planning cycles and reduce inventory exposure. These advantages are most pronounced in higher-value and time-sensitive segments where reliability outweighs marginal cost differences.

From a governance standpoint, Peru presents low compliance friction. Recent labor and environmental reforms align with U.S. due-diligence expectations, allowing firms to scale sourcing without incurring elevated regulatory or reputational risk.

In sum, Peru offers the United States a reliable, rules-based sourcing partner in the Western Hemisphere, combining predictability, speed, and standards alignment. In a fragmented global trade environment, these attributes position Peru as a durable component of a more resilient U.S. apparel supply chain.

Policy Recommendations: Towards a Distributed Global South Supply Network

In conclusion, at a moment of tariff turbulence and geopolitical strain, the U.S. has a rare opportunity to rebuild its apparel supply chains around three of the most dynamic and reform-oriented economies in the Global South: Bangladesh in South Asia, Kenya in East Africa, and Peru in Latin America.

Each has undertaken substantive governance reforms, ranging from labor standards and safety compliance to renewable-energy deployment and digital trade systems, while building competitive manufacturing bases capable of absorbing the redistribution of production away from China. Collectively, they form a natural tri-regional network that offers scale, reliability, cost competitiveness, and growing ESG credibility.

To convert this alignment into a durable strategic advantage, U.S. policymakers should operationalize a "many-nodes, one-standard" model: a system in which diversified sourcing reinforces, rather than dilutes, labor rights, environmental performance, and supply-chain transparency.

Four policy steps can anchor this transition.

First, modernize trade facilitation. A Trusted Textiles accreditation, drawing on models such as C-TPAT and Australia's Trusted Trader scheme, would allow compliant factories to move through green-lane clearance, mutual recognition, and reduced inspections, while snap-back penalties would deter non-compliance. This rewards the very reforms the U.S. seeks to encourage.

Second, expand finance and infrastructure support. The U.S. Development Finance Corporation and EXIM should scale existing renewable-energy and water-efficiency investments into key export zones. The 40 MW rooftop-solar array in Bangladesh's KEPZ shows what is possible; similar deployments across Kenya's EPZs and Peru's manufacturing corridors would embed resilience directly into production hubs.

Third, update market-access rules. Modernizing short-supply lists and enabling temporary derogations, especially for polyester, trims and dyes, would allow U.S.

manufacturers to source inputs flexibly from trusted partners while maintaining preferential access. This aligns rules of origin with the realities of post-China diversification.

Finally, incentivize private-sector adaptation. U.S. brands should spread orders across the Bangladesh–Kenya–Peru corridor, deploy vendor-financing to strengthen smaller mills, pool inventory across regions, and deepen vertical integration. Key performance indicators should include lower order volatility, improved on-time delivery, and stable unit costs.

Taken together, these steps align tariff policy with economic diplomacy. By backing verifiable ESG standards, green infrastructure, flexible market access, and multi-node operations, the U.S. can build a supply network that is resilient, diversified, and consistent with American values – a future-proof model of globalization rather than a retreat from it.

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