

Zava Market Brief

Athletic Fabrics — Polyester / Nylon / Spandex — Q3 Market Brief

Brief ID: MB-2025Q3-FABRICS • Sentiment: Neutral • Updated: 2025-08-25 • Region: Global → NA Retail • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

Core athletic fabrics are stable this quarter. Polyester holds flat with ample supply; Nylon

6,6 shows mild firmness on feedstock; spandex pricing is steady but lead times can stretch on

color-matched lots. For Zava’s leggings, tops, and compression lines, landed cost variance is

more likely from freight than resin price.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
Polyester staple (dex)	\$1.10/kg	+0.2%	+1.5%	High
Nylon 6,6 chip (demo)	\$2.85/kg	+0.5%	+3.8%	Medium
Spandex (elastane)	\$5.60/kg	0.0%	+2.1%	Medium
Dyehouse lead time	9–12 days	+1d	+2d	Low

Drivers & risks

• Driver: Polyester supported by steady PTA/MEG costs and adequate capacity utilization

• Driver: Nylon firmness tied to adiponitrile availability and balanced chip inventories

• Driver: Spandex availability adequate; specialty colors batch-limited

• Risk: Sudden freight surcharges could outweigh resin stability

• Risk: Heat waves impacting dyehouse throughput in select regions

Implications for Zava

• Core leggings/tees BoM costs should hold; protect margins via freight discipline

• Reserve dyehouse capacity ahead of promotional color drops

• Pilot recycled polyester (rPET) blends where hand-feel allows to support sustainability

Watchlist

• Upstream MEG/PTA movements >3% in a week

• Supplier color lab backlogs exceeding 5 days

Recommended actions

• Lock rolling 60-day fabric commitments for top 10 SKUs; keep small spot flexibility

• Pre-approve 2 color substitutes per style to reduce dyehouse bottlenecks

• Validate rPET hand-feel on two high-volume styles; add care-label guidance

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Footwear & Accessories Materials — EVA / Rubber / Zippers — Q3 Market Brief

Brief ID: MB-2025Q3-FOOTWEAR • Sentiment: Neutral • Updated: 2025-08-25 • Region: APAC → NA • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

EVA and rubber inputs are range-bound; the main swing is logistics. Zipper lead times

normalize, but branded pulls and custom tapes still queue. For Zava’s trainers and outerwear,

expect predictable material costs with attention to trims scheduling.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
EVA resin (demo)	\$1.65/kg	-0.3%	+2.0%	Medium
Natural rubber index	\$1.32/kg	+0.4%	+6.1%	Medium
YKK zipper lead time	14–18 days	-1d	-4d	Medium

Drivers & risks

- Driver: EVA follows ethylene dynamics; capacity ample
- Driver: Rubber supported by weather and plantation yields
- Driver: Trim suppliers clearing backlog; customization still a gating factor
- Risk: Peak-season port congestion can slip footwear delivery windows
- Risk: Late artwork approvals for custom zipper pulls create avoidable expedites

Implications for Zava

- Sole unit costs should track BoM; room to shift density/hardness without price shock
- Outerwear production schedules benefit from early trim lock-down
- Custom hardware should be tied to drop calendars with freeze dates

Watchlist

- Lane-specific dwell times >2 days at LA/LB
- Supplier MOQ changes on zipper families

Recommended actions

- Stage trim purchase orders 4–6 weeks before cut-and-sew
- Approve generic pulls for carryover styles; reserve custom for hero SKUs
- Keep a 5% expedite contingency in footwear drops landing within 2 weeks of marketing windows

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Ocean Freight — Transpacific Eastbound → NA-West — Q3 Market Brief

Brief ID: MB-2025Q3-OCEAN-NAWEST • Sentiment: Negative • Updated: 2025-08-25 • Region: Lane: APAC → NA-West (LA/LB) • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

All-in FEU rates remain elevated with GRIs in play. Transits are stable, but reliability still

lags pre-peak norms. For Zava, freight is the largest source of landed-cost volatility this

quarter—bigger than material prices for most apparel lines.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
FEU all-in (demo)	\$5,150	+3.5%	+28%	High
Avg transit (port-to-port)	18 days	0	-2d	Medium
GRI/Surcharges	Active	—	—	Medium

Drivers & risks

• Driver: Blank sailings concentrate capacity and support pricing

• Driver: Peak retail pulls keep load factors high

• Risk: Weather or labor disruptions could add 2–4 days to dwell

• Risk: Chassis availability remains uneven in key yards

Implications for Zava

• Cheapest FOB suppliers can lose on total landed cost vs faster lanes

• Tighter delivery windows around product drops increase expedite risk

Watchlist

• Mid-month GRI announcements

• LA/LB import dwell trends and appointment availability

Recommended actions

• Budget a +10% surge scenario; split loads across two sailings when possible

• Favor suppliers with reliable cut-offs over marginal unit-cost wins

• Maintain a small air-bridge option for A-tier SKUs tied to campaigns

Semiconductors — Microcontrollers & Sensors — Q3 Market Brief

Brief ID: MB-2025Q3-MCUSENS • Sentiment: Positive • Updated: 2025-08-25 • Region: Global → NA • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

Lead times for mainstream MCUs and sensor modules continue to normalize. Pricing is competitive

on high-run families; niche parts still carry premiums. For Zava’s high-tech accessories,

availability improves with opportunities to dual-source pin-compatible options.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
MCU lead time (demo)	12–16 weeks	-1w	-6w	High
Sensor module ASP	\$3.10	-0.5%	-4.0%	Medium
Allocation status	Low	↔	↓	Medium

Drivers & risks

• Driver: Foundry capacity rebalanced to MCUs from bleeding-edge nodes

• Driver: Distributor inventories healthier; broad-market demand mixed

• Risk: Sudden design wins can whipsaw niche SKUs

• Risk: Package substitutions can invalidate certifications if unmanaged

Implications for Zava

• Accessory builds less likely to slip for silicon; buffer can be reduced modestly

• Pin-compatible alternates lower risk in seasonal ramps

Watchlist

• PCBA house cycle times around holiday peaks

• Notices on EOL/LTB for older MCU families

Recommended actions

• Approve two pin-compatible MCU alternates per board

• Move critical sensors to 13-week rolling forecasts with disti commits

• Bake in automated incoming tests for substituted packages

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Memory — DRAM & NAND — Q3 Market Brief

Brief ID: MB-2025Q3-MEMORY • Sentiment: Negative • Updated: 2025-08-25 • Region: Global • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

Memory pricing trends higher on producer discipline and AI-adjacent demand. DRAM spot moves

lead contract resets; NAND contracts lag but drift up. For Zava’s devices, BoM pressure is

moderate but real—optimize densities and avoid unneeded speed bins.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
DRAM spot (8Gb, de	\$2.45	+1.8%	+22%	Medium
NAND contract (per	\$46	+0.9%	+12%	Medium
Lead time (modules	10–12 weeks	↔	-3w	Medium

Drivers & risks

- Driver: Capacity prioritized to higher-margin parts; limited spot relief
- Driver: AI server demand tightens certain DRAM grades
- Risk: Sudden ASP jumps on constrained nodes
- Risk: Spec creep in consumer devices inflates BoM without visible benefit

Implications for Zava

- Retail device margins sensitive to density selections
- Promotional bundles should avoid top-bin memory SKUs

Watchlist

- Contract resets at quarter boundaries
- Vendor guidance on wafer starts and utilization

Recommended actions

- Standardize on 2–3 memory options per platform; pre-qualify alternates
- Right-size capacities for actual use; avoid over-spec in entry SKUs
- Negotiate index-based clauses with quarterly caps

Plastics for Housings — Polycarbonate / ABS — Q3 Market Brief

Brief ID: MB-2025Q3-RESINS • Sentiment: Neutral • Updated: 2025-08-25 • Region: APAC → NA • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

PC and ABS pricing is stable with improved availability. Lead times are predictable; specialty

grades (UV, flame-retardant) carry modest premiums. For Zava’s tech housings and wearables,

focus turns to cosmetic yield and assembly fit to protect margin.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
PC contract (demo)	\$2.85/kg	+0.6%	+4.8%	Medium
ABS contract (demo)	\$1.95/kg	+0.3%	+2.2%	Medium
Mold lead time	3–4 weeks	↔	-1w	Low

Drivers & risks

• Driver: Steady upstream aromatics; plant turnarounds largely completed

• Driver: Better utilization at molders improves slot availability

• Risk: Color-match rework can extend cycle time

• Risk: Flame-retardant additives add cost and can complicate recycling claims

Implications for Zava

• BoM stability allows focus on yield and scrap reduction

• Marketing claims around recycled content should align with grade specs

Watchlist

• Large outage notices at regional producers

• Molder queue length >7 days

Recommended actions

• Lock cosmetic masterbatch early; run first-article approvals on two lots

• Add simple go/no-go gauges for snap-fit features to reduce rework

• Keep FR grades limited to SKUs with a real compliance need