

COMPETITOR RESEARCH REPORT

CLIENT

Sacred Valley Tech UG

CREATED ON

08/05/2026

PRODUCT

Sally – Circular Fashion

PRICE

\$349

Competitor Analysis: Sacred Valley Tech (Sally)

Overview

Competitor	Pricing (estimated)	Core Focus	Main Gap for Sally
Retraced	€15K-150K+/year	Supply Chain Compliance + DPP	DPP module available — but enterprise-only, no consumer interface
EON Group	\$50K-500K+/year	Enterprise Digital IDs for luxury fashion	Enterprise only — no self-service, no SME offering
Reflaunt	Setup + Revenue Share	White-Label Resale (luxury)	No DPP, no lifecycle data
Trustrace	\$15K-150K+/year	Supply Chain Traceability (fashion)	DPP in development, has announced mid-size offering
Sally (SVT)	B2B: n/a / B2C: on a waitlist	Circular Fashion + DPP (SME)	(Not yet launched — B2B currently in pre-sale with no announced launch date)

Market Context (TAM/SAM/SOM)

Data synthesized from public market analyses (Grand View Research, Allied Market Research, EURATEX, Eurostat, EU ESPR Regulation 2024/1781).

Metric	Value	CAGR	Source
TAM Circular Fashion Software (global)	~\$4.2-5.8B (2024)	18-22%	Market synthesis
TAM Europe	~\$1.4-2.0B (2024)	—	~30% of global market
SAM DPP Software Europe	~\$175-300M (2024)	30-38%	DPP-specific segment
SAM DPP Europe 2030E	~\$1.3-2.5B (2030E)	30-38%	

Metric	Value	CAGR	Source
			EU ESPR regulation as driver
Number of fashion companies EU	~130,000-160,000	—	EURATEX (99% SME)
Number of fashion companies DE	~1,300-1,500	—	Textiles & Apparel (90-93% SME)
SME share without DPP solution	~90-95%	—	Estimated (Trustrace also serves mid-size)

Regulatory driver: EU ESPR Regulation (2024/1781) comes into force in phases. DPP mandate for textiles expected 2027-2030 via delegated acts. Affected: All manufacturers and importers in the EU (exemption: micro-enterprises).

Feature Comparison: Sally vs. Competitors

Feature	Sally	Retraced	EON Group	Reflaunt	Trustrace
Digital Product Passport (DPP)	Planned (pre-sale)	Yes (Series A funded)	Yes (Enterprise)	No	In development
Consumer app (QR scan)	Planned	No	No	No	No
Resale / handover	Planned	No	Yes (via Exchange)	Yes (core product)	No
Supply Chain Traceability	No	Yes (core product)	Yes (Product Cloud)	No	Yes (core product)
Self-service / transparent pricing	Aimed for	No ("Book Demo")	No ("Request Demo")	No ("Contact Sales")	No ("Contact Sales")
SME-ready (<€10K/year)	Aimed for	No	No	No	Mid-size announced

Feature	Sally	Retraced	EON Group	Reflaunt	Trustrace
AI item recognition (photo)	Planned (app)	No	No	No	No
German language	Yes	Yes	No (English)	No (English)	No (English)
API/ developer ecosystem	Unknown	No (closed)	No (Exchange = partners)	No	No (closed)
Live / on the market	On a waitlist — no price, no launch date	Yes (150+ brands)	Yes (Coach, H&M)	Yes (Balenciaga)	Yes (Adidas, ASOS)
Reference customers (fashion)	None named	Tom Tailor, Marc O'Polo	Coach, Chloé, H&M	Balenciaga, Ganni	Adidas, ASOS, Primark

Pricing Methodology

Pricing estimates follow a triangulation method: (1) headcount × industry ARPU (\$50K-200K/employee), (2) funding round analysis × typical multiple (8-15× ARR for ESG SaaS), (3) customer profile analysis (Enterprise vs. SME), (4) industry benchmarks (TextileGenesis €10K-200K, Worldly \$15K-250K, Carbon Trail \$3K-75K).

Limitation: None of the four competitors publishes prices. All estimates are directional.

Sally itself

Sacred Valley Tech (UG, Cologne, founded by Paolo Coda & Luca Urlacher) develops the product “Sally” in two areas:

A) Consumer App (B2C) — Currently on a waitlist, not live: - Promised: clothing swap (swap credits), AI capture via photo, later selling/repair - **No confirmed price, no launch date, no live product** - The website shows a waitlist/signup — no working service

B) B2B Infrastructure — In development / pre-sale: - Digital Product Passports + QR codes planned - No launch date, no reference customers - Accelerator partners: Ignition, PioneerLab, Impact Hub Berlin, Circular Valley

Critical positioning question: If Sally is not live yet and Retraced already has a DPP module (Series A funded), how can Sally still win?

Sally's clear differentiation (against Trustrace mid-size & Retraced DPP)

Why would an SME choose Sally over Trustrace's cheaper mid-size tier (approx. \$15K-50K/year)?

Typical SME purchase criterion	Trustrace (Mid-Size)	Retraced (Enterprise)	Sally (targeted)
Price/year	\$15,000-50,000	€15,000-150,000+	Targeted <€5,000
Consumer app for end customers	No	No	Yes (planned)
German language	No (English)	Yes	Yes (DE-native)
Self-service / no sales call	No	No	Yes (targeted)
AI item recognition via photo	No	No	Yes (planned)
Fast integration (<1 day)	No (ERP/PIM integration)	No (supplier onboarding)	Targeted
Focus on consumer circularity	No (traceability)	No (compliance)	Yes (core product)

The answer: The SME does not choose Sally because of a “better DPP”, but because of:

1. **Price** — Trustrace costs \$15K-50K. Sally will likely aim for <€5K (derived from B2C pricing positioning) 2. **Consumer app** — No other provider gives the SME a tool to communicate with ITS end customers (QR scan → care, repair, resale). That is the real USP. 3. **Germany** — A German-based company in Cologne, German-speaking, GDPR-compliant, German-native support = a key buying factor for German fashion SMEs 4. **Simplicity** — Self-service vs. sales call. The SME has no IT team for ERP integration.

Risk of this differentiation: Trustrace could price its mid-size offering further down. Retraced could build a light version. Sally's differentiation is price-dependent and time-critical.

Competitor 1: Retraced

Positioning

Retraced (founded 2019, DE) — “AI-first platform for fashion & textile supply chain compliance.” 150+ Brands, 25K+ Suppliers, ISO 27001. Core: AI-powered Certified Materials Management + Supply Chain Traceability.

DPP Module

Retraced HAS a DPP module. According to Net Zero Compare 2024 and its own communication, the DPP module was developed and funded as part of the Series A (2024). It is not just a “compliance reference” — it is a productive module.

Significance for Sally: This significantly weakens Sally’s core USP (“no competitor has DPP”). The remaining difference: Retraced’s DPP is enterprise-focused (no self-service, no consumer interface). Sally’s consumer app approach remains differentiating — but only if Sally goes live before Retraced’s DPP expands into the SME market.

Pricing

Not public. Estimated: entry ~€15K/year, Enterprise up to €150K+/year.

Customer pain points

- (neg) Manual certificate reconciliation
- (neg) Compliance documentation as “fire drill”
- (neg) Supplier onboarding required
- (neg) Enterprise focus: no self-service, no transparent pricing
- (neg) No public customer reviews on major platforms (GetApp: 0) — limited independent validation
- (pos) AI certificate management as industry benchmark
- (pos) DPP module available and Series A funded

Gap for Sally

No consumer interface, no self-service, no transparent pricing for SMEs. Sally’s planned consumer app approach + DPP remains differentiating — but the time window is limited, as Retraced (with Series A) can expand into the SME market.

Competitor 2: EON Group

Positioning

EON (founded 2016/2017, NYC) — “World’s first CRM for products.” Enterprise Digital ID platform for luxury fashion. Customers: Coach, Chloé, H&M. With Microsoft Azure + CIRPASS-2.

Pricing

Not public. Estimated: entry \$50K-150K/year, large accounts \$200K-500K+/year.

Customer pain points

- (neg) No self-service — only “Request Demo”
- (neg) Vendor lock-in (proprietary IDs)
- (neg) Practically inaccessible for SMEs
- (neg) Founding year unclear (2016 and 2017 in different sources)
- (neg) No public customer reviews found — enterprise-only motion limits independent validation
- (pos) Strongest brand power (Coach, Balenciaga, H&M)
- (pos) Most extensive partner ecosystem (Exchange)

Gap for Sally

No SME solution. EON only serves Enterprise. Sally’s self-service approach targets this gap — but must go live before EON’s potential downmarket expansion.

Competitor 3: Reflaunt

Positioning

Reflaunt (founded 2019, London/Singapore) — White-Label “Resale-as-a-Service” for luxury fashion. Customers: Balenciaga, Ganni, Harvey Nichols. 27+ Marketplaces.

Pricing

Not public. Setup fee + Revenue Share (20-40%). Customers net 40-60%.

Customer pain points

- (neg) Low effective payouts (40-60% net)
- (neg) Slow processing (1-3 weeks until listing); customers report long assessment periods
- (neg) Automatic price reductions of up to 30% after 30 days unsold (confirmed in Reflaunt's own replies)
- (neg) Return fees for rejected items
- (neg) Only 5 countries (US/UK/FR/IT/SG)
- (neg) Customer reviews report payment delays and weak communication in some cases (Trustpilot 4.1/5, 349 reviews)
- (pos) Strongest brand partnerships in resale
- (pos) Strong customer-service reputation overall (61% 5-star on Trustpilot)

Gap for Sally

No DPP, no lifecycle data. Sally could integrate as a DPP layer. Partnership opportunity, not direct competition.

Competitor 4: Trustrace

Positioning

Trustrace (founded 2016 as Tex.tracer, Stockholm) — Supply Chain Traceability for fashion/footwear. 130+ employees, \$30M funding over 5 rounds. Customers: Adidas, ASOS, Primark, Lululemon.

Mid-Size Offering

Trustrace announced in 2024 that it would also serve mid-size brands. This weakens the SME-gap argument. The ready-to-use SME offering is already available. Sally's competitive advantage in the SME segment is therefore no longer exclusive.

Pricing

Not public. Estimated: SME ~\$15K-50K/year, Enterprise ~\$100K-150K+/year.

Customer pain points

- (neg) Implementation complexity
- (neg) Supplier onboarding time-consuming — reviewers note onboarding effort can slow early time-to-value
- (neg) No public API/developer portal
- (neg) No public pricing transparency — frustrates procurement benchmarking
- (neg) Supplier data-collection burden can become a bottleneck without strong buyer governance
- (pos) Largest supplier base (112K+)
- (pos) Broadest regulatory coverage
- (pos) Strong Gartner Peer Insights score (4.6/5, 7 reviews)

Gap for Sally

No API ecosystem. DPP in development (no live reference yet). Sally could score with an open API approach — but Trustrace is getting closer in the mid-size segment.

Summary

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Trustrace	\$15K-150K+/year	Supply Chain Traceability (fashion)	DPP in development, no open API

Sally (SVT)

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	B2B: n/a / B2C: waitlist	Circular Fashion + DPP (SME)	(Not yet launched — but the only provider with consumer app + SME price)

Key insight: The market for Digital Product Passports is growing at 30-38% CAGR, driven by the EU ESPR Regulation. Retraced and Trustrace are the strongest competitors, but none offers an affordable solution for small fashion companies — exactly where Sally’s opportunity lies.