

REAL CHANGE IN 2025: WHAT MATTERS FOR SUSTAINABLE LUXURY

**IN THE LAST 12 MONTHS
WE'VE HELPED OVER 100 LUXURY BRANDS
MEET HIGHER STANDARDS FOR PEOPLE,
NATURE & BUSINESS...**

**THIS REPORT SHARES WHAT OUR EXPERTS
HAVE LEARNT ABOUT REAL CHANGE
– AND WHAT IS NEEDED TO MAKE
PROGRESS IN 2025.**

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INTRODUCTION

**“NEVER HAS
THE BUSINESS
CASE FOR
SUSTAINABILITY
BEEN CLEARER,”**

Amy Nelson-Bennett,
CEO, Positive Luxury

Amidst all the talk of economic and political uncertainty past, present and future, there is one certainty we in the corporate world can count on. Climate-driven disruption will continue to flex its muscle – impacting each of us as consumers and professionals, inside our businesses and across our supply chains. One continent is responding with an unprecedented wave of legislation designed to force action, another will deregulate and leave the responsibility for real change with business. With the cost of inaction recognised by a majority of CEOs as 2030 looms into view, an equal majority are unprepared for scrutiny of their ESG-related practices: never has the business case in favour of sustainability been clearer. Headwinds or tailwinds, opportunity or risk, smart leaders across the luxury industry will look adversity in the eye and defy it by prioritising activities that provide four-for-the-price-of-one: climate resilience, compliance, cost savings, and consumer-facing credibility.

At Positive Luxury in 2024, we have been fortunate to advise and champion hundreds of luxury brands of all shapes and sizes doubling down in favour of the future. This despite a slowdown across the industry which – excluding the impact of the covid pandemic – we haven’t faced since the financial crisis of 2006. Thank you to all the amazing companies we’ve partnered with who kept responsibility on their corporate agenda in 2024 and succeeded in delivering real change: from Balmain Beauty to Bav Tailor, Cecilie Bahnsen to St Regis, Canned Wine Co to Koraru, Edition Hotels to Erdem, Mejuri to Mastercard, Monica Vinader to Marbella Club, Roja Parfums to The Rug Company, U Beauty to Zenpack. Our community’s commitment to transformation provides ample reasons for optimism.

The forecast for 2025 is a bit less cloudy, but will remain challenging. After three years of price-led growth, aspirational and affluent luxury consumers see a value gap which, alongside economic conditions, has shifted perceptions of luxury brands toward that of an empty suit. The appetite for luxury is not infinite, nor

are our resources. It’s time to stop moving the same old pieces around the board, and inject some serious substance back into the game. 2025 will provide the space for every luxury brand to reconnect with the founding principles of luxury, and from that vantage point craft a more creative, compelling and substantive vision for the future. For very practical climatic reasons sustainability must be a central part of that vision, and any business that slows or halts their investment of time and resources on responsible business practices will have lost its survival instinct.

That is why we’ll spend the year ahead getting very personal with every business we support to ensure they make forward progress. We’ll work creatively and commercially with each to focus time and funds on those four-for-the-price-of-one initiatives that reduce impact and risk in the near- and mid-term, to provide a pathway through the web of regulatory compliance, provide clear direct and indirect return on investment, cement employee loyalty and – above all – once again inspire consumers.

In addition to the pressing need in 2025 to reduce energy consumption, water usage and waste, we'll be embracing AI in our own business to become more productive and encouraging others to do the same, promoting circular business practices and business models, demanding upstream visibility and the ethical treatment of workers, and pushing hard for nature positivity. We expect to combat greenhushing as much as greenwashing as the force of green claims codes is felt. Out of this challenge lies a golden opportunity for brand managers to connect the dots between the value of their sustainability progress to nature and society, the rise in pre-purchase consumer research and the time-honoured tradition of luxury storytelling.

Will 2025 be challenging? Undoubtedly. But out of that adversity will rise the truly resilient, those that spot opportunity and harness it for the good of nature, society and business. Real change, real creativity and real courage are the fundamental ingredients required to repair trust with a jaded luxury consumer, inject the substance that is inherent value in the luxury proposition and protect the future of your business. It's the silver linings playbook. And we strongly recommend adopting it.



Amy Nelson-Bennett
CEO, Positive Luxury



OUR GLOBAL REAL CHANGEMAKERS: CLASS OF 2024

Positive Luxury's Real Changemakers are a community of over 170 brands, retailers and suppliers across the globe. They work with us to become luxury sustainability leaders, valuing progress over perfection, difficult work over easy wins – and are united in taking action to meet higher and higher standards for people, nature and business.

NORTH AMERICA

AERA
ALTERRE
ANNE SISTERON
ARETE
ARMENTA
BALMAIN BEAUTY
ENSEMBL
FORBES & LOMAX
HOLISTIC SPIRITS
ILES FORMULA
KBH JEWELS
KNESKO SKIN
LEVERDEN
LÖF
MEJURI
NANI PUA
OCEAN+MAIN
OPUS ONE WINERY
PIPER & SKYE
PYRRHA
SIMPLY ORGANIC BEAUTY
SMILING ROCKS
TOM FORD BEAUTY
U BEAUTY
UPPER DISTRICT
VERANDAH
VERLAS
WE-AR4
WOLF
ZENPACK

CENTRAL & SOUTH AMERICA

CELOSA TEQUILA
CLASE AZUL
PREMIUM SUAVE TEQUILA

EUROPE

ANEKA
AYUNA
BELVEDERE VODKA
CARL SUCHY & SOHNE
CECILIE BAHNSEN
CHARABANC
CHÊNE BLEU
COURVOISIER
DAUMET
DR.LIPP
ENSO TIMELESS
ETRO
IF ONLY IF NIGHTWEAR
IGNAE
ILES FORMULA
KAMA AYURVEDA
LA VERRIÈRE
LAYESION
LE GRAND BELLEVUE
LEONORI
LIVRARIA LELLO
LOLA&LYKKE
MAES PARIS
MARBELLA CLUB
MCM
MEADOW
NOMADISSEM
P448
RON MATUSALEM
SEABODY
SEPAI
SKINCYCLES
STUDIO TONDINI
THE GREENCOVE
UNSAID
VALEXTRA

UK

111SKIN
AIMEE ANN LOU
AJA BOTANICALS
ALIGNÉ
ALLECT
ANNOUSHKA
ANYA HINDMARCH
ARENA FLOWERS
ARGENTUM APOTHECARY
AUGUSTA & GEORGE
BAMFORD
BAV TAILOR
CANDACRAIG
CANNED WINE CO.
CHARLOTTE CORNELIUS
COCO DE MER
CULT MIA
DANIELLA DRAPER
DAVID COLLINS STUDIO
DOMUS NOVA
DOMUS STAY
E'LHAA
EMMY LONDON
ERDEM
FLEMING HOWLAND
FLEMINGS MAYFAIR
FORBES & LOMAX
GARRARD
HARVEY NICHOLS
HOME GROWN
HOME HOUSE
INLIGHT BEAUTY
IRENE FORTE SKINCARE
JORO
LA MAISON COUTURE
LK BENNETT
LOLA'S APOTHECARY
LONDON & AVALON
MATILDE JEWELLERY
ME+EM

MILLER HARRIS
MODERN SYNTHESIS
MOLLY BROWN LONDON
MONICA VINADER
NEEDLE & THREAD
NEW AND LINGWOOD
OCHRE
OLIVER BURNS STUDIO
OUSHABA
PETER REED
RAPPORT LONDON
ROJA PARFUMS
ROMILLY WILDE

MIDDLE EAST

ENSO TIMELESS
KINTSUGI

ASIA

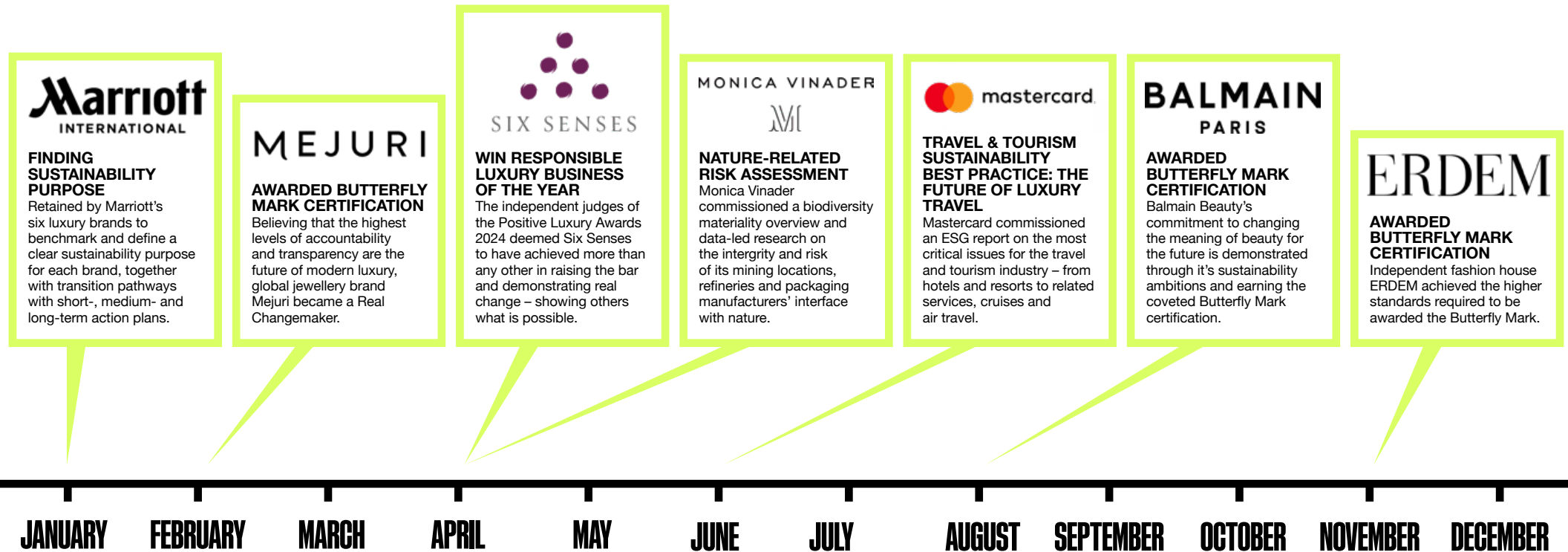
ARANYANI
BBASE
CARIUMA
FOUNDERS BEAUTY
IVAR
KORARU
LIMELIGHT DIAMONDS
LUX* SOUTH ARI ATOLL MALDIVES
STORY WEAR
THE FUTURE ROCKS
VERANDAH

AUSTRALIA & NEW ZEALAND

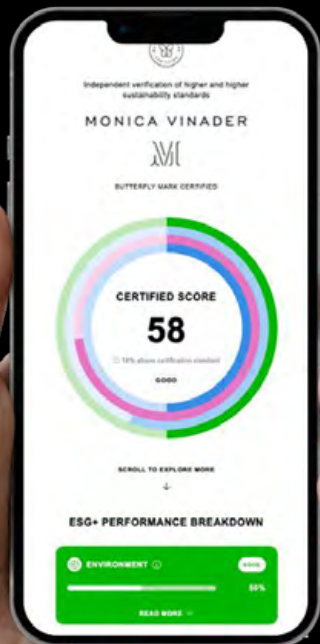
ALLEIJA
CLAUDE & ME
GODAVARI DIAMONDS
HELEN KAMINSKI
KAEA

2024 POSITIVE LUXURY CLIENT HIGHLIGHTS

In 2024 we helped 36 luxury brands earn the prestigious Butterfly Mark certification, and helped many others with of bespoke sustainability consultancy or projects. Here is a small selection of highlights from the last 12 months.



TRAILBLAZING TRANSPARENCY: USING THE CONNECTED BUTTERFLY MARK



The Connected Butterfly Mark (CBM) is a digital brand passport that allows a luxury business to quickly and transparently communicate their verified sustainability performance to stakeholders. Our Real Changemakers use the passport online on their product or sustainability pages, or via QR code on packaging and instore. This allows consumers to make more informed decisions about the products they choose – and understand how a business performs in areas such as climate, nature and water, how they treat workers and communities, as well as how responsibly and ethically they run their business. It shows exactly what they scored in our assessment and what other certifications they hold.

Over 100 luxury business are using the CBM to build trust with stakeholders – and show the world what real change looks like:

111SKIN
AERA
AIMÉE ANN LOU
ALBIVA
ALLECT
ALTERRE
ANNE SISTERON
ANNOUSHKA
ARENA FLOWERS
ARGENTUM APOTHECARY
AUGUSTA & GEORGE
AYUNA
BAMFORD
BAV TAILOR
BELVEDERE VODKA
CALLEIJA
CANDACRAIG
CANNED WINE CO.
CARIUMA
CARL SUCHY & SÖHNE
CECILIE BAHNSEN
CELOSA TEQUILA
CHARABANC
CHARLOTTE CORNELIUS
CHENE BLEU
CLASE AZUL MÉXICO
CLAUDE & ME
COCO DE MER
COURVOISIER
CULT MIA
DANIELLA DRAPER
DAUMET
DAVID COLLINS STUDIO
DOMUS STAY
DR LIPP
EMMY LONDON
ERDEM
FLEMING & HOWLAND
FOUNDERS BEAUTY

GODAVARI
HELEN KAMINSKI
HOME GROWN
HOME HOUSE
IGNAE
ILES FORMULA
INLIGHT BEAUTY
IOTA
IRENE FORTE
IVAR
KAEA
KAMA AYURVEDA
KBH JEWELS
KNESKO SKIN
KORARU
LA MAISON COUTURE
LA VERRIERE
LE GRAND BELLEVUE
LEONORI
LEVERDEN
LIMELIGHT DIAMONDS
LIVRARIA LELLO
LK BENNETT
LOLA&LYKKE
LONDON & AVALON
MAISON MAES
MARBELLA CLUB
MATILDE JEWELLERY
MCM
MEJURI
MILLER HARRIS
MOLLY BROWN LONDON
MONICA VINADER
NEEDLE & THREAD
NOMADISSEM
OCEAN+MAIN
OLIVER BURNS
OUSHABA
PIPER & SKYE

PYRRHA
ROMILLY WILDE
RON MATUSALEM
SARAFUMI
SEABODY
SEPAI
SIMPLY ORGANIC BEAUTY
SMILING ROCKS
SMYTHSON
SONIA PETROFF
STEPHEN EINHORN
STEPHEN WEBSTER
STORY WEAR
SUAVE TEQUILA
TATEOSSIAN
THE GLENTURRET
THE GREENCOVE
THE MACALLAN
THE OTHER HOUSE
THE RUG COMPANY
THE UNIVERSAL SOUL
COMPANY
U BEAUTY
UNSAID
UPPER DISTRICT
VALEXTRA
VERANDAH
VERLAS
WE-AR4
WEST CORK DISTILLERS
WILD BEAUTY
ZENPACK
ZONE CREATIONS

Positive Luxury AWARDS 2024

The Positive Luxury Awards exist because we believe that the luxury industry has a vital role to play driving real, positive change for the good of all, setting new standards and creating new norms.

Our 2024 applicants and Shortlist stood out for their spirit of innovation and impressive progress. The winning businesses exemplify what true luxury looks like, demonstrating that they are at the forefront of the industry, inspiring and galvanising others to take serious, positive action. Their example will continue to help shape a more sustainable future for people, nature and business.

WINNERS

**RESPONSIBLE LUXURY
BUSINESS OF THE YEAR:**
SIX SENSES

**FASHION BUSINESS
OF THE YEAR:**
BAV TAILOR

**JEWELLERY BUSINESS
OF THE YEAR:**
MONICA VINADER

**BEAUTY BUSINESS
OF THE YEAR:**
MEDIK8

**INTERIORS BUSINESS
OF THE YEAR:**
ALLECT DESIGN GROUP

**TRAVEL BUSINESS
OF THE YEAR:**
SIX SENSES

**PREMIUM DRINKS
BUSINESS OF THE YEAR:**
CANNED WINE CO.

SHORTLISTED

**RESPONSIBLE LUXURY
BUSINESS OF THE YEAR**
Drake & Morgan /
Metropolitan Touring /
Monica Vinader / Six Senses

**FASHION BUSINESS
OF THE YEAR**
BAV TAILOR / Cleobella
/ Cult Mia / Lola&Lykke

**BEAUTY BUSINESS
OF THE YEAR**
AYUNA / Medik8 / Molton
Brown / Neal's Yard Remedies

**JEWELLERY BUSINESS
OF THE YEAR**
Daniella Draper / Mejuri /
Monica Vinader / Skydiamond

**TRAVEL BUSINESS
OF THE YEAR**
Candacraig / Marbella Club
Hotel / Room2 / Six Senses

**PREMIUM DRINKS
BUSINESS OF THE YEAR**
Canned Wine Co. /
Clase Azul Mexico /
Hennessy / The Glenturret

**INTERIORS BUSINESS
OF THE YEAR**
Allect Design Group /
Graphenstone Paint /
MAIE / Studio Neon Attic

THE JUDGES

Lucy Harris
Mickey Alam-Khan
Ure Utah
Mary Fellowes
Rosalie Mann
Sara Kozlowski
Iris Van der Veken
Mads Twomey-Madsen
Rebecca Butler
Alexander Johnston
Lisa Oxenham
Millie Kendall
Angel Tan
Christian Bachler
Penny Sainsbury
Eloise Hanson
Glenn Mandziuk
Sue Williams
Chrystal Webster
Julien Lonneux
Tony Cleary

REAL CHANGE IN 2025: WHAT MATTERS FOR SUSTAINABLE LUXURY



PART 1: THE BUTTERFLY EFFECT

OUR REAL CHANGEMAKERS' HIGHER STANDARDS IN 2024

HIGHER STANDARDS: HOW WE SCORE

RANKINGS AND ESG+ 1.0 SCORING METHODOLOGY

The performance rankings illustrated in this report are based on the scoring methodology applied in Positive Luxury's ESG+ 1.0 assessment framework.

Assessment questions vary by business model and luxury sector across all pillars and drivers – tailored to reflect the impacts, risks and opportunities unique to each.

Performance is measured on a scale of 0 to 100, weighted to reflect best practice for SMEs and large businesses. For each of the 29 drivers in the assessment, 100 is the maximum score possible, weighted to reflect the level of materiality and determined by the answers and evidence provided.

Driver scores are then weighted by materiality for SMEs and large businesses to create pillar scores for Environmental, Social and

Governance, and then pillars are weighted again in the same manner to create an aggregated score. To earn the sought-after Butterfly Mark certification, a business must achieve a minimum of 50 in each of the Environmental, Social and Governance pillars. As the Butterfly Mark is a living trust mark, they must then be recertified every two years – and must evidence performance improvement in each of the three pillars.

Our ESG+ Framework: drivers of sustainability



HIGHER STANDARDS: HOW WE SCORE

STANDARDS: ESG+ 2.0

To ensure clients are meeting ever higher standards, we update our framework every two years. Since December 2023 brands we support have been undergoing assessment on our ESG+2.0 platform. This latest world-leading framework is built upon the foundation of international agreements, frameworks and standards and is aligned to the rigorous CSRD adopted by the EU, and reporting frameworks for disclosure such as GRI, SASB, TCFD and TNFD, as well as global goals such as the UN's Sustainable Development Goals. Our smartest platform, it also uses dynamic tailoring to ensure it is always 100% bespoke and relevant for your business size, type and location. More information can be [found here](#).

RAISING THE BAR: ESG+ 3.0

Early in 2025 we begin our partnership with Briink, an AI-powered ESG solutions provider, to start delivering tools that will transform how luxury brands approach ESG assessments and reporting. As the demand for transparent and robust data continues to grow, we empower brands to meet these challenges effectively, enhancing their ability to collect, analyse, and act on ESG data with precision and efficiency. And we have already commenced work on the next generation of our assessment framework and platform due for launch by the end of 2025. With legislative requirements and reporting taking up an increasing share of company resources, ESG+ 3.0 will strengthen the support and tools our industry needs as CSRD expands out to non-EU brands and SMEs, green claims codes and PPWR come into force, and EPR, eco-design and other circularity-led initiatives take shape.



PROGRESS OVER PERFECTION: 2024 LEARNINGS

1 PREMIUM DRINKS

MOST FRAGILE SECTOR MAKING GREAT STRIDES

Arguably the most fragile of the luxury sectors – being so dependent on nature related impacts such as water, climate and soil – it is also our average highest scoring sector overall. It has made great strides in Governance and Human Rights, but Water and Sustainable Sourcing are still challenges to be worked on.

2 TRAVEL & HOSPITALITY

LATE TO THE PARTY, BUT MAKING UP FOR LOST TIME WITH THE BIGGEST GAINS

The industry fell behind during Covid and has been slow to get started – evidenced by having the lowest average baseline scores at the start of their sustainability journey with us. But the sector is rallying, the results showing that when sustainability is prioritised, the resulting transformation outscores any other sector – particularly taking actions on critical areas such as Waste. Travel & hospitality becomes our second highest average scorer – and overall the category that is showing the biggest improvement.

3 BEAUTY & FRAGRANCE

BEAUTY SITS PRETTY BUT ISN'T STANDING UP

Beauty brands start from a more sustainable baseline score than any other sector, but the industry finds it harder to move the needle and progress to make more positive impact. It shows the least transformation of all our categories. Despite showing good improvements in the important areas such as Packaging, DE&I, the beauty industry has many more challenges to overcome in 2025.

4 FASHION & ACCESSORIES

OK PROGRESS, BUT SO MUCH MORE TO DO

The fashion sector sits in the middle of our rankings. We are seeing excellent scores from brands in Circular Economy, which is encouraging. But in many key areas brands are lagging. In fact, across all our industry sectors, there is only one fashion brand in our Governance top 10, one in the Environment pillar top 10 – and none in our Social pillar top 10 scorers.

5 JEWELLERY & WATCHES

MUST WORK HARDER TO KEEP THEIR SHINE

Like beauty, the industry has made real progress and starts its sustainability journey with us from higher standards – but it needs to work a lot harder in the areas that matter most. It needs to make up ground with big transformations in Human Rights, Ethical Practices and Sustainable Sourcing.

6 INTERIORS & LIVING

SLOW STARTERS BUT SHOW IMPRESSIVE IMPROVEMENT CAN BE MADE

The interiors sector faces similar sustainability challenges to fashion, but hasn't received the headlines. From a low base, those leading the way are quick to make the real changes necessary – driving an impressive 82% improvement. Despite this improvement, the sector is still at the bottom of our industry average scores.

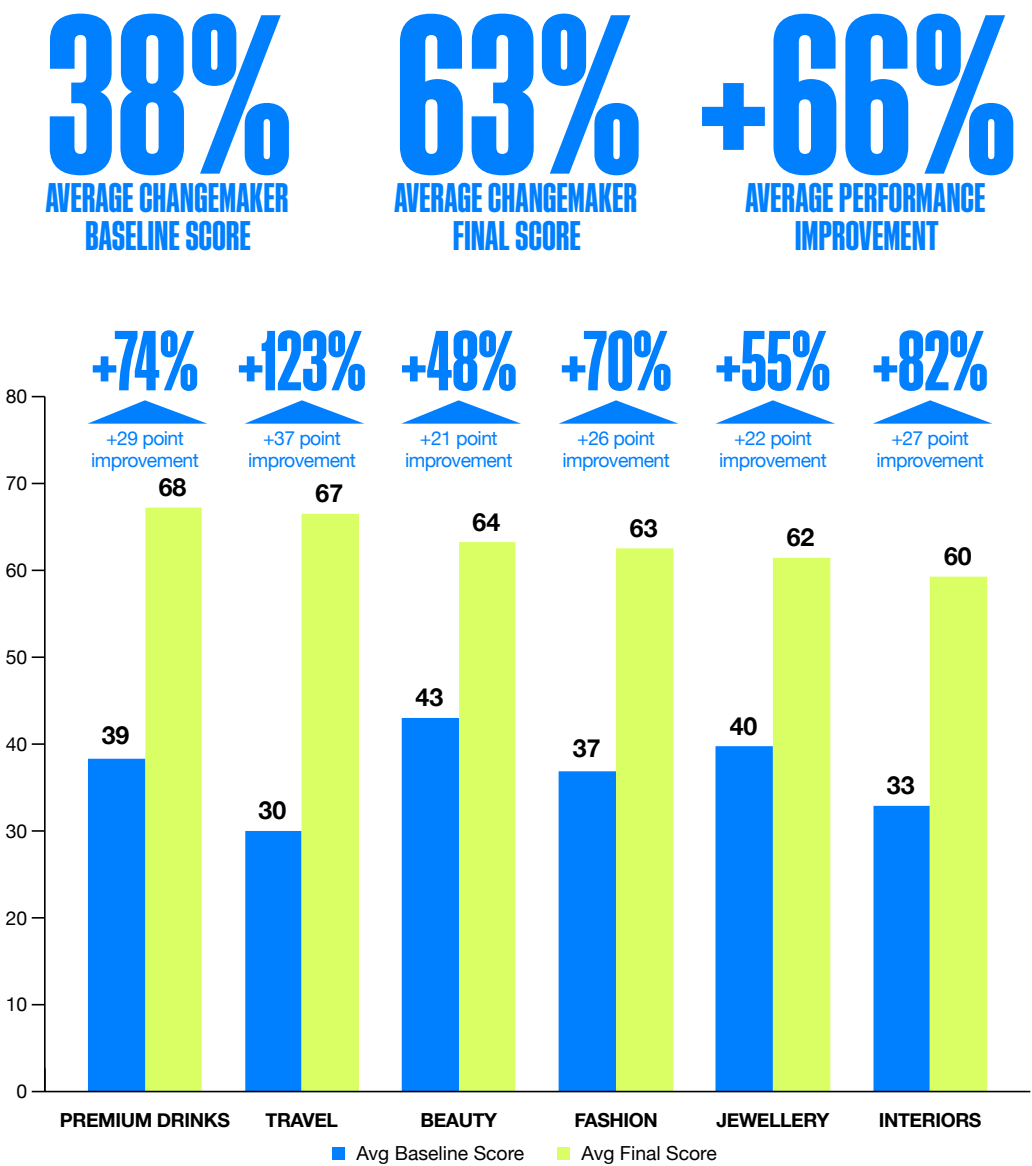
REAL CHANGE IN NUMBERS



The following data summarises the transformation of our certified brands on the ESG+ 1.0 assessment up to the end of November 2024.

In a world of tokenistic gestures and claims of perfection, it’s difficult to know who’s making an impact you can trust. That’s why the Butterfly Mark certification is only ever awarded to brands meeting higher and higher standards for people, nature and business.

We look at how our brands performed on individual drivers such as climate, nature, water, how they treat their workers and communities and how responsibly and ethically they run their business. Every company undergoes a baseline assessment to identify gaps across each pillar of ESG, enabling the business to improve practices and ultimately meet certification standards.



CHANGEMAKER INDEX: TOP SCORERS BY LUXURY SECTOR

To earn certification, a business must score a minimum of 50 in each of the Environmental, Social and Governance pillars – our certification standard. Discover which Real Changemakers scored the highest above this standard in our ESG+ 1.0 assessment.

OUR TOP 10 CHANGEMAKERS BY CATEGORY

BEAUTY <ol style="list-style-type: none">1. Kaea2. Kama Ayurveda3. U Beauty4. Albiva5. Rhug Beauty6. Miller Harris7. Bamford8. Tom Ford9. Founders Beauty10. Ayuna	JEWELLERY <ol style="list-style-type: none">1. Stephen Webster2. Smiling Rocks3. Garrard4. Daniella Draper5. Pyrrha6. Unsaid7. La Maison Couture8. Leonori9. IVAR10. Matilde	PREMIUM DRINKS <ol style="list-style-type: none">1. The Glenturret2. Belvedere Vodka3. Canned Wine Co.4. Courvoisier5. Chene Bleu6. Suave Tequila7. West Cork Distillers8. Clase Azul9. Celosa Tequila10. Ron Matusalem
FASHION <ol style="list-style-type: none">1. Needle & Thread2. Cariuma3. Ocean + Main4. Nomadisseem5. Aimee Ann Lou6. Alterre7. Verandah8. Bamford9. Smythson10. Aera	INTERIORS <ol style="list-style-type: none">1. The Universal Soul Company2. Arena Flowers3. Allect4. Bamford5. London & Avalon6. The Rug Company7. Fleming & Howland8. Oliver Burns Studio9. David Collins Studio10. Charabanc	TRAVEL & HOSPITALITY <ol style="list-style-type: none">1. The Other House2. Livraria Lello3. Candacraig4. La Verriere5. Home Grown6. Le Grand Bellevue7. Home House8. Nexus Polaris9. Domus Stay

TRANSFORMATION YOU CAN TRUST: THE BIGGEST IMPROVERS

The following Real Changemakers have shown the biggest score improvement between baseline assessment and final assessment – they worked hard, with Postive Luxury’s help, to be better in the areas that matter most and deliver the most impact.

OUR TOP 10 TRANSFORMERS BY CATEGORY

BEAUTY	^
1. Roja Parfums	+48pts
2. 111Skin	+41pts
3. Ignae	+33pts
4. Bamford	+30pts
5. Knesko	+29pts
6. Sepai	+27pts
7. Inlight Beauty	+26pts
8. Founders Beauty	+26pts
9. Leverden	+23pts
10. Miller Harris	+22pts

JEWELLERY	^
1. Claude & Me	+46pts
2. Molly Brown London	+45pts
3. Limelight Diamonds	+37pts
4. Daniella Draper	+34pts
5. Garrard	+32pts
6. Stephen Webster	+30pts
7. Leonori	+28pts
8. Pyrrha	+28pts
9. Oushaba	+27pts
10. IVAR	+27pts

PREMIUM DRINKS	^
1. Suave Tequila	+56pts
2. The Glenturret	+51pts
3. West Cork Distillers	+46pts
4. Ron Matusalem	+38pts
5. Chene Bleu	+38pts
6. Canned Wine Co.	+26pts
7. Clase Azul	+24pts
8. Courvoisier	+6pts
9. Belvedere Vodka	+2pts
10. Celosa Tequila	+1pts

FASHION	^
1. ERDEM	+56pts
2. Needle & Thread	+51pts
3. Cecilie Bahnsen	+49pts
4. Valestra	+45pts
5. LK Bennett	+41pts
6. Lola&Lykke	+41pts
7. Upper District	+40pts
8. Maison Maes	+38pts
9. Bamford	+35pts
10. We-ar4	+29pts

INTERIORS	^
1. David Collins Studio	+49pts
2. Bamford	+38pts
3. Fleming & Howland	+37pts
4. Allect	+31pts
5. The Rug Company	+28pts
6. The Universal Soul Company	+25pts
7. Charabanc	+23pts
8. Arena Flowers	+20pts
9. Oliver Burns Studio	+15pts
10. London & Avalon	-0.5pts

TRAVEL & HOSPITALITY	^
1. Home Grown	+57pts
2. Home House	+55pts
3. Nexus Polaris DMC	+52pts
4. Livraria Lello	+40pts
5. Le Grand Bellevue	+38pts
6. The Other House	+32pts
7. Candacraig	+28pts
8. Domus Stay	+27pts
9. La Verriere	0 pts

A GLOBAL VIEW

Discover the luxury brands in the following regions that scored the highest above our certification standard (a minimum score of 50 in each of the Environmental, Social and Governance pillars), and those that saw the biggest points improvement between baseline and final assessment.



USA

TOP 5 BRANDS (ABOVE STANDARD)

- 1. Smiling Rocks
- 2. U Beauty
- 3. ocean+main
- 4. Alterre
- 5. Tom Ford Beauty

BIGGEST TRANSFORMERS

- | | |
|------------------|--------|
| 1. Knesko | +29pts |
| 2. WE-AR4 | +29pts |
| 3. ocean+main | +27pts |
| 4. Smiling Rocks | +27pts |
| 5. Leverden | +23pts |

UK

TOP 5 BRANDS (ABOVE STANDARD)

- 1. Stephen Webster
- 2. The Glenturret
- 3. Needle & Thread
- 4. The Other House
- 5. Canned Wine Co.

BIGGEST TRANSFORMERS

- | | |
|--------------------|--------|
| 1. Home Grown | +57pts |
| 2. ERDEM | +57pts |
| 3. The Other House | +55pts |
| 4. Needle & Thread | +51pts |
| 5. The Glenturret | +51pts |

FRANCE

TOP 5 BRANDS (ABOVE STANDARD)

- 1. Kama Ayurveda
- 2. Courvoisier
- 3. Chêne Bleu
- 4. La Verrière
- 5. Unsaid

BIGGEST TRANSFORMERS

- | | |
|------------------|--------|
| 1. Maes Paris | +38pts |
| 2. Chêne Bleu | +38pts |
| 3. Kama Ayurveda | +20pts |
| 4. Unsaid | +6pts |
| 5. Courvoisier | +6pts |

ENVIRONMENT, SOCIAL & GOVERNANCE IMPACT

ENVIRONMENT

A company must evidence that throughout its full value chain it is operating with tangible respect for the natural world across 13 critical areas including climate change, pollution & waste management, biodiversity, water security and animal welfare.

36%
AVERAGE ENVIRONMENT
BASELINE SCORE

62%
AVERAGE ENVIRONMENT
FINAL SCORE

+26pts
AVERAGE IMPROVEMENT

TOP SCORERS (ABOVE STANDARD)	
1.	Stephen Webster
2.	Kaea
3.	Home Grown
4.	Candacraig
5.	Kama Ayurveda
6.	Livraria Lello
7.	Aimée Ann Lou
8.	Home House
9.	Smiling Rocks
10.	Unsaid

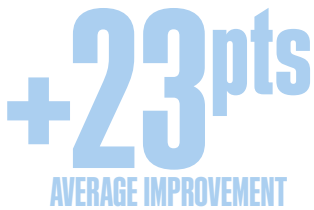
BIGGEST TRANSFORMERS (POINTS IMPROVEMENT)	
Home Grown	65pts
ERDEM	58pts
Home House	58pts
Cecilie Bahnsen	52pts
David Collins Studio	52pts
Suave Tequila	50pts
Claude & Me	50pts
Nexus Polaris DMC	49pts
Chene Bleu	49pts
Maes Paris	48pts



ENVIRONMENT, SOCIAL & GOVERNANCE IMPACT

SOCIAL

A company must evidence strong social relationships with employees and people in the communities across its value chain. We examine and demand the highest standards in seven critical areas such as diversity, equality and inclusion; community investment; and employee safety, fair pay and conditions throughout the supply chain.



TOP SCORERS (ABOVE STANDARD)	
1.	Stephen Webster
2.	Kaea
3.	Needle & Thread
4.	Smiling Rocks
5.	The Glenturret
6.	Courvoisier
7.	Livraria Lello
8.	The Universal Soul Company
9.	The Other House
10.	111Skin

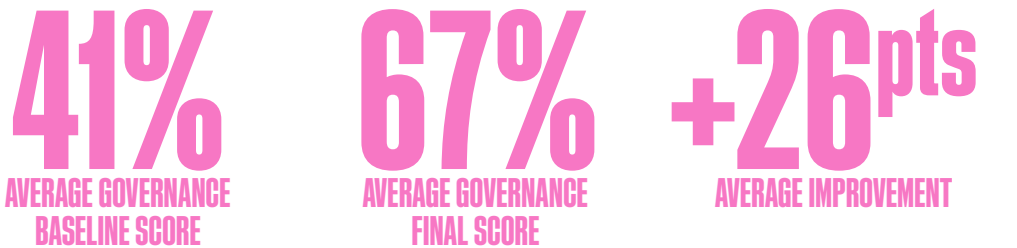
BIGGEST TRANSFORMERS (POINTS IMPROVEMENT)	
Aimée Ann Lou	64pts
Kama Ayurveda	60pts
Needle & Thread	58pts
Cecilie Bahnsen	54pts
Claude & Me	53pts
Suave Tequila	52pts
Molly Brown London	51pts
Maes Paris	49pts
La Maison Couture	46pts
Godavari Diamonds	46pts



ENVIRONMENT, SOCIAL & GOVERNANCE IMPACT

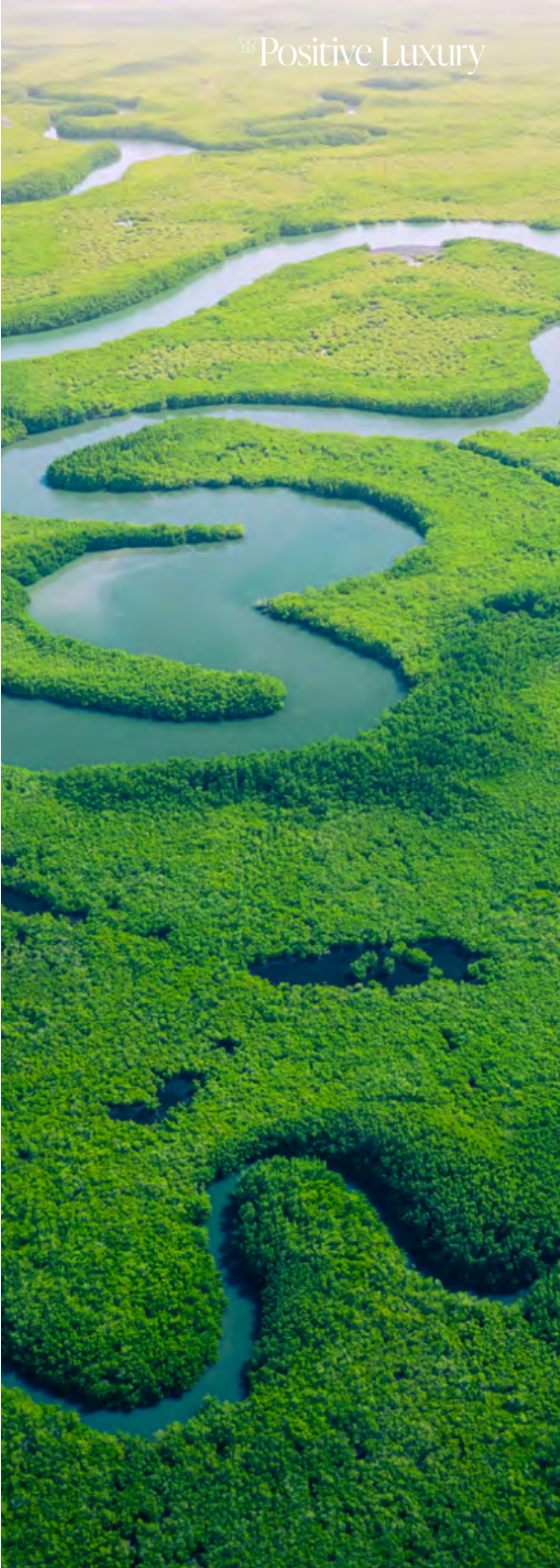
GOVERNANCE

A company must evidence that it operates in line with the leading global standards of best practice and transparency across its full value chain. We examine performance across six critical areas including standards & accreditations, traceability and target-based alignment to UN Sustainable Development Goals.



TOP SCORERS (ABOVE STANDARD)	
1.	Kama Ayurveda
2.	Canned Wine Co.
3.	Belvedere Vodka
4.	Stephen Webster
5.	Smiling Rocks
6.	Courvoisier
7.	U Beauty
8.	Livraria Lello
9.	Cariuma
10.	Kaea

BIGGEST TRANSFORMERS (POINTS IMPROVEMENT)	
Home House	77pts
Home Grown	72pts
ERDEM	65pts
Suave Tequila	59pts
Nexus Polaris DMC	57pts
The Glenturret	57pts
David Collins Studio	55pts
Fleming & Howland	54pts
Roja Parfums	54pts
Lola&Lykke	54pts





PART 2: WHAT'S IMPORTANT FOR 2025

THE KEY LUXURY INDUSTRY ISSUES | WHAT'S IMPORTANT FOR 2025

SHAPING A MORE SUSTAINABLE FUTURE FOR LUXURY: THE BIG INDUSTRY ISSUES FOR 2025

1. NATURAL CAPITAL AND THE BIG B

- Biodiversity conservation and the sustainable management of natural capital has come out from under the shadow of climate, and will become essential to ESG in 2025 as businesses recognise the ecological and economic value of biodiversity.
- This is being driven partly by the fact we will start to see nature-related risk disclosures in company reporting as CSRD and TNFD move from voluntary to mandatory disclosure in the coming years.
- Companies will increasingly adopt nature-based solutions, focusing on habitat protection, ecosystem restoration, and sustainable land use to mitigate risks and enhance resilience.
- While carbon emissions remain the dominant metric for environmental impact due to their measurability and comparability, a 'carbon tunnel vision' risks overlooking broader environmental issues like water, resource management, pollution, and overall biodiversity.
- This new emphasis means a shift from merely reducing carbon footprints to addressing overall environmental footprints, encompassing planetary boundaries and climate challenges. Importantly, preserving existing areas of rich biodiversity should be seen as a priority over attempting to recover already deteriorated ecosystems.
- Businesses will be required to have a much more forward-looking, anticipatory approach when it comes to environmental impact – and the costs of ecosystem restoration can often exceed those of proactive conservation.
- Failing to address biodiversity risks can result in significant financial impact, including disrupted supply chains, increased operational costs, reduced access to capital, and reputational damage.

2. CONVERGENCE OF WELLBEING AND ENVIRONMENTAL STEWARDSHIP

- In recent years, wellbeing has emerged as a key trend across various industries, including beauty, interior design, and travel.
- In 2025, wellbeing and the environment will become increasingly intertwined, particularly with younger generations, emphasising the interdependence of personal health, societal welfare, and planetary wellbeing.
- Brands will continue to integrate this thinking into their brand strategies to attract the conscious consumer – and promote stronger stakeholder engagement.
- The One Health framework – which takes a holistic approach to human, animal, and environmental health – was first introduced by the World Health Organisation in 2017. It is now gaining renewed momentum due to heightened post-COVID health awareness, increased consumer concern about environmental issues, greater appreciation for nature's role in mental and physical wellbeing – as well as the broader shift towards collaborative consumption and the sharing economy.
- Today's consumers are looking for products that enhance their lives in practical, tangible and meaningful ways – rather than vague corporate social responsibility promises that don't translate to solutions.
- Examples of these solutions include brands like Patagonia integrating employee wellbeing with sustainability by encouraging staff to participate in environmental volunteer projects, promoting both mental health and ecological stewardship. Similarly, VisitCopenhagen is testing an initiative that incentivises tourists to adopt more sustainable behaviours, such as cycling instead of driving, or participating in urban farming. In return, participants receive perks like complimentary meals and museum access.

“WELLBEING AND THE ENVIRONMENT WILL BECOME INCREASINGLY INTERTWINED... BRANDS WILL CONTINUE TO INTEGRATE THIS THINKING INTO THEIR BRAND STRATEGIES TO ATTRACT THE CONSCIOUS CONSUMER.”

3. TECHNOLOGY, AI AND THE OPPORTUNITY COST

- 2025 will see a continued shift in thinking when it comes to return on sustainability investment. Business leaders globally are investing in IT sustainability initiatives based on the perceived opportunity rather than cost mitigation alone – and this opportunity mindset is paying off. Organisations that embed sustainability are 52% more likely to outperform their peers on sustainability when compared with those that do not.
- Businesses that embed sustainability see a 16% increase in rate of revenue growth. Rather than evaluating return on investment, organisations are increasingly evaluating cost of missed opportunity if they don't.
- Investment in IT for sustainability can aid stakeholder engagement, attract best talent and position the business for AI integration.
- C-level executives expect AI to be a change agent in furthering their business while growing climate resilience which is regarded as one of the most pressing sustainability challenges faced by businesses and industries globally.
- AI can help businesses with complex data collection and environmental risk monitoring, regulatory compliance navigation, adaption to changing climate and to better manage their operations and assets.
- AI benefits are undeniable and the sentiment is very positive – though a majority of business leaders are not yet using AI for sustainability. Reasons include uncertainty about necessary budgets, inability to accurately define key performance indicators, lack of skilled workforce and expertise in AI/generative AI.

Sources:
[Mintel](#)
[World Health Organisation](#)
[Euromonitor](#)
[IBM](#)
[Urbanomy](#)
[ESG Matrix](#)

4. DE-RISKING THE SUPPLY CHAIN

- The coming year will see increasing focus on supply chain due diligence across the luxury industry, with growing regulations being the driving force behind it.
- For more information on upcoming regulatory frameworks, how it will affect businesses of all sizes and how to futureproof your operations, please refer to Positive Luxury [ESG Policy Guide](#) [here](#)



“BUSINESSES THAT EMBED SUSTAINABILITY SEE A 16% INCREASE IN RATE OF REVENUE GROWTH.”

BEAUTY & FRAGRANCE

A black and white artistic photograph. In the center, a butterfly with detailed wing patterns is perched on the rim of a petri dish. To the left, another petri dish contains several crescent-shaped, textured objects and small circular droplets. To the right, a clear glass perfume bottle with a dark cap is visible. The background is a plain, light-colored surface.

BEAUTY & FRAGRANCE: THE ISSUES THAT MATTER

1. PACKAGING WASTE

The beauty industry produces at least 120 billion pieces of packaging each year, and 95% of beauty packaging waste goes unrecycled. Excessive packaging, non-recyclable materials, single-use plastics and complex packaging designs contribute significantly to plastic pollution. Products with pumps and mixed materials exacerbate waste by further complicating the recycling progress. But consumer expectations are evolving: 81% of beauty customers surveyed agree that brands have a responsibility to reduce plastic packaging in their products.

CASE STUDY: AVEDA

Aveda became the first beauty brand to use 100% post-consumer recycled PET in its packaging. This initiative saves approximately 600 tonnes of virgin plastic annually, demonstrating the potential impact of sustainable practices.

2. DE&I

The beauty industry must embrace diversity and inclusivity across product design, representation and workforce diversity to stay inclusive and effectively serve the needs of all consumers, regardless of ethnicity, skin type, age, or gender. The British Beauty Council also highlights significant gaps in diversity and inclusion within the beauty sector, particularly in senior leadership and representation at decision-making levels. And whilst progress has been made with

product accessibility and expanded foundation shade ranges, categories such as blush and concealer still lag in inclusivity. Brands prioritising DE&I will foster consumer trust and loyalty – and set the standard for ethical and inclusive business practices in the industry.

3. HEALTH, SAFETY & WELLBEING

Ensuring the health and safety of consumers in the beauty industry requires addressing issues related to toxic ingredients, insufficient safety testing, regulatory gaps and the risks of microbial contamination. The absence of rigorous regulation, especially in the US, puts consumers at risk of using products containing harmful ingredients. Terms like ‘fragrance’, ‘parfum’ and ‘flavors’ are often used to conceal potentially harmful chemicals in fragrance formulations. The rise of ‘clean beauty’ claims has also created clean beauty confusion in the market. Products labelled as ‘natural’ or ‘clean’ don’t necessarily guarantee ingredient transparency – and can still pose health or environmental risks. Many marketing claims lack independent verification and regulatory oversight. Because clean beauty terms are not standardised, products may not meet the safety expectations consumers have.

CASE STUDY: SIMPLY ORGANIC BEAUTY

Emphasising health and safety by offering more beauty and haircare products free from harmful chemicals. Their mission prioritises stylist and client wellness, while promoting sustainable and ethical practices.

BEAUTY & FRAGRANCE: KEY FOR 2025

1. TRACEABILITY & TRANSPARENCY

Traceability is the ability to track an ingredient's journey from source to final product. Searches for 'sustainable beauty' have surged since 2023, particularly amongst younger consumers. In 2025 it will be essential in ensuring a product's integrity, verifying sustainability claims and upholding consumer trust. Industry collaboration is key – initiatives such as the Traceability Alliance for Sustainable Cosmetics (TRASCE) aim to enhance traceability across the entire beauty supply chain. Key industry players including LVMH, Sisley, L'Oréal and Shiseido are working together to develop solutions for better ingredient transparency and responsible sourcing, ensuring that beauty products meet sustainability goals – and foster consumer confidence. To build trust, transparency in marketing must be prioritised. 40% of green claims made by firms could be misleading, highlighting the prevalence of deceptive market practices jeopardising consumer trust, environmental integrity and the industry's reputation.

CASE STUDY: CREDO'S TRACEABILITY TOOLS

Multi-brand beauty retailer Credo uses ingredient traceability tools to ensure full ingredient disclosure, upholding its clean beauty standard across all brands it stocks.

CASE STUDY: ROMILLY WILDE'S TRANSPARENCY

Embracing biotech to create more sustainable ingredients, Romilly Wilde builds trust by using the Connected Butterfly Mark digital tool, ensuring their sustainability assessment scores are easy to access by consumers at point of purchase.



BEAUTY & FRAGRANCE: KEY FOR 2025

2. SUSTAINABLE INNOVATION THROUGH AI AND PACKAGING

New developments in packaging and innovation through AI will come to the fore in 2025. AI advances will further enhance the user experience and engagement, being able to recommend skin/scalp formulations, or generative AI enabling virtual makeup try-ons. These technologies enhance personalisation and bridge the gap between physical and digital beauty experiences. AI is also becoming a valuable tool in supply chain management, enhancing efficiency and reducing costs by optimising processes, predicting demand, improving inventory management, and identifying potential disruptions before they happen. Another area where AI will make a significant impact is in product formulation. L'Oréal's Augmented Beauty platform, for instance, leverages artificial intelligence to analyse vast amounts of data on ingredients, their interactions, and their effects on the skin and hair. With the cosmetic packaging industry expected to grow to \$33bn by 2025, packaging waste is contributing to global plastic pollution and the depletion of natural resources. New developments continue in refillable and lightweight packaging, biodegradable packaging and airless packaging technology.

CASE STUDY: SEPHORA VIRTUAL ARTIST

Exemplifying innovation by integrating face recognition to analyse skin tones and suggest personalised looks, Sephora's platform allows customers to virtually try on hundreds of products, bridging the gap between physical and digital beauty experiences.

CASE STUDY: SHELLWORKS PACKAGING

Through biotechnology, Shellworks creates an alternative to plastic called Vivomer that is safe, performant and does not create waste. Made from microorganisms, Vivomer behaves just like plastic in use and manufacture but is home compostable so will break down naturally when disposed of. Shellworks is currently working with brands such as Amarey and Haeckels.

CASE STUDY: BEAUTY KITCHEN & REPOSIT

Beauty Kitchen has teamed up with Reposit to tackle single-use packaging waste by enabling customers to return used packaging at dedicated collection points in exchange for a discount on their next purchase. Reposit's circular upstream solution encourages reuse and recycling.

“REPOSIT IS TRANSFORMING THE WAY BEAUTY BRANDS TACKLE PACKAGING WASTE BY PROVIDING A CIRCULAR, RETURN-AND-REUSE SYSTEM THAT ELIMINATES THE NEED FOR SINGLE-USE PACKAGING.”

Jo Chidley, Founder, Reposit

BEAUTY & FRAGRANCE: KEY FOR 2025

3. SUSTAINABLE PROCUREMENT

With legislation in the pipeline and the EU working to ban more substances in cosmetics sold in the EU in 2025 – such as carcinogens and mutagens – it is vital to derisk your supply chain for the safety of people and planet. And with carbon emissions from sourcing raw materials accounting for 30-50% of the industry's emissions, beauty businesses need to address sourcing. Sustainable procurement practices focus on minimising environmental and social impacts throughout the supply chain. Ingredients such as palm oil, mica and essential oils are linked to deforestation, habitat degradation and child labour. Solutions include up-cycled plant oils or oils produced via microbial fermentation from yeast or algae that mimic palm oil's properties. Innovation through synthetic biology, lab-engineered oils and ingredients is another option. Biotech products are rapidly gaining traction to create innovative ingredients more ethically, and that have a lower environmental impact. Biotech-enabled fragrance will continue to reduce the industry's reliance on fossil fuel-based ingredients by incorporating plant-based and biofermented alternatives. L'Oréal, for instance, aims to make 95% of its formula ingredients bio-based by 2030. Waste management is also a significant challenge, and sustainable logistics can play a crucial role in reducing waste through optimising inventory management, and implementing recycling programmes. Exploring alternative packaging solutions must also be considered: brands can decrease their environmental impact and the waste associated with transportation and packaging. Packaging accounts for approximately 70% of waste, but is just one contributor amongst chemical waste from production, expired products, formula testers, and water use/waste.

CASE STUDY: UPCYCLING COFFEE WASTE

Kaffe Bueno specialises in upcycling coffee by-products into cosmetic ingredients, offering a sustainable alternative to traditional raw materials. UpCircle has transformed over 450 tonnes of coffee waste into skincare products, whilst incorporating other upcycled materials such as chamomile stems from the tea industry and argan shell powder from the argan oil industry. These initiatives contribute to a circular approach in skincare production, reducing waste.

CASE STUDY: MILLER HARRIS

British fragrance house Miller Harris works closely with its suppliers on sustainability-informed design. In 2024, it was able to reduce the weight of its travel sets by 65% and discovery sets by 23%. It also developed a bath and body range to use 100% PCR fully recyclable bottles.

“SUSTAINABLE PROCUREMENT AND UPCYCLING AREN’T JUST AN ETHICAL CHOICE, BUT ALSO OPPORTUNITIES TO PRESENT COMPELLING BRAND STORIES THAT RESONATE DEEPLY WITH NEW GENERATIONS OF INFORMED CONSUMERS, SUCH AS GEN Z... LUXURY BRANDS CAN PLAY A PIVOTAL ROLE IN REPOSITIONING UPCYCLED MATERIALS AS HIGH-VALUE RATHER THAN MERELY ‘ECO-FRIENDLY,’ DRIVING SIGNIFICANT SHIFTS IN CONSUMER ATTITUDES ACROSS THE MARKET.”

Al Iannuzzi, Vice President, Sustainability at The Estée Lauder Companies

“STRATEGIC PARTNERSHIPS AND COLLABORATIONS ARE ESSENTIAL, WHICH IS WHY THE ESTÉE LAUDER COMPANIES AND TOM FORD SOUGHT OUT AN OPPORTUNITY TO WORK WITH LONELY WHALE, AN AWARD-WINNING NON-PROFIT WITH A MISSION TO PREVENT PLASTIC WASTE. WITH 11 MILLION METRIC TONS OF NEW PLASTIC ENTERING THE OCEAN EVERY YEAR THERE IS MUCH AT STAKE FOR THE OCEAN, WHICH SUSTAINS OUR LIFE ON EARTH. WE ARE PROUD TO PLAY A PART IN HELPING TO ACCELERATE VIABLE SOLUTIONS.”

Al Iannuzzi, Vice President, Sustainability at The Estée Lauder Companies

FASHION & ACCESSORIES



FASHION & ACCESSORIES: THE ISSUES THAT MATTER

1. WASTE & CIRCULARITY

According to the Ellen MacArthur Foundation, a circular economy is a system where materials never become waste and nature is regenerated. Circular fashion focuses on creating a closed-loop system that minimises waste and extends the lifespan of clothing by rethinking design, production, use, and disposal. This approach is crucial for reducing the environmental impact of the fashion industry and aligning with sustainable circular economy principles.

CASE STUDY: STORY WEAR

Story Wear is a zero-waste fashion brand founded in Taiwan in 2018, with a model built upon cradle-to-cradle design methods with handcrafted denim pieces made from 100% upcycled materials, factory deadstock and waste fabric. It has also implemented an end-of-life reclamation programme where customers can donate denim to its flagship store and receive 10% off their next purchase, rewarding circular consumption habits. By utilising 100% denim which is made from cotton, Story Wear's fabrics are durable for wear, yet easily recyclable, making its products circular down to the material level. Story Wear's goal with this model is to contribute to the global circular economy, in turn keeping fashion waste out of landfill and closing the loop.

2. CLIMATE

The industry's climate impact is significant. According to the UN it contributes around 10% of all the greenhouse gas emissions globally – more than aviation and shipping combined. And the industry is under significant threat from what it is contributing to – extreme weather events related to climate change severely impact global supply chains. It is key to reduce energy-intensive processes and curb the environmental damage caused by inefficient supply chains and unsustainable materials. Climate in fashion is about responsible sourcing of materials, circularity, carbon accountability and decarbonising supply chains, water stewardship, waste minimisation and stakeholder collaboration. It is vital to measure and monitor your impact, set clear targets for reduction and track progress – transparently.

CASE STUDY: BURBERRY

Burberry became the first luxury fashion company to receive approval for its net-zero emissions target by the Science Based Targets initiative (SBTi). Through the Climate Positive initiative, it is committed to reach net-zero GHG emissions by 2040, and clearly measures and reports the progress of its actions against targets.

FASHION & ACCESSORIES: THE ISSUES THAT MATTER

3. SUSTAINABLE SOURCING

Sustainable sourcing is crucial for reducing the environmental impact of the fashion industry. By ensuring materials are sourced responsibly the industry can reduce the depletion of non-renewable resources like water, soil, and energy. Prioritising sustainable practices throughout the production process will also reduce pollution, waste, and reliance on chemicals that may be harmful for both people and the environment. The fashion industry also carries an immense social responsibility. Sustainable sourcing will help businesses ensure fair wages, safe working conditions, and human rights in their supply chains. Ultimately, sustainable sourcing practices and building closer connections with suppliers – together with prioritising transparency – will help ensure supply chain resilience by mitigating risks such as resource scarcity, supply chain disruption and regulatory pressures.

CASE STUDY: BAV TAILOR

With visibility and up-to-date records of all its direct suppliers, the brand's supply chain network is built on authentic partnerships and maintained with regular in-person visits. Its sustainable sourcing strategy considers five key elements when selecting a partner – from the supplier's sustainability road map to records of where products are made. Each supplier must provide a Code of Conduct or sign a Supplier Trust Policy. 70% of current production is 100% Made-In-Italy to reduce the company's carbon footprint and ensure due diligence of each supplier. 90% of materials are sourced locally in the country of production.

FASHION & ACCESSORIES: KEY FOR 2025

1. REPAIR, RESALE AND RETURNS

According to the British Fashion Council, three-quarters of returned clothes that cannot be resold end up in landfill or energy-from-waste plants. Repairing and reselling returns are key for a sustainable industry because they extend the lifespan of garments and reduce textile waste (although unlikely to break the cycle of over-production and continual proliferation of new collections). The resale market in the US grew fifteen times faster than the broader clothing retail sector in 2023. In 2025 it is predicted that secondhand sales will account for 10% of the global apparel market, and the segment is expected to grow at a compound annual growth rate of 12% to reach \$350 billion by 2028. Returned items are often wasted because the post-purchase handling cost may be greater than new item manufacturing cost, disincentivising brands to resell the returned items. Businesses are – and must – strategise how to overcome the inefficiencies of reverse logistics, including increasing their investment in software to facilitate peer-to-peer reselling of luxury items on their platforms.



“AS THE FASHION INDUSTRY GRAPPLES WITH ITS ENVIRONMENTAL IMPACT, THE DEMAND FOR REPAIR AND GARMENT CARE SOLUTIONS HAS GROWN EXPONENTIALLY. WE VIEW REPAIRS NOT AS A COST CENTRE BUT AS A CRITICAL PATHWAY TO ACHIEVING CIRCULARITY, REDUCING WASTE, AND FOSTERING BRAND DESIRABILITY. BY EMBEDDING REPAIR SOLUTIONS INTO THEIR AFTERSALES STRATEGIES, BRANDS CAN SIGNIFICANTLY LOWER THEIR ENVIRONMENTAL FOOTPRINT WHILE CREATING A MEANINGFUL NEW TOUCHPOINT FOR CUSTOMER ENGAGEMENT. REPAIRS ARE NO LONGER JUST A REACTIVE SERVICE; THEY REPRESENT A PROACTIVE COMMITMENT TO CIRCULARITY AND A STRATEGIC RESPONSE TO THE ECONOMIC SOBRIETY IMPACTING THE LUXURY MARKET. BY EMBRACING THIS SHIFT, BRANDS CAN TRANSFORM REPAIRS FROM AN AFTERTHOUGHT INTO A COMPELLING SOLUTION THAT ALIGNS WITH BOTH ENVIRONMENTAL AND ECONOMIC IMPERATIVES.”

Hasna Kourda, CEO & Co-Founder, Save Your Wardrobe

“DESPITE THE LAST COUPLE OF YEARS BEING SLIGHTLY TURBULENT FOR MOST BUSINESSES, IT'S MORE IMPORTANT THAN EVER TO ENSURE SUSTAINABILITY IS STILL ON THE AGENDA FOR BRANDS. AFTERSALES SERVICES, AND REPAIR IN PARTICULAR, ARE ONE OF THE GREATEST KEYS FOR UNLOCKING CUSTOMER LOYALTY AND LIFETIME VALUE AND BRANDS NEED TO TRULY UNDERSTAND THE IMPORTANCE OF EMBEDDING CIRCULARITY AND AFTERCARE INTO THEIR BUSINESS MODELS SO THAT THEY CAN BE A BRAND THAT STANDS THE TEST OF TIME IN AN EVER-CHANGING MARKET.”

Josephine Philips, Founder & CEO, Sojo

FASHION & ACCESSORIES: KEY FOR 2025

2. MATERIAL INNOVATION

Innovation in materials will remain a key driver of sustainability in the fashion sector. Advances in sustainable fibres and bio fabricated textiles – made from living organisms like bacteria, yeast, algae, and fungi – will help reduce reliance on resource-heavy materials such as conventional cotton and synthetics, often requiring less water, pesticides, or chemical treatments during production. The ongoing use of recycled fibres will reduce the demand for virgin raw materials, while lab-grown alternatives to materials like silk and synthetic wool provide high-quality, cruelty-free options. Additionally, cutting-edge technologies will allow brands and consumers to trace the origins of the materials used in garments, starting a new era of transparency in the fashion industry.

CASE STUDY: MAES PARIS

MAES Paris unites exceptional French savoir-faire and innovative materials to pioneer replacing animal-based options like leather for its bags with more sustainable alternatives – without compromising the quality, durability or exceptional craftsmanship of French artisans. Its first collection of bags and accessories launched in 2022 was made in M_MAT_cactus, relying on organically-grown nopal cactus from Mexico to deliver an environmental impact significantly lower than that of traditional leather. Always striving to innovate, MAES Paris has developed and launched M_MAT_mycelium with its European partner MycaNova, tapping into the incredible potential of fungus to reduce the impact of its bags even further.

CASE STUDY: PIPER & SKYE

Piper & Skye has implemented a thorough materials sourcing strategy focusing on material origins, animal welfare, circularity, biodiversity and chemical content of sourced primary materials. It uses invasive python, for instance, to regulate and maintain healthy populations of these animal species and protect the surrounding ecosystems – as overpopulation of this invasive species endangers small mammal populations in the region. It also uses pirarucu fish skin, which is a byproduct of a natural food source, making more efficient use of the whole fish while simultaneously ensuring that the skins do not end up in landfill or being burned. The tanning process is 100% free from chrome, nanoparticles, synthetic dyes and artificial fragrance, so water used in the process is not toxic and can be collected, pH balanced and used in irrigation.

FASHION & ACCESSORIES: KEY FOR 2025

3. SUPPLY CHAIN RESILIENCE

It's never been more important for businesses to invest in building agility and flexibility. Sourcing materials and products closer to home – to more local or regional sourcing hubs – can help reduce lead times and dependency on global supply chains. Helping suppliers build capacity in sustainable practices and risk management will improve their ability to handle unexpected events. Meanwhile, diversifying supply base and not relying on a single geographic location can help businesses mitigate the risks of localised disruptions. Brands must be prepared to adopt more agile production processes that can quickly shift between different materials, styles, or suppliers in response to changing demand or disruptions. Leveraging AI and machine learning tools will become more crucial to predict supply chain disruptions based on historical data, geopolitical events and even weather patterns. Businesses will continue to choose modular product design where components can be sourced from multiple suppliers, enabling quicker adjustments to production when one supplier faces issues.

CASE STUDY: CECILIE BAHNSEN

To maintain visibility over its supply chain and limit carbon emissions through logistics, Cecilie Bahnsen's supply chain is primarily Europe-based. Through continuous research and responsible sourcing practices, the brand is also taking action to switch to more sustainable materials such as Organic Cotton, Recycled Faille and Recycled Cashmere.



A black and white photograph of a woman with long hair, wearing a striped shirt and an apron, painting a wooden chair in a workshop. A butterfly is perched on the top rail of the chair's backrest. The background shows various wooden materials and tools, suggesting a carpenter's shop or a furniture restoration studio.

INTERIORS & LIVING

INTERIORS & LIVING: THE ISSUES THAT MATTER

1. SUSTAINABLE PROCUREMENT

Whether you are directly manufacturing goods or procuring the finished products, it is critical to know exactly where your items come from and how they are made. From materials used to the energy running the manufacturing site and the ethics behind the production process, you must know your supply chain. When it comes to material sourcing, the conservation of natural resources such as timber (use FSC), water and energy should be prioritised – not depletion of finite resources. Choose low carbon, upcycled or natural materials that minimise carbon emissions and where practical support local suppliers. Designers are in a prime position to influence clients and customers: with around 80% of the ecological impacts of a product locked in at the design phase. The decision-making stage is an opportunity to present more sustainably and locally sourced options.

CASE STUDY: TAYLOR HOWES

When selecting more sustainable materials, Taylor Howes consider the following: location, composition and process. For example: Location – where is the product made? How is the product transported? Is the product made locally and where did the supplier procure the materials to make the item? Composition – what is the product made from? Are the fibres natural? Have they been chemically treated? Process – what chemicals (if any) are used at the workshop? What machinery is used? Does the workshop/factory use sustainable energy?

2. CLIMATE

It is key to understand the impact of the products and materials used, as well as methods of manufacturing. Focusing on high-impact areas will make the most significant progress towards sustainability, cutting emissions and enhancing efficiency where it matters most. Developing a climate resilient supply chain by having a diverse supply chain – for example, sourcing materials from multiple locations – can help minimise risk from sudden flooding, drought or fire. This helps to ensure continuity and reduce disruption. Embracing incoming legislation, completing audits and identifying and managing risks will have a positive effect on your emissions. Designing for energy efficiency offers architectural businesses and design studios the opportunity to take advantage of local climate conditions and reduce significant carbon footprints from operational emissions made up of heating, cooling and lighting. Shipping is another core area to be more sustainable since moving raw materials and finished products – often over long distances – has a significant climate impact.

INTERIORS & LIVING: THE ISSUES THAT MATTER

3. HAZARDOUS MATERIALS

From asbestos to arsenic to lead, the history of interior design and decorations is littered with examples of harmful chemicals. The use of chemicals within the interiors industry is prevalent from sourcing to manufacturing – from stain resistant or anti-crease furniture treatments to wood finishes and fabric dying processes. Volatile Organic Compounds (VOCs) found in paints, glues and varnishes present risks to both workers and consumers – and contribute to greenhouse gas emissions. Using low VOC or natural based alternatives can help reduce a company's emissions levels and improve the quality of living or working environments. 10-20% of an average sofa's composition could be made up of flame-retardant chemicals. Demand transparency from suppliers of all potential hazardous chemicals and materials, and in turn be transparent to your clients and consumers. It is important to explore alternatives and collaborate with suppliers towards innovative solutions.

CASE STUDY: SOANE BRITAIN

Taking action to meet flammability regulations without using fire retardant (FR) chemicals, in 2024 Soane Britain achieved the goal of all its upholstery fillings being FR chemical free. Its next challenge is removing the 5% plastic composition of the wool-based interliner required by UK law for upholstery and continues work to eradicate the use of 'Red List' chemicals, and those identified by the EU's chemicals legislation (REACH) as 'of very high concern'.

4. WASTE & CIRCULARITY

Designing for durability, modularity, and recyclability is key in interiors – considerations for waste reduction and circularity need to be taken at the start of the design phase. We are all aware of fast fashion's waste mountains and synthetic materials ending up in landfill, but the 'fast interior' trend presents huge challenges. Waste management is an essential part of your environmental impact and is important for regulatory compliance. Responsible waste disposal and recycling options are standard positive actions businesses must take. Implementing these procedures can also reduce costs – and attract conscious consumers. Embracing circular principles such as the repair, reuse, remodel and upcycling are all viable options for your business. Explore these not only when sourcing materials but also when designing products. Don't just consider the product and materials lifecycle – apply the same approach to the vast amount of waste created in packaging, including transit packaging.

CASE STUDY: WILLIAM FLOYD MACLEAN

William Floyd Maclean's Somer collection is an inspiration. Not only is it produced in FSC-certified wood, but is designed to be easily disassembled and reused.

INTERIORS & LIVING: KEY FOR 2025

1. GREEN DESIGN

Biophilic design uses natural elements, natural light, patterns and forms. Together with natural material choices, it can improve occupant wellbeing and reduce stress by fostering a connection with nature. In 2025, this aligns with the increasing demand for more sustainable and health-focused living environments. Natural elements such as indoor plants, natural light, and organic materials are used to create serene and luxurious spaces that promote mental and physical health, thus meeting the evolving preferences of discerning consumers who prioritise both luxury and sustainability. Expect a greater use of natural products such as stone and wood (bamboo is increasing in popularity as a more sustainable alternative as it grows fast, is durable and resistant and can be used in a wide range of applications), together with vegan leathers such as Pinatex (from pineapple leaves), cork leather and mushroom leather (mycelium). Adoption of new, innovative materials has been slower than in fashion, for example, due to the durability requirements of interiors sector, but technology is constantly improving the quality of these materials. Also expect a drive for more non-toxic materials and items that can be more easily reused or repurposed to reduce waste.

“
AT KATHARINE POOLEY WE HAVE FOUND
AN INCREASE IN OUR CLIENTS WHO
ARE ACTIVELY ENGAGED IN MAKING
SUSTAINABLE CHOICES FOR THEIR
PROJECTS, AND ARE PASSIONATE ABOUT
IT. WE ARE HOPEFUL THAT THIS WILL
CONTINUE IN 2025 AS OUR CLIENTS
SHUN THE PREVIOUSLY DEFAULT
ELEMENTS FOR HAND CRAFTED,
NATURAL AND REPURPOSED CHOICES.”

Katharine Pooley

INTERIORS & LIVING: KEY FOR 2025

2. UPCYCLING

Upcycling is gaining prominence in the interiors sector because it transforms waste materials and old furniture into new, stylish pieces, reducing landfill waste and conserving resources. This more sustainable practice is emerging as consumers and designers increasingly value circular and unique décor solutions. There is also tremendous power to influence here at the design stage. Consider reupholstering or transforming existing furniture before buying new. Reclaimed materials can be more sustainable, reduce waste and reduce costs – from salvaged stone to industrial salvage. Adaptive reuse involves repurposing old buildings or furniture to create unique and modern spaces, breathing new life into existing structures, whilst combining history with contemporary design.

3. LOW VOC PAINTS & ADHESIVES

Low VOC (Volatile Organic Compounds) paints and adhesives significantly reduce the emission of harmful chemicals into indoor air, improving air quality and reducing health risks such as respiratory issues and allergies. This makes them a crucial focus for 2025 as consumers and designers increasingly prioritise sustainable materials that contribute to healthier living and working environments. Additionally, stringent environmental regulations and a growing awareness of the long-term benefits of green building practices are driving the demand for low VOC products.

CASE STUDY: GRAPHENSTONE PAINTS

Graphenstone select materials based on their environmental impact, renewability, and performance to ensure first rate paint products. Its focus is on non-toxic and biodegradable ingredients that contribute positively to both the environment and human health. Examples include graphene, a revolutionary material that strengthens their paints, extending lifespan and reducing the need for frequent repainting – which in turn lowers resource consumption. As a base material, lime is natural (with a low embedded carbon profile), offering excellent breathability and mould resistance, making it ideal for more sustainable building environments.

**“42% OF THE 92 MILLION TONNES OF
TEXTILE WASTE PRODUCED EACH YEAR
IS ATTRIBUTED TO INTERIORS,
HOMEWARE & LEISURE.”**

National Institute of Health WRAP Textiles report

JEWELLERY & WATCHES



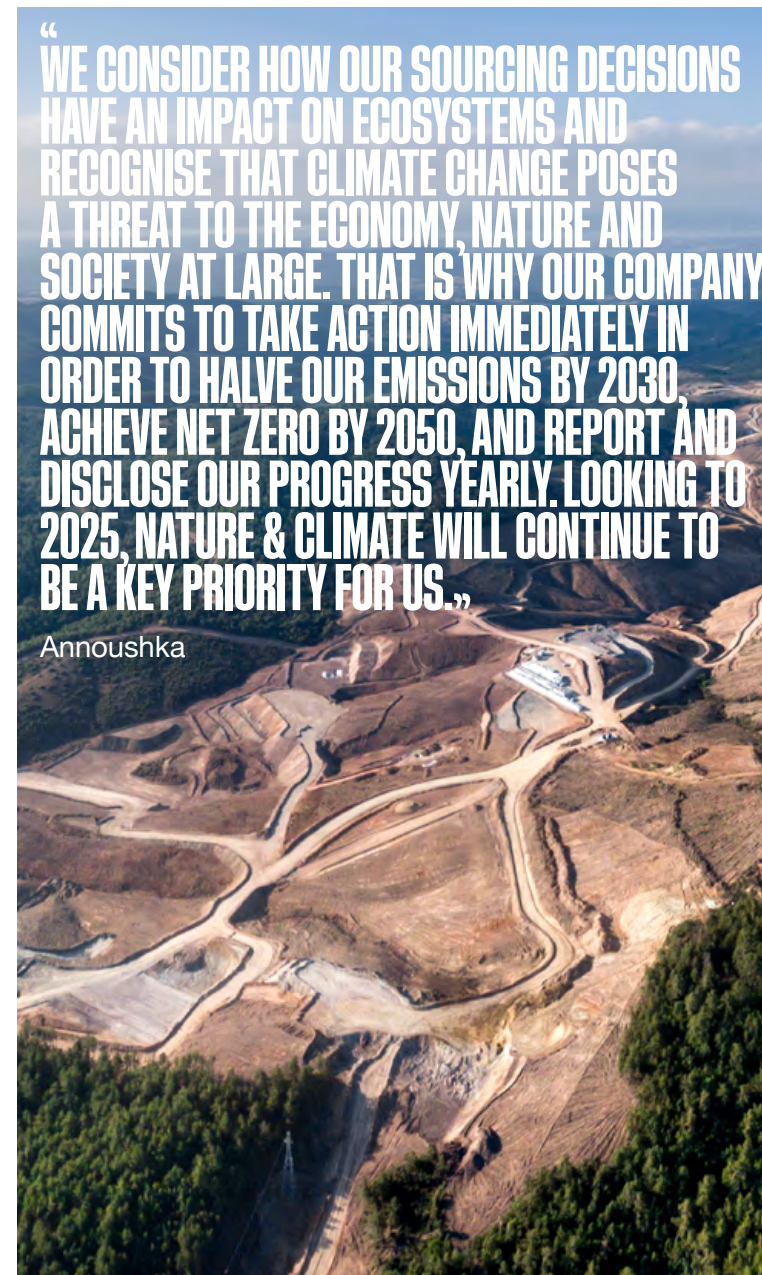
JEWELLERY & WATCHES: THE ISSUES THAT MATTER

1. CLIMATE CHANGE MITIGATION

Climate is critical to the jewellery and watch industry due to its impact on sourcing, production, and consumer expectations. Mining and manufacturing processes have significant environmental footprints, with climate change exacerbating resource scarcity, supply chain disruptions, and ethical concerns. Extraction of precious gems and metals is highly carbon intensive: mining a single tonne of gold can produce 38,000 tonnes of CO₂. Additionally, extreme weather events can disrupt supply chains, making it harder to source raw materials and meet production timelines. Addressing environmental impact has become essential for maintaining consumer trust, as well as compliance with regulations and long-term business success. As we enter 2025, the year represents a significant milestone for many companies striving to meet their science-based climate targets. With interim goals set for 2025, these benchmarks act as a critical progress check on the path to achieving net-zero emissions by 2050, aligning with global commitments to limit warming to 1.5°C above pre-industrial levels.

“WE CONSIDER HOW OUR SOURCING DECISIONS HAVE AN IMPACT ON ECOSYSTEMS AND RECOGNISE THAT CLIMATE CHANGE POSES A THREAT TO THE ECONOMY, NATURE AND SOCIETY AT LARGE. THAT IS WHY OUR COMPANY COMMITS TO TAKE ACTION IMMEDIATELY IN ORDER TO HALVE OUR EMISSIONS BY 2030, ACHIEVE NET ZERO BY 2050, AND REPORT AND DISCLOSE OUR PROGRESS YEARLY. LOOKING TO 2025, NATURE & CLIMATE WILL CONTINUE TO BE A KEY PRIORITY FOR US.”

Annoushka



JEWELLERY & WATCHES: THE ISSUES THAT MATTER

2. SUSTAINABLE PROCUREMENT

Challenges posed from the sourcing of materials, circularity and traceability across supply chains means sustainable procurement is a key material issue for the watch and jewellery industry. Notably, the use of steel in luxury timepieces comes with issues of raw material shortages and dependency on natural elements for production. Exotic leathers traditionally used in watch straps come under scrutiny for ethical and environmental reasons as does the mining of gemstones. This is in addition to climate-related risks, which can provide further complexities. Unsustainable resource extraction is a risk to business, leading to depletion of critical materials and increased vulnerability to supply chain disruptions. Incoming regulatory compliance makes sustainable procurement not just a corporate responsibility but a legal necessity. Steel production accounts for around 7% of all CO2 emissions globally – as watches are predominantly made of steel, using recycled steel will enhance the sustainability of the supply chain. The extraction of gold is one of the most carbon-intensive activities in the jewellery industry. Diamond mining, especially through methods like open-pit and underground mining, is highly energy-intensive – also causing other environmental degradation such as soil erosion, water contamination and deforestation.

STEPHEN WEBSTER: ETHICAL SOURCING

Stephen Webster worked with Positive Luxury for guidance on how to conduct diligent supplier inspections without putting the supplier relationship at risk and ensuring an efficient process for all parties. It now has a comprehensive supply chain assessment process in place, with 100% of all supply chain partners signing a Code of Conduct. It saw significant improvements in its Sustainable Procurement, Health & Safety and Human Rights performance against Positive Luxury's ESG+ assessment framework.

JEWELLERY & WATCHES: THE ISSUES THAT MATTER

3. HUMAN RIGHTS & ETHICAL OPERATIONS

The jewellery industry employs over 100 million people, mostly in the Global South, where artisanal and small-scale mining (ASM) predominates. Unlike industrial mining, artisanal mining is often illegal and fraught with child labour and human rights violations, particularly in gold and diamond sourcing. Yet ASM continues to grow as a livelihood for millions, driven by rising mineral prices and economic challenges in agriculture and rural employment. In addition, there is often gendered relations that need to be considered, with some artisanal mining initiatives promoting gender equality and providing a source of income to those community groups who have been historically oppressed. Therefore, despite being a high-risk industry, there are social benefits that can empower communities and promote positive social changes in some regions. Is ASM gold more sustainable or better than recycled gold? Both have benefits, but the answer isn't always clear-cut. Whilst recycled gold may seem more sustainable (and consumers may prefer that it has less of a price premium) there can be serious issues surrounding transparency with recycled metals.

CASE STUDY: CHARLOTTE CORNELIUS x MOYO GEMS

The international nonprofit organisation Pact spearheads Moyo Gemstones in partnership with women's mining associations—AWEIK in Kenya and TAWOMA in Tanzania and commercial partners like ANZA Gems, Maison Piat, and Nineteen48. For Charlotte Cornelius, partnering with Moyo Gemstones ensures that the stones it selects are not only traceable but also sourced under fair conditions. Miners are treated fairly, both physically and financially, aligning with the brand's social sustainability goals.

CASE STUDY: DE BEERS GROUP

De Beers introduced the GemFair programme to connect artisanal and small-scale miners to the global market. GemFair aims to support the artisanal sector by raising standards, offering fair value, supporting traceability and identifying a secure route to market for responsibly sourced diamonds. The programme has grown from 14 mines in 2018 to over 400 in 2024.

Sources:

[Delve](#)

[JCK](#)

[Charlotte Cornelius](#)

[De Beers Group](#)

JEWELLERY & WATCHES: KEY FOR 2025

1. BIODIVERSITY

Businesses are now waking up to nature-related risks and recognising the ecological – and economic – value of biodiversity. The industry is dependent on natural resources like water and soil across the production process with operations exacerbating ecological challenges and endangering local biodiversity. Water use is extensive in casting, stripping cleaning and plating operations involved in the production of jewellery and watches. Top layers of soil and vegetation are removed for mining purposes. In 2025 it is important for businesses to understand how their sourcing decisions could potentially endanger ecosystems to be able to take steps that will reduce their negative impact on biodiversity in the long term. Wider ecological context should be considered and biodiversity-related risks such as presence of endangered species, levels of water scarcity and waste toxicity in the regions in which businesses operate.

WJI 2030'S NATURE ROADMAP

At the JCK Las Vegas Sustainability Summit in 2024, the Watch and Jewellery Initiative 2030 (WJI 2030) launched the Nature Roadmap to provide a framework for businesses to act together in response to the nature and biodiversity crisis. It includes guidance on the key steps that companies need to take: Assess, Commit, Transform, and Disclose. The roadmap is the result of a collaborative effort between WJI 2030 members and leading industry and biodiversity experts, and distils information on available frameworks, leading practices, and expert knowledge to provide a clear path for companies to make meaningful contributions to biodiversity. As a living document, the Nature Roadmap will continually evolve, responding to changes in the nature-business landscape to remain relevant and effective.

CASE STUDY: MEJURI'S SALMON GOLD

Mejuri's Salmon Gold project connects biodiversity to the jewellery industry. It uses North American legacy mines to produce fully traceable gold, whilst contributing to the environment through habitat restoration across Alaska, the Yukon Territory and British Colombia.

JEWELLERY & WATCHES: KEY FOR 2025

2. INNOVATION

Innovation in materials, manufacturing, and digital experiences will be pivotal in 2025. By embracing plant-based leathers, synthetic gemstones, 3D printing, CAD, and AI-powered customisation, brands will not only enhance the artistry and craftsmanship of their products but also cater to growing consumer demands for sustainability, personalisation, and ethical practices. With the world's first lab grown ruby in 2024, we'll see advanced materials such as recycled metals and lab-grown gemstones complementing conscious designs – whilst businesses will focus on ethical sourcing practices for all materials. Virtual try-ons and other digital tools will further elevate the shopping experience, creating seamless, immersive customer journeys and ensuring that luxury remains a symbol of innovation as much as tradition. Historically, online sales of fine jewellery have represented a smaller proportion of the market than its luxury industry counterparts, with more emphasis on in-person experience. Advances in AI try-on tech will help brands see increased value of their omnichannel shopping approach.

Digital tools will also meet the demands for transparency, enabling brands to communicate their sustainability efforts and build trust with stakeholders. The increased prevalence of product passports and blockchain technology will be used in the tracing of the product throughout the value chain, as well as future authenticity, ownership and repair tracking. The integration of smart technology with luxury jewellery and watches means more high-end smartwatches merging traditional luxury craftsmanship with advanced technology. They'll offer features such as health tracking, notifications, and integration with digital platforms whilst retaining the timeless aesthetics and exclusivity of luxury watches. Similarly, smart jewellery will combine function with elegance, offering discreet connectivity and lifestyle features without compromising on style.

CASE STUDY: TIFFANY & CARTIER'S SNAPCHAT FILTERS

Both Tiffany & Co. and Cartier have tapped into the potential of Gen Z consumers by launching Snapchat try-on filters, allowing users to try on jewellery virtually. This blending of digital convenience with luxury resonates with younger luxury consumers.

JEWELLERY & WATCHES: KEY FOR 2025

CASE STUDY: VAULTIK'S DIGITAL PRODUCT PASSPORTS

Luxury fintech, Vaultik's technology is being applied in the luxury watch market through its partnership with NIX Time, a London-based start-up that customises high-end watches like Rolex by altering dial details or skeletonising the interior. Vaultik powers Digital Product Passports for NIX, integrating insurance, the watch's original serial number, authentication from trusted London dealers, and an additional warranty. This innovation offers transparency and authenticity guarantees to customers.

CASE STUDY: SKYDIAMOND INNOVATING CARBON REDUCTION

Technology advances in the industry can also aid climate change mitigation. Skydiamond is leading the way harnessing technology to create man-made diamonds that form combining carbon with harvested rainwater under intense heat and pressure. This carbon negative process indicates the great potential to create positive impact in the jewellery and watches space.



JEWELLERY & WATCHES: KEY FOR 2025

3. TRACEABILITY

As Iris Van der Veken, Executive Director and Secretary General of the Watch & Jewellery Initiative 2030, points out, “Traceability has become a pivotal trend in the global watch and jewellery industry, driven by the need for regulatory compliance, risk management, and brand reputation preservation.”

In 2025, traceability will become a cornerstone of both innovation and integrity in the luxury sector. The rise will see brands increasingly use technologies like blockchain and digital certifications to enable them to ensure sustainable practices and strengthen their reputation. Blockchain technology can be used to track every step in the journey of a product, from raw material extraction to manufacturing, distribution, and final sale. This level of visibility helps ensure the authenticity and integrity of materials, particularly with precious metals and gemstones, which are often associated with human rights abuses or environmental harm.

For instance, blockchain can verify the sourcing of diamonds or gold, ensuring they are conflict-free and mined under responsible conditions. It also provides consumers with a reliable proof of certification, validating a product’s authenticity and craftsmanship. Brands can reduce the risk of counterfeit goods, and guarantee the origin and quality of their products. Proving authenticity can support resale to promote circularity within the industry.

One of the main drivers behind the rise of traceability in the luxury sector is the need to build and maintain consumer trust. As consumers become increasingly concerned about ethical sourcing and sustainability, they are demanding more transparency from brands regarding where and how their products are made. The ability to monitor supply chain standards through tools helps companies proactively address these concerns. By offering clear, accessible data on product provenance, brands can differentiate themselves in an increasingly competitive market. Transparency also serves as a safeguard against potential reputational risks. If a company is unable to demonstrate that its supply chain meets certain ethical and environmental standards, it risks losing consumer trust or facing public backlash.

“**ENSURING TRACEABILITY AND ETHICAL SOURCING IN THE JEWELLERY INDUSTRY CAN BE CHALLENGING, BUT WE PRIORITISE BUILDING STRONG, TRUSTED RELATIONSHIPS WITH OUR SUPPLIERS... BY COMMITTING TO USING EXCLUSIVELY RECYCLED METALS AND TRACEABLE GEMSTONES WHENEVER POSSIBLE, WE ENSURE ETHICAL SOURCING IN ALL OUR CREATIONS AND ARE EXCITED ABOUT THE POSSIBILITY OF FURTHER INTEGRATING TRACEABILITY INTO OUR OPERATIONS IN THE FUTURE.**”

Daniella Draper

A black and white photograph of a bartender's hands. The bartender is using a long metal garnish stick to place a slice of lemon into a glass filled with ice and a dark liquid. A small butterfly is perched on the handle of the garnish stick. The bartender's face is visible in the background, looking down at the drink. The text "PREMIUM DRINKS" is overlaid in large, bold, yellow letters.

PREMIUM DRINKS

PREMIUM DRINKS: THE ISSUES THAT MATTER

1. WATER MANAGEMENT

Water is a huge impact area and dependency for the drinks industry at large – and the world is water stressed. UN SDG Indicator 6.4.2 which addresses water scarcity based on freshwater consumption as a share of available freshwater resources, indicates that the world water stress level is around 18.5%. In the UK, the distillery sector is amongst the biggest industrial water users. Across the globe, winemaking depends on freshwater sources for irrigation as well as washing equipment and facilities, creating high volumes of wastewater that must be treated properly. Businesses should do water footprint assessments, Life Cycle Assessments (LCAs) and implement efficient water management at all stages of the production process. This includes reuse and recycling of water, implementation of cleaner production practices and technological innovation. In addition to tracking water use, the leading luxury brands and suppliers are utilising innovative technologies to monitor and reduce reliance on it.

CASE STUDY: DIAGEO'S USE OF DRONES

Diageo pioneered the use of drones on its agave farms in Jalisco, Mexico to make better informed decisions about how its raw materials are farmed, and how water is dispensed more efficiently.

“AT CELOSA, WE PRIORITISE WATER MANAGEMENT AS A CORNERSTONE OF OUR SUSTAINABLE PRACTICES, RECOGNISING ITS CRITICAL ROLE IN PRESERVING BOTH OUR ENVIRONMENT AND THE QUALITY OF OUR TEQUILA. THROUGH INNOVATIVE SOLUTIONS LIKE BIODIGESTING VINAZAS AND ADVANCED WATER TREATMENT PROCESSES AT OUR DISTILLERY, WE SET A VANGUARD STANDARD FOR DOING THINGS RIGHT – HONORING THE LAND THAT GIVES LIFE TO OUR AGAVE WHILE MINIMISING OUR ECOLOGICAL FOOTPRINT.”

Jose Antonio Alonso Beckmann,
Founder, Celosa Tequila

PREMIUM DRINKS: THE ISSUES THAT MATTER

2. SUSTAINABLE PROCUREMENT

Businesses must strive to source materials from regions which are climate adaptive, conflict-free, and ensuring that people and the planet are taken care of within the value chain. The goal is minimising damage to the environment, generating benefits for society, including local communities, all whilst remaining profitable as a business. In practice, this means always selecting products with a lower footprint compared to others; selecting suppliers and building out the value chain based on a sustainable procurement policy; and implementing and acting towards ESG-informed targets and KPIs. This topic is particularly relevant for the premium drinks industry, as manufacturing and production almost always brings together a multitude of suppliers and manufacturers. It is paramount that all suppliers understand and commit to your business Code of Conduct, and are willing to provide the necessary information to set reduction targets and make sustainability initiatives possible.

CASE STUDY: THE MACALLAN

The Macallan invests in and works with partners who are aligned to its sustainability targets. It asks its secondary packaging suppliers to report on their carbon emissions and align to the SBTi. The Macallan has extensive tracking systems for its casks, and its wood, wood fibre, paper and board materials in its packaging supply chain are sustainably sourced. It has clearly articulated Responsible and Sustainable Packaging and Design Principles, and if a required material or skill can be found locally, its Local Sourcing supply policy determines that it will be sourced locally. In 2023, they even repatriated production of wooden boxes for their Fine & Rare bottlings from China to the UK.

“CONCERNING COURVOISIER, WE PURSUE OUR POSITIVE WAY TO REDUCE OUR IMPACT WITHIN 95% OF OUR SUPPLIERS IN A 500KM RANGE. WE CONTINUE TO LIGHTEN OUR PACKAGING AND MOVE TO LESS IMPACTFUL MATERIAL. WE ALSO SUPPORT AGIR POUR LA FORET, TO UNDERSTAND CLIMATE IMPACT ON THE OAK WITH A FOUR-YEAR PROGRAM.”

Laurent Deligand, Director of Purchasing and Packaging, Courvoisier

PREMIUM DRINKS: THE ISSUES THAT MATTER

3. HUMAN RIGHTS

Upstream of the supply chain, forced labour remains a high risk for the largest food and beverage company supply chains – particularly agriculture. Global value chains (GVCs) stemming from agriculture have some of the largest footprints of informal employment. This means many people who take part in the agricultural processes (the upstream farming of raw materials) going into the production of beverages are informally employed. They are not protected by company policies and structures or given fair wages, working conditions or benefits. It means these vulnerable communities will experience heightened negative impacts from geopolitical shifts, climate events, and economic downturn. Drinks businesses that depend on this informal labour market, and don't have visibility up the supply chain of its people, may be unintentionally supporting the mistreatment of communities – and could face reputational risk.

POSITIVE ACTION: WOMEN COOPERATIVES

According to BSR, “initiating partnerships with women cooperatives to improve agricultural methods without the use of harmful chemicals could lead to more commercially, socially, and environmentally sustainable farming practices. By supporting local community livelihoods, companies can have positive impacts on their families and wider communities.”

“**AGRICULTURE IS ONE OF THE THREE MOST HAZARDOUS WORK SECTORS IN TERMS OF WORK-RELATED DEATHS AND INJURIES.**”

The Food and Agriculture Organisation of the United Nations

PREMIUM DRINKS: KEY FOR 2025

1. SOIL HEALTH

As some of the world's leading premium drinks businesses analyse their risks and opportunities in 2025, soil health remains top of the priority list. Soil is vital to the terroir, which in turn is responsible for the complexity and unique flavour of wines – as well as spirits such as whisky and vodka – setting the exceptional apart from the good. Agroecology contributes to a healthier environment and healthy soils. Soil structure is also vital for vine performance, and good soil health regulates key parts of the grape and vine growing process – it promotes the presence of beneficial microorganisms and facilitates the nitrogen cycle, which leads to better nitrogen fixation and thus can decrease the dependence on fertilisers over time. Soil health is not just critical for growing grapes: monoculture of the blue agave plant can lead to degraded soil over time and increases susceptibility to diseases – posing a risk to tequila companies' yields and supply chain resilience.

CASE STUDY: SOIL HEALTH AT OPUS ONE

“One of the concrete developments is a very nifty kind of recycling system in the form of biochar. Organic waste from the vineyard is reduced using the heat of a huge oven, before being returned to the soil. Carbon sequestration is the key term here; carbon is held in the biomass then put back into the ground, instead of being released into the atmosphere.” Gwendoline La Burthe, Export Manager France, Opus One

“WHAT HAPPENS IN THE VINEYARD IS PARAMOUNT TO CREATING SOMETHING GREAT IN THE BOTTLE, AND THIS IS NOT JUST ABOUT THE TENDING OF THE VINES BUT ALSO THE CARE OF THE SOILS. WITH THE CAREFUL AND CORRECT USE OF COVER CROPS THE STRUCTURE OF THE SOIL IS IMPROVED, BUT MORE IMPORTANTLY THE RIGHT NUTRIENTS AND ORGANIC MATTER RETURN TO THE GROUND.”

Alistair Viner, Independent Wine Consultant

PREMIUM DRINKS: KEY FOR 2025

2. CLIMATE & NET ZERO

Premium drinks manufacturing utilises a lot of energy and emits GHGs through the upstream agricultural practices. Furthermore, global drinks brands contribute to transportation emissions, shipping heavy glass bottles around the world thousands of miles. Many businesses have set targets for 2030 via the Science Based Targets initiative on their pathway to net zero. For example, Pernod Ricard has committed to reduce its absolute scope 1 and 2 GHG emissions 54% by 2030 from a 2022 base year, and aims to achieve net zero across the value chain by 2050. Diageo has committed to reducing absolute scope 1 and 2 GHG emissions 100% by 2030 from a 2020 base year. The group also aims to reach net zero in its direct operations by 2030 as well as its value chain by 2050. Therefore 2025 is a checkpoint towards achieving these targets. Businesses leading the charge are those investing in new approaches to carbon capture, protecting their land and making it more efficient by supporting biodiversity, resource-efficient technologies, and pioneering industry collaboration. Industry collaborations such as the Refresh Alliance – which includes spirits producers Bacardi, Constellation Brands, Diageo, Pernod Ricard, and Whyte & Mackay – will further remove barriers to adopting renewable energy, provide education, and transition supply chains to net zero.

CASE STUDY: BEAM SUNTORY

For its tequila brand Casa Sauza, Beam Suntory is partnering with Red BioTerra and is investing in a pilot programme to maximise carbon capture of agave fields, planting other crops to capture carbon during the day whilst agave captures it at night.

CASE STUDY: THE GLENTURRET REMOVING PEAT

With the Scottish government considering phasing out peat use in Scotch whisky production by 2030, due to its heavy environmental impact both on ecosystem disruption and carbon emissions, Scotland's oldest working distillery – The Glenturret – has begun a transition plan to navigate away from using peated malt in their own production in 2025 and removal of peated expressions from their core range from 2026. Refining their production still allows them to celebrate the rich heritage, craftsmanship and unique terroir of their Perthshire home.

PREMIUM DRINKS: KEY FOR 2025

3. EXPERIENTIAL AND CULTURAL LEADERSHIP

Last year, as global luxury spending remained relatively flat, consumers looked to prioritise experiences over products. And as the luxury consumer increasingly seeks unique retail or leisure experiences, in 2025 the drinks experience will continue fusing with arts and culture. In challenging times, creativity can thrive, becoming a force that connects us. Brand building at the intersection of arts, culture and luxury can increase relevance and deepen relationships with stakeholders. It is about transitioning from merely supporting the arts to actively engaging in and shaping the cultural landscape. There is opportunity for cross-pollination between luxury sectors – from personalised fragrance workshops in private members' clubs, to art installations on vineyards. There is also opportunity to strengthen ties and trust with the local communities through partnerships that build on local culture and arts.

“DONUM OFFERS A UNIQUE, MULTI-DIMENSIONAL EXPERIENCE THAT’S NOT JUST ABOUT TASTING WINE, RATHER IMMERSING ONESELF IN ART, NATURE, AND CULTURE. A KEY PILLAR OF OUR BRAND IDENTITY, ART HOLDS INCREDIBLE VALUE TO OUR BUSINESS, SERVING AS BOTH A SOURCE OF INSPIRATION, AND A POINT OF DIFFERENTIATION. THIS INTEGRATED APPROACH REFLECTS OUR BELIEF IN CELEBRATING NOT ONLY THE CRAFTSMANSHIP OF WINEMAKING BUT ALSO THE BROADER GIFTS OF THE LAND, ART, AND COMMUNITY.”

Angelica de Vere Mabray, CEO, The Donum Estate

CASE STUDY: THE DONUM COLLECTION

The Donum Estate was founded in 2001 on 190 acres of idyllic rolling hills rising up from the San Pablo Bay in California. The winery combines a commitment to healthy, living soils – through regenerative organic farming in order to produce the best expression of its terroir – with one of the world’s largest accessible private sculpture collections. The Donum Collection has become an international destination, comprising of over 60 open-air sculptures and site-specific commissions from globally renowned artists throughout the estate – aiming to galvanise and bring to life the ‘delicate balance between wine, land and art’.

TRAVEL & HOSPITALITY



TRAVEL & HOSPITALITY: THE ISSUES THAT MATTER

1. WASTE & WATER MANAGEMENT

Waste and water management need to be prioritised by travel companies to minimise negative environmental and social impacts. The growing scarcity of freshwater, worsened by overuse, contamination and climate change, poses risks to the industry, especially in water-stressed regions. Travel companies can contribute to water contamination through wastewater discharge, use of harmful chemicals and overconsumption of local water resources, exacerbating strain on already limited supplies. Similarly, waste management, especially concerning plastic and food waste, is critical to reducing environmental pollution and protecting ecosystems. Adopting responsible practices in these areas can lead to cost savings, improve operational efficiency, and contribute to the company's long-term sustainability.

2. SUSTAINABLE PROCUREMENT

Sustainable procurement is material to the travel and hospitality industry as it minimises environmental impact, supports social responsibility, and ensures long-term economic benefits. By sourcing more environmentally friendly, ethically produced goods and services, businesses can reduce their carbon footprint, conserve resources and cut operational costs. It also meets the growing demand from more conscious consumers, enhances brand reputation and supports local communities. Additionally, sustainable procurement helps companies stay compliant with regulations, manage supply chain risks, and promote ethical practices across their operations.

Ultimately, it contributes to the industry's resilience, competitiveness, and future viability in an increasingly sustainability-driven market.

3. PEOPLE MANAGEMENT & HUMAN RIGHTS

People management and human rights are material to the travel and hospitality industry because they directly impact the quality of service, employee well-being, brand reputation, and overall business success. Effective people management ensures that employees are well-trained, motivated, and treated fairly, which translates into better guest experiences, higher customer satisfaction, and lower turnover. In the context of human rights, the industry must ensure ethical treatment of workers, respect for fair labour practices and the protection of vulnerable groups – particularly in destinations with at-risk populations. Upholding human rights not only prevents legal and reputational risks but also fosters a positive work environment. Conscious consumers are attracted to and prioritise businesses that respect workers' rights. As travellers become more aware of social and labour issues, companies that adopt responsible people management practices and advocate for human rights can gain a competitive edge and strengthen their brand image, ensuring long-term sustainability and customer loyalty.

TRAVEL & HOSPITALITY: KEY FOR 2025

1. WASTE & WATER MANAGEMENT

With over 30% of consumers saying they are ready to change the way they travel for environmental reasons, in 2025 there is an increasing pressure on hotels and resorts to action change. Currently, 25 countries – home to nearly a quarter of the world's population – are experiencing severe water stress each year. This has placed water resilience as one of the five key focus areas of the UN Global Compact's Forward Faster initiative. As sustainability becomes a priority for travellers, hotels and resorts are increasingly being held accountable for their waste management practices. Many are adopting more sustainable solutions using technology and AI. These can be applied across multiple touchpoints of the guest experience to reduce waste and improve guest experience. Adopting responsible practices in these areas not only ensures compliance with tightening regulations but also enhances the hotel's reputation, attracts more eco-conscious guests and drives cost savings – supporting long-term business sustainability.

CASE STUDY: MARRIOTT LONDON & WINNOW

London's Marriott Hotel Canary Wharf took action to reduce food waste, partnering with Winnow to achieve a remarkable 67% reduction in food waste within just six months. The technology offers real-time insights into food waste patterns to make smarter decisions, reduce waste, reduce costs and improve efficiency – as well as creating an important mindset shift across hotel departments. It also resulted in more culinary creativity and innovation – using leftover trimming and food that would normally be discarded to create new, stand-out dishes.

TRAVEL & HOSPITALITY: KEY FOR 2025

2. BLOCKCHAIN & AI PREDICTIVE ANALYTICS FOR SUSTAINABLE PROCUREMENT

Blockchain and AI predictive analytics are set to revolutionise sustainable procurement in the luxury travel sector, enhancing efficiency, transparency, and ethical practices across the industry. AI will also help luxury travel brands assess the sustainability credentials of suppliers, including hotels, airlines, and service providers. Blockchain can then verify and audit these suppliers' environmental and social practices. AI-powered predictive analytics will help luxury travel companies forecast demand more accurately, reducing overbooking and unnecessary resource consumption. Both AI and blockchain will track sustainability metrics – such as carbon emissions and energy usage – across the travel experience. Blockchain stores this data securely, while AI can generate real-time reports on sustainability performance, ensuring that brands can showcase their commitment to sustainable practices and comply with required standards. These technologies will enable a more responsible, efficient, and sustainable luxury travel experience.



TRAVEL & HOSPITALITY: KEY FOR 2025

3. PEOPLE & COMMUNITY

Impact tourism and a people- and culture-centric approach to destination exploration will be a key differentiator for luxury travel brands, as travellers increasingly seek authentic, immersive experiences that connect them to local communities and cultures. Ultimately, this will foster long-term loyalty and positively impact the destinations they serve. Luxury brands can offer curated, culturally immersive experiences – such as private meetings with local artisans, traditional cooking classes, or exclusive access to festivals and rituals. These personalised experiences will create memorable connections with the destination, setting luxury brands apart in a competitive market. By emphasising cultural respect and inclusivity, luxury brands can foster responsible tourism practices that benefit both the traveller and the local community. Offering experiences that are aligned with local customs, traditions, and values will ensure travellers are respectful and engage in ways that promote cultural preservation, highlight local heritage, and contribute to the economic development of local communities.

CASE STUDY: CANDAGRAIG

The Scottish highland escape, Candacraig, who have worked with Positive Luxury for over two years, connect to the local community and culture beautifully. Not only is the retreat perfect for those who want to reconnect with nature while they travel, with local foraging walks, stargazing and wild swimming on offer – but local culture is also celebrated through historical tours and craft workshops. This ensures on-stay experiences showcase and protect the heritage and legacy of the area.

“**WE TRY TO INTEGRATE THE LOCAL COMMUNITY INTO OUR GUEST EXPERIENCES, WHETHER IT IS THROUGH DINING EXPERIENCES – WE USE LOCAL FARMERS THAT ARE HIGHLANDERS – OR THROUGH OUR MANY ACTIVITIES. WE CELEBRATE LOCAL HERITAGE BY HOSTING CEILIDHS, WHICH IS A FUN WAY TO CONNECT GUESTS INTO THE LOCAL CULTURE. THE MORE AUTHENTIC THESE EXPERIENCES ARE, THE MORE CLIENTS SEEM TO ENJOY THEM.**”

Scott Robertson, General Manager, Candacraig

CONTACT US

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