論文 EyesOn

01

Green is the new Gold: how EU, China, and US Regulations are Challenging Global Beauty Brands – and Redefining the Luxury Playbook

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Luxury beauty is undergoing a fundamental shift. Sustainability has become the key driver of transformation in the global beauty industry. Proof, transparency, and impact define the new codes of desirability. This article examines how global regulations and evolving consumer expectations are driving innovation across the industry. It presents methods and best practices for aligning science, sustainability, and storytelling to create products that embody the next generation of responsible luxury.

The bigger the box, the more desirable?

When sustainability regulations become drivers of desire.

A few years ago, at the Globus counter of an ultra-luxury skincare brand in Zürich, I witnessed an 80-year-old woman cause a stir. After purchasing her usual premium cream, she handed back each layer of ornate packaging such as ribbons, cartons, inserts to the surprised beauty advisor. "*I love your brand, and I buy your products because they work*", she said. "*But all this? It's just waste. It's really not sustainable*".

What was once unthinkable in luxury, questioning the very codes that define its aesthetics, has become inevitable: consumers are no longer willing to accept beauty without clear and transparent climate accountability from brands.

When Daniel Esty and Andrew Winston published *Green to Gold* in 2006 [2], they argued that ecology could be not only an obligation but also an opportunity. Nearly two decades later, their thesis feels prophetic. From Brussels to Beijing, regulators are turning sustainability into a matter of legal obligation, forcing even the most heritage-rich maisons to redesign their value chains. As we step into this new era, the question is clear: how can luxury brands transform a compliance challenge into a brand-defining opportunity?

Regulation as the New Driver of Luxury

Amid political turmoil and shifting consumer values, sustainability is no longer a footnote to luxury, it is the new frontier of desirability.

Europe: Building the strictest frameworks

The European Union is raising the bar through frameworks like the Corporate Sustainability Reporting Directive (CSRD), the Ecodesign for Sustainable Products Regulation (ESPR), and in particular, evolving rules under the Packaging and Packaging Waste Regulation (PPWR). These instruments demand full-spectrum traceability of carbon, chemicals, packaging, and processes. PPWR in particular is forcing brands to rethink how packaging is designed, reused, and recycled. Further EU regulators include more and more environmental laws revisiting more and more ingredients based on their environmental criteria's such as persistence.

China: Regulation aligned with "dual carbon" goals

China is pursuing its "dual carbon" targets carbon *peaking by 2030 and carbon neutrality by 2060* (State Council of China, 2020). Regulatory change is rapid and closely tied to this national strategy, pushing industries, including beauty, toward cleaner formulations, renewable energy use, and transparent sourcing. Coupled with an eco-conscious middle class, this is creating a powerful pressure cooker for global brands. The relaxation of animal testing requirements opens the door to cruelty-free certification but also reinforces the need for traceable and safe ingredients.

United States: A fragmented but unavoidable challenge

In the US, Extended Producer Responsibility (EPR) laws are spreading state by state, creating a fragmented patchwork of obligations. While less centralized than Europe or China, investor pressure and consumer activism are forcing luxury brands to exceed compliance and adopt higher internal standards. For global maisons, the US remains a market where voluntary leadership matters as much as legal requirements.

New Challengers, New Codes:

How indie and niche Brands Are Redefining Luxury

Across Europe and Asia, niche and agile players are moving faster than heritage houses. They are reshaping expectations and forcing the entire industry to adapt. Just to quote a few:

- **La Bouche Rouge (**Paris) pioneered plastic-free, refillable lipstick in leather cases, setting the benchmark for luxury sustainability.

- **Seed to Skin** (Tuscany) follows a farm-to-face model, growing medicinal plants on the Borgo Santo Pietro estate and transforming them through advanced green science into luxury formulations.

- **Susanne Kaufmann** (Austria) manufactures Alpine-inspired skincare in the Bregenzerwald with renewable energy and refillable packaging.

- **Haeckels** (UK) blends experimental design with ocean responsibility, using seaweed, biodegradable packaging, and community projects.

- **THREE Cosmetics** (Japan) offers holistic J-beauty with over 80% natural-origin formulations and minimalist packaging.

- **Herborist's TaiChi line** (China) combines traditional Chinese medicine with recyclable packaging and eco-conscious retail design.

These indie players prove that exclusivity and ecological responsibility can go hand in hand. They are not just carving niches. They are forcing global giants to move faster.

And many leading maisons have already stepped up with striking sustainability initiatives:

- **CHANEL – N°1 de CHANEL**: The line is a showcase of eco-design. The Red Camellia active is cultivated using regenerative agriculture methods. The formulas are water-conscious and contain up to 97% ingredients of natural origin. Packaging is deliberately minimized: thinner glass, lighter caps, and refillable jars that cut CO_2 emissions by nearly 50% compared to single-use formats.

- **La Prairie – Life Matrix Haute-Rejuvenation Cream**: In 2024, La Prairie unveiled its first jar made from 100% recycled aluminum. A pioneering step for ultra-prestige skincare. Aluminum not only reduces dependence on virgin resources but is also infinitely recyclable, setting a new benchmark for circular design at the highest end of the market.

- **L'Oréal Luxe – Refill-First Policy**: L'Oréal has committed to a refill-first innovation strategy across its luxury portfolio (Lancôme, Helena Rubinstein, Yves Saint Laurent Beauté, Armani Beauty). By 2025, all major launches must integrate refill systems. Lancôme's *Absolue Soft Cream* refills, for example, allow clients to keep their ornate jar while reducing packaging-related CO_2 emissions by 51% and material use by 45%.

- **Clarins – Domaine Clarins & Alpine Laboratory**: Clarins has developed its own open-air laboratory in the French Alps, cultivating over 200 plant species under organic and regenerative practices. Ingredients like Alpine plants are used in skincare lines such as *Double Serum*. The lab ensures short supply chains, transparent sourcing, and formulas grounded in local biodiversity – all linked to sustainable packaging solutions.

- **L'Occitane – Eco-Refill Ecosystem**: L'Occitane pioneered the concept of eco-refills in luxury personal care as early as 2008. Today, these flexible pouches use up to 90% less plastic than traditional bottles and are available for bestsellers like *Almond Shower Oil* and *Immortelle Divine Cream*. The company has expanded refill stations in boutiques worldwide, turning sustainable packaging into a client-facing retail experience.

- **Guerlain's IFE index** ensures measurable naturality, safety, and biodegradability.

This shift also demands proof. Digital Product Passports and traceability systems are turning sustainability into a premium feature. The era of greenwashing is over: the new craft of luxury is "greencrafting," where ecological rigor becomes part of design heritage.

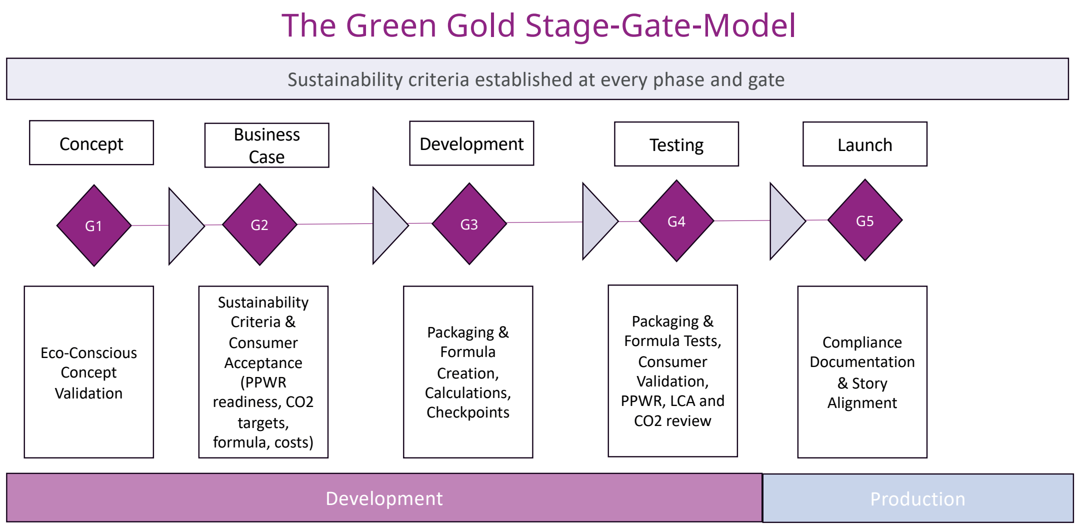
Together, these examples show how the codes of luxury, which were once defined by abundance and ornament, are being rewritten around precision, proof, and ecological intelligence.

The Green-to-Gold Innovation Framework

The new Gold standard lies in structured creativity. In this sense, "green is the new gold" is not a metaphor, but a method: the rarest value is not heritage or indulgence alone, but the ability to innovate responsibly and credibly in a world that demands proof at every step. Brands that can prove concepts rigorously, balance portfolios wisely, and integrate sustainability into every gate will not only survive regulation and consumer scrutiny but set the new standards of desirability. Sustainability has become the currency of modern luxury, but ideals alone do not create lasting maisons. As Robert G. Cooper showed in *Winning at New Products* [3], the difference between winners and failures lies in disciplined innovation systems.

For beauty brands navigating the "green gold" era, five principles stand out (Figure 1):

1. **Start with a meaningful concept, not a formula**: the most successful brands begin with a clear, consumer-driven concept anchored in unmet needs. In luxury skincare, this means more than indulgence: it means performance proven by science, ecological



■**Fig. 1　Modified Stage-Gate model.**

credibility, and a narrative that resonates globally. The concept must be simple, compelling, and defensible. A single promise that can carry a line.

2. Proof before passion.

Cooper's research shows that weak front-end discipline is the main reason for failure. For eco-luxury brands, proof must cover three dimensions:

- *Scientific efficacy* (clinicals, biotech validation, dermatological studies)
- *Eco-proof* (carbon footprint, refill system validation, sourcing traceability)
- *Market resonance* (concept tests, willingness-to-pay in selective segments)

3. Stage-gate as a system, not bureaucracy.

The stage-gate model, long applied in FMCG, gains new importance in luxury. Each gate becomes an opportunity to integrate eco-criteria alongside performance and cost. For example the Gate Business Case should already test whether the packaging system meets future PPWR standards, and Gate Development should lock sustainability metrics (PCR %, refill cycles, CO_2 reduction) alongside sensorial and efficacy claims. This disciplined governance allows maisons to balance heritage creativity with the rigour of eco-innovation.

4. Think in portfolios, not one-offs.

In the past, a single hero product could secure decades of brand prestige. In the eco-luxury era, brands must manage balanced portfolios: breakthrough eco-innovations (new materials, biotech actives), platform innovations (refillable systems, cross-category rituals), and continuous improvements (footprint reductions). This portfolio view spreads risk and ensures ongoing consumer relevance (Figure 2).

5. Learn fast, fail small.

Agility is not just for start-ups. Luxury brands must embrace limited pre-launch markets, digital twins, and consumer co-creation panels to test eco-concepts early, without compromising prestige. Here, proof-of-concept packages structured test phases that combine lab validation with consumer insights can dramatically cut risk.

The Future of Luxury Is Measured in Impact

Luxury has always been about more than utility. It is about values, craft, and cultural leader-

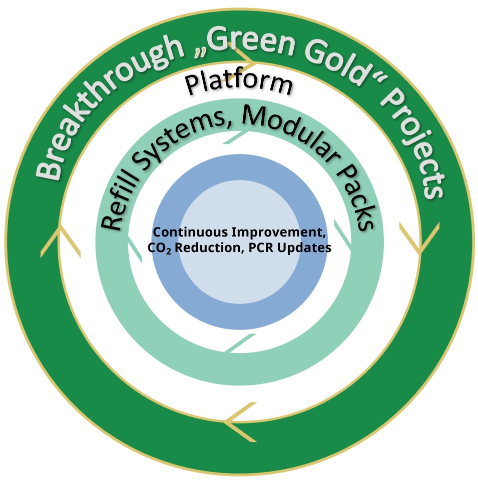


Fig. 2 Balanced Portfolio Wheel

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Strengths that drive brands forward: sustainability and the implementation of Green Deal packaging requirements, efficient innovation management, and a high-performing R&D organization.

For greater capability, greater efficiency, and greater innovative power.

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ship. In the age of regulation, the most desirable brands will be those that blend emotional resonance with environmental relevance. According to McKinsey [4) nearly 40% of consumers look for natural ingredients when buying beauty products, with 20% looking for organic ingredients globally.

Green is no longer just a story, it is a method. The rarest value today is the ability to innovate responsibly and credibly in a world that demands proof at every step. Success will belong to those who turn compliance into culture, who connect ecological responsibility with heritage and science, and who make impact the new benchmark of desirability. In this evolution, sustainability is not the opposite of luxury: It is luxury's next frontier.

References:

1) This image was generated using artificial intelligence for illustrative purposes only. The depicted products and trademarks, namely La Prairie Life Matrix Haute Rejuvenation cream, Chanel No. 1 Serum Revitalisant, La Bouche Rouge Lipstick, are AI-generated representations and do not correspond to actual products or official visuals of the above mentioned brands. All brand names and trademarks mentioned remain the property of their respective owners. This content is not affiliated with, endorsed by, or associated with the companies mentioned above.
2) *D. Esty, A. Winston;* Green to Gold, Wiley 2006
3) R. Cooper; Winning at new products, Basic Books,2005
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