

THE
COURAGE
TO
CHANGE

BRITISH
SUPPORTING A SUCCESSFUL, INNOVATIVE
BEAUTY
AND INCLUSIVE BRITISH BEAUTY INDUSTRY
COUNCIL

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TO ALL OF US

2020 IS THE YEAR THAT THE WORLD CHANGED, FOREVER. The global pandemic brought into sharp focus so much about our ways of being that need to change in order for our communities and our planet to recover and thrive. This comes hot on the tail of global climate strikes and Black Lives Matter protests. We cannot go back to the way things were. This is our chance to make things better.

The beauty industry has at its heart the belief that true beauty is intrinsic to each one of us and to the world we live in – our job is to ensure that this beauty can shine.

We must work together to make this change and we must work with the urgency that the situation demands. We know now that extraordinary change can happen fast. It will take commitment, courage and collaboration if we are to reach our highest goals.

We have commissioned this sustainability report, with a focus on the environment, to set us on the right path. The analysis and recommendations are based on new Beauty British Council commissioned research conducted by Hubbub¹⁰, desk research of the many initiatives that already exist, interviews with voices inside and outside the industry and a think tank discussion with 40 participants.

In the following pages, we lay out a vision of how we can move forward together to create an industry that nurtures the planet that we love and all that live on it.

We urge you to join us on this journey.

Best,
Anna & Millie

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

From the global pandemic, to Black Lives Matter protests, to unprecedented forest fires, 2020 is proving to be a year that won't let us hide from the havoc we have reaped on planet earth.

Everyone has a part to play in turning things around. The beauty industry perhaps more than most because its purpose is to encourage the intrinsic beauty of people and our planet to shine.

The industry must play its part in bringing about bold, urgent change.

Consumers are keen to see this happen. They are looking to the industry to take a lead. Around two-thirds of consumers want brands to do more in helping their cause to improve the planet.

They are also willing to do their part. Of those surveyed who changed beauty products in the three months from April to July 2020, 1 in 7 bought a new product as they wanted to use a more environmentally friendly product/brand. The research also highlighted that already taking a number of actions to be more considerate of the environment in the use of their beauty and grooming products. For example 70% of those surveyed reported that they currently turn the tap off when brushing their teeth/ washing their face.

The industry is taking steps towards a more sustainable future. There are a growing number of examples of brands taking significant steps to reduce the negative impact of the ingredients they use, be more transparent about how they source their raw materials, change packaging to reduce & recycle and use water more responsibly.

However, these efforts are still too patchy and uncoordinated.

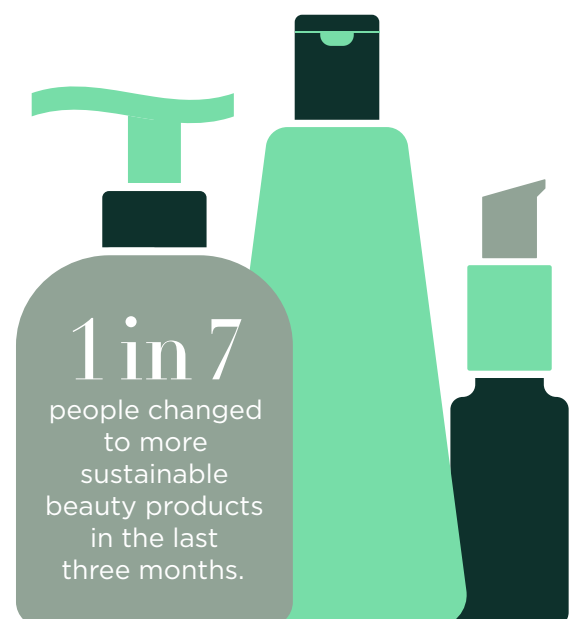
We must move forward with courage. We must move forward together, from the smallest independent, to the largest corporate brand. This is imperative if the industry is to step up when the beautiful, bountiful planet we depend on needs us.

AND SO WE ARE CALLING FOR:

- The industry to collaborate through a Sustainable Beauty Coalition.
- Individual brands to do more to improve the impact of their products and support consumers to make better choices.
- Consumers to choose positively impactful products, to use them wisely and to engage with brands on the issues they care about.

“Be courageous. It's one of the only places left uncrowded.”

Anita Roddick, Founder, the Body Shop





THE CASE FOR CHANGE

Photo by Justus Menke on Unsplash

“I WANT YOU TO ACT AS IF THE HOUSE IS ON FIRE”

- Greta Thunberg

So demanded Greta Thunberg of those collected at Davos in January 2019 and of the rest of the world.¹

She was speaking of the urgent need to make wide-reaching and fundamental changes to halt the negative impacts of human activity on our planet.

Nearly two years later the movement she speaks for continues to gather momentum. Consumer awareness is growing as information and understanding spread. People are using their purchasing power to put pressure on brands to change. As younger people gain in spending power this pressure will only increase.

The global pandemic has shifted this dynamic further still. People are buying what they need not what they desire. There is a growing interest in consuming more responsibly. Consumers want to know how brands are useful to society.

For beauty brands, the risk of not changing is starting to outweigh the risk of changing, uncertain and fraught with challenges as it may be.

While the implications of climate change and biodiversity loss once seemed distant possibilities, they are increasingly affecting the beauty industry in tangible ways.

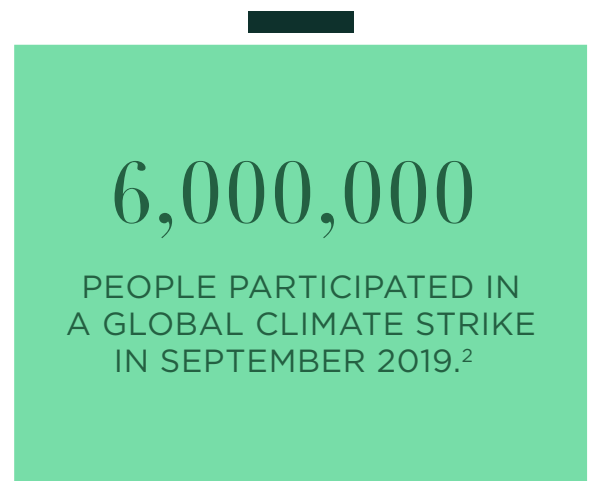
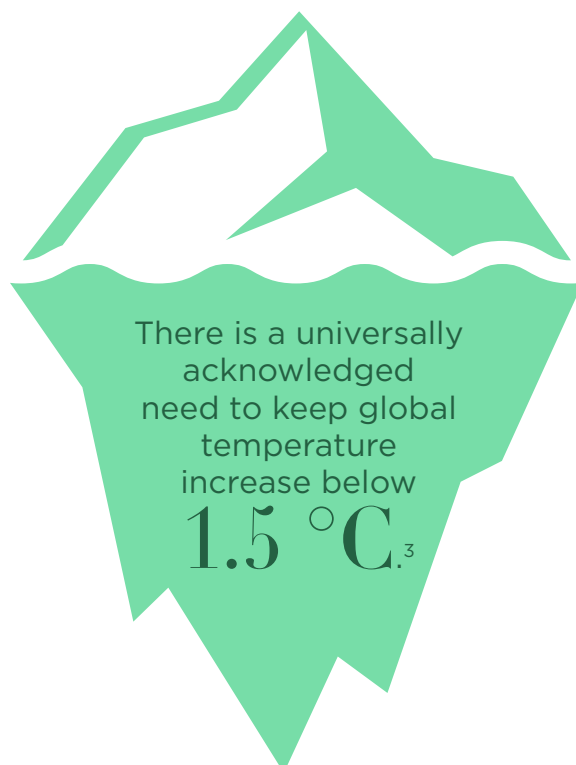
Hard won protections, such as against animal cruelty, are being worn away by changes in legislation and practice.

Intersectional environmentalism (see Definitions) is surging to the forefront.

“We are past the point where incremental change is appropriate. Now is the time for drastic and radical systematic change.” - Arizona Muse

Disadvantaged individuals and communities suffer the impacts of climate change and environmental harm first and hardest.

The beauty industry must acknowledge all of these factors in the path it takes to putting out the fire.



DECLARING A CLIMATE EMERGENCY

On 1 May 2019, the UK Parliament declared a climate emergency. As a result, the Government's aim is "to ramp up ambition towards a climate-resilient, zero-carbon economy."⁴ The UK was the first major economy to legislate for net zero emissions by 2050.

Worth £28.4 billion in 2018, the British beauty industry makes up 1.3% of the country's GDP.⁵ It has the potential to play a powerful role in achieving our national sustainability goals.

As an industry, beauty touches every single UK citizen in some way, whether as an employee, a supplier, an investor or a consumer. With health and wellbeing at its core, the industry has unique scope to speak to individuals. It can offer inspiring leadership to catalyse change that will ripple far and wide.

Such leadership demands that the industry engages with this work because of a fundamental belief that it is the right thing to do. We have to acknowledge the climate and ecological crisis that the world is facing.

It will take courage and resolve because sometimes it will mean making difficult decisions. It will challenge brands to think differently about their relationships with consumers and their supply chain. It may mean completely rethinking their business model.

It will involve collaborating with those in the industry's wider ecosystem, so that everyone is able to make decisions that are good for the planet.

"We can turn the beauty industry into something that's really positive, so that we can say hand on heart that our industry is a force for positive change in the world."

- Jayn Sterland, Weleda



THE BUSINESS CASE FOR CHANGE

Once a predominantly long-term concern, or thought of as unnecessary expenditure, changing conditions are bringing sustainability-related issues to the forefront of business considerations.

Supply chain vulnerabilities, highlighted even further by the global pandemic, are being exacerbated by environmental changes resulting from climate change and biodiversity loss.

Ingredients, both rare and more common, are being affected by changing weather patterns and over-consumption. Increases in flooding and drought are heavily impacting not only agriculture, but also manufacturing.

Access to water is a growing challenge. This is of particular concern to the beauty industry, which is such a high volume user. Scarce resources are expensive ones, so it will make less and less business sense to persist with outdated practices.

The economic benefits of responding positively to these challenges are also emerging. Research suggests that companies experience an average internal rate of return of between 27% and 80% on their low carbon investments.⁷

Savings can be unlocked by changes in practice driven by sustainability concerns – often through operational efficiencies.⁷ Encouraging innovation in response to

these new challenges can give rise to unexpected gains. Lab-based or synthetic alternatives, for example, can be far more cost-effective than extracting or harvesting raw materials.

Consumer purchasing decisions are increasingly informed by sustainability concerns. Unilever has found its purpose-driven brands are growing at twice the rate of its other product lines.⁸

B Corp certified brands in the UK grew 28 times faster than the national economic growth of 0.5% in 2018.⁹

The global natural beauty market is estimated to hit £17 billion by 2024.¹⁰

Research suggests that companies experience an average internal rate of return between 27% and 80% on their low carbon investments.⁷

The value at stake from sustainability concerns can be **as high as 70%** of earnings.⁷

“The moment for an expanded view of value creation has come.”

Michael Porter and Mark Kramer,
Creating Shared Value

CONSUMERS ARE LOOKING FOR INDUSTRY LEADERSHIP

Consumers are concerned about the impact of their beauty products, from cruelty to animals, to packaging and recycling.

Research by sustainability agency, Futerra, found that 88% of consumers want brands to do more to help them make a difference. This includes:

- Use less packaging.
- Display clearer information on how to recycle products.
- Provide information on more environmentally friendly ways to use products.

Part of the answer lies in more fundamental consumption choices. Almost a third of consumers are prepared to buy fewer cosmetic products to reduce their environmental footprint.¹¹

This suggests that there are exciting opportunities to explore what this dynamic means for some of the fundamental aspects of how the beauty industry does business.

The beauty industry has the power to galvanise more sustainable choices and behaviours among its customers.

There is much that consumers are ready and willing to do. The global pandemic has enhanced this further. In the three months from April to July 2020, the Hubbub survey identified that 1 in 7 people have changed to a more environmentally friendly cosmetic product.¹¹

“This isn’t about what consumers want and expect now, we need to be looking ahead to the consumer expectations of the future. If we don’t do that, we won’t survive.” - Phil Cumming, WBA

However, people struggle to make good decisions for a number of reasons. About a third believe it is too expensive to make the switch. Around a third of consumers would be prepared to pay more for some changes, including:

- Fair-Trade ingredients,
- Sustainable palm oil or substitutes,
- Refillable containers and in-store refill options



CONSUMER ENGAGEMENT WITH SUSTAINABILITY

EXPECTATIONS

The main priority for people when choosing cosmetics is trusting the brand.

Unilever found 90% of Gen Z consumers expect brands to do more to help reduce climate impact and improve the state of the world.

In a survey conducted by Hubbub with 3,000 representative UK adults, 39% of people think that brands should produce more environmentally friendly products.¹¹

The research identifies consumers' top environmental concerns as cruelty to animals, too much plastic or unrecyclable packaging and ocean pollution.

Lack of transparency is a problem. Two thirds of people aren't clear which cosmetic products can be recycled.

BEHAVIOURS

Research from Garnier found that 56% of British people currently don't recycle bathroom waste such as shampoo, conditioner and shower gel bottles simply because it's inconvenient to do so.¹³

However, there is considerable will to change. The Hubbub research identified that:

- 31% of people would be willing to reduce the number of products they buy.
- 59% of people say they would be willing to refill their beauty and grooming products.
- 40% are prepared to use reusable cotton pads or a flannel.¹¹





OUR CURRENT IMPACT

Photo by Brian Yurasits on Unsplash

WHAT GOES IN...

INGREDIENTS FROM NATURE

Argan to frankincense, sandalwood to vetiver. The beauty industry is a celebration of the many and varied natural ingredients that can be found around the world.

Unsustainable production, for example of palm oil, is leading to extensive destruction of natural habitats through industrial deforestation. Many alternatives, such as coconut, soy bean and rapeseed, themselves have a significant negative impact as they are less efficient to produce.¹⁴

Over-consumption, non-regenerative farming practices, pollution, waste and neglect are all threatening the delicate balance of ecosystems and with it, the fates of plants, insects, birds and animals. A recent WWF report suggests wildlife populations have plummeted 68% since 1970 and continue on this trajectory.¹⁴

Animal cruelty is the most significant environmental issue for consumers according to the Hubbub research.¹¹

SYNTHETIC INGREDIENTS

The complex ingredients list of many products highlights that a significant number of synthetic chemicals are present. These can cause harm when released into the natural environment.

For example, oxybenzone used in sunscreen is destroying coral reefs around the globe. Whether washed off in the shower or ocean, it is extremely potent – a single drop in six and a half Olympic-size swimming pools is enough to be deadly.¹⁶

Ingredients like parabens cause harm once they are washed off and into our river and ocean systems. Concerns have been raised on the impact of synthetic ingredients on aquatic life. Ingredients such as parabens are commonly found in both marine animals and UK freshwater, more research is needed to find out the full cost to our environment. Using these fossil fuel-based ingredients has a significant carbon footprint. Unilever estimates that 46% of its carbon footprint arises from the ingredients in its products.¹⁷



WHAT COMES WITH...

PLASTIC & PACKAGING

From microbeads to pump-action soap dispensers, plastics play a central role in shaping, preserving and delivering beauty products. However, we are all keenly aware of the damage plastic is doing to our oceans and wildlife.

Plastic is accumulating in the oceans of the planet so quickly it is predicted that by 2050 the mass of plastic in the world's oceans will exceed the mass of all the fish.

“If current levels of consumption continue, by 2050 there will be 12 billion tons of plastic in landfills, equivalent to 35,000 Empire State Buildings.”

- UN Environment Programme

Other forms of packaging are not without negative impact. For a start, packaging forms 70% of the industry's waste.¹⁹ Cardboard and paper packaging contributes to the loss of 18 million acres of forest each year.²⁰

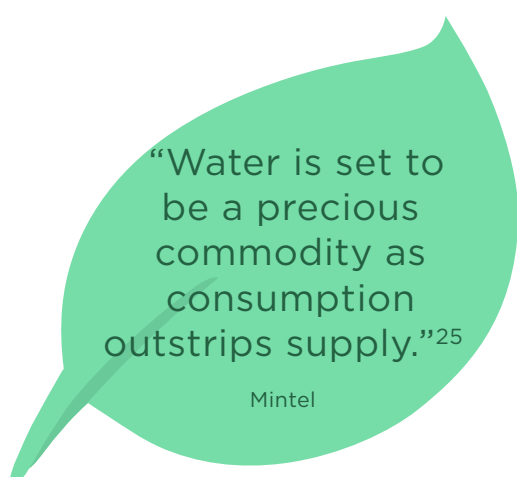
Every year, 120 billion units of packaging are produced by the global cosmetics industry.¹²

WATER

The most commonly used ingredient in beauty products, water makes up about 70% of most products.²² Large quantities are also required for the manufacturing of many of the synthetic materials that go into the products.

It is present at every stage of a product's life, from creation to use to disposal. The scale of demand for water is not always proportional to the amount available in the regions where it is being used.

The average British person can use up to 142 litres of water a day.²³ The water we use with products in the bath, shower or sink, as well as in processing and manufacturing, washes into our rivers and oceans. With it go chemicals, toxins and other pollutants that are damaging vital ecosystems that we all depend on.



WHAT COMES OUT...

WASTE

Waste in the beauty industry manifests in many ways. Product design is often driven by sales and marketing priorities, rather than sustainability considerations.

There are numerous examples of the use of glass, plastic and other materials that are unrecyclable because of their colour, composition and design – chosen to entice or convenience consumers. These end up in landfills.

The drive to sell more means that people buy things they don't need or want. Almost two thirds of people have unused or partly used beauty products in their home that they no longer want.

Most people have been given a beauty product as a gift that they will never use.¹⁰

Single use items, such as razors, wet wipes and cotton buds, as well as “minis” are all responsible for creating unnecessary waste, much of which has the potential to end up in our oceans or earth.

British people use 1.1 billion wet wipes and 1.8 billion plastic-stemmed cotton buds a year.²⁷

POLLUTION

There is a growing understanding of the contribution of beauty products to air pollution. Recent research has found that perfumes, hairsprays and deodorants pollute the environment as much as car emissions.²⁸

Processes used to extract the raw materials for ingredients and plastics are having deadly impacts on the natural environment. This includes the side-effects of fracking, used to extract fossil fuels, such as the release of toxins into the land and waterways. The dangerous processes required to produce plastics also create risks of chemical leaks and fires, which can damage the areas around the processing plants.²⁹

Other industries, such as agriculture and transport, are increasingly heavily regulated, leaving the beauty industry as an ever more significant source of pollutants.

A pot of moisturiser takes

1,000

years to decompose.²⁶

Scented products emit the same level of chemical vapours as vehicle petroleum emissions **from cars.**²⁸



THE WIDER MOVEMENT FOR CHANGE

Photo by Callum Shaw on Unsplash

THE BIGGER VISION FOR PEOPLE & PLANET

By committing to collective action to reduce negative and increase positive impact on the environment and climate change, the British beauty industry is part of a global movement for change.

The Sustainable Development Goals, the “world’s To Do list for a better and more sustainable future for all,” were adopted by all UN Member States in 2015 as part of the 2030 Agenda for Sustainable Development. The 17 transformational goals are a call to action to promote prosperity while protecting the planet.³⁰

At the SDG Summit in September 2019, with progress lagging, world leaders called for a Decade of Action.

At the Paris climate conference in 2015, countries adopted an international agreement, known as the Paris Agreement to address climate change that aims to limit global temperature rise to 2 degrees Celsius, while making best efforts to keep it to 1.5 degrees Celsius.²

Science-based targets are a way of making a contribution to reducing global emissions to keep warming below the 2 degrees Celsius goal and pursue efforts to limit warming to 1.5 degrees Celsius.

Planetary boundaries describe the “safe operating space for humanity,” setting out limits which cannot be crossed if earth is to remain habitable in terms of factors including biodiversity loss, deforestation and water and air pollution.³¹

Economist, Kate Raworth based her “Doughnut” economic model on these planetary boundaries, and a series of social foundations that set limits below which humans cannot thrive, for example in terms of access to food and clean water.³²

L’Oreal for the Future

In June 2020, L’Oreal released its new sustainability strategy, which is explicitly based on respect for planetary boundaries.³⁴



LEARNING FROM OTHER INDUSTRIES

Collaborations across businesses in other industries have succeeded in developing focused initiatives that drive collective action to areas with greatest potential for meaningful impact.

Brands from across the **fashion and textile sectors** signed the Fashion Pact committing to a common core of key environmental goals in three areas: stopping global warming, restoring biodiversity and protecting the oceans. The Sustainable Apparel Coalition³⁵ brings together members from across the fashion industry to collectively measure and improve social and environmental impacts.

Almost 200 **banks** have signed the Principles for Responsible Banking, while over 3,000 businesses in the **investment sector** have signed up to the Principles for Responsible Investment.³⁶ Both initiatives set out principles to establish industry-wide behavioural norms and to drive continuous improvement in business practices.

All of these initiatives deliberately harness the power of collective action by companies within a sector.

It is only through collaboration (partnership is the 17th Sustainable Development Goal) that companies can tackle the highly complex problems that beset individual industries and make the systemic changes needed.

“There is no ‘Plan B’ because we don’t have a ‘Planet B’.”

- UN Secretary-General Ban Ki-Moon

To be most effective, the plan of action for the beauty industry must focus on where the industry can effect the greatest change - the issues that are material to the impact that it has.

For the beauty industry, the areas of greatest environmental impact relate to the following Sustainable Development Goals:



“What matters is that today we can be more confident that this planet is going to be in better shape for the next generation.”

- Barack Obama on signing the Paris Agreement

A close-up photograph of a group of children, likely in a classroom or play area. They are all smiling and have their hands raised in the air. The children are wearing various colorful clothing. A large, white, stylized graphic element, resembling a thick exclamation point or a large number '4', is overlaid on the right side of the image. The text 'WHAT'S ALREADY UNDERWAY' is written in white, uppercase letters across the middle of the image, partially overlapping the children's faces and the graphic.

WHAT'S
ALREADY
UNDERWAY

Photo by Larm Rmah on Unsplash

COLLABORATING EFFECTIVELY FOR CHANGE

The challenges may be huge, but the beauty industry connects so many people from all around the world. From farmers to lorry drivers, shop assistants to make-up artists to someone taking a shower in the morning, there are opportunities for everyone who works in the beauty industry, or uses its products, to make a difference.

By taking a lead, the beauty industry can rally a movement of people behind a clear vision for the impact that it wants to have. Together, brands from across the industry have the resources, knowledge and skills to achieve the kinds of substantial and fundamental changes that the situation demands.

This begins with a commitment from brands to do this work, and do it together.

There are already examples of exciting collaborations that are making significant progress in the beauty industry and beyond which can provide models to build on.

To make the positive difference, at the pace that is required, there needs to be a bold commitment in line with the scale of the challenge, a shared framework for action and collaboration across the industry to deliver it.

“The industry stands for making people feel good about themselves. This manifests itself in many ways. It might be treating yourself to a lipstick, but it goes much deeper than that. The footprint that you leave behind is in many ways at the core of feeling good about yourself.” - Anna Teal, WBA

New Plastic Economy

(Ellen MacArthur Foundation)

More than 850 organisations united behind a common vision and targets for a circular economy for plastic.³⁷



Driving Towards a Net Positive Cosmetics Industry

(Cosmetic, Toiletry and Perfumery Association & Forum for the Future)

The Association is bringing members together to share best practice and drive system-wide change.³⁹



SPICE

(L’Oreal & Quantis)

Twenty four global members co-create methodologies and tools to drive the future of sustainable packaging for cosmetics.³⁸



CREATING POSITIVE IMPACT THROUGHOUT THE VALUE CHAIN

Some brands are already collaborating to drive change with stakeholders at all stages of their business. Starting with raw materials at the early manufacturing stages, right through to working with retailers and consumers to ensure safe use and disposal of the products they buy.

ENGAGING SUPPLIERS IN THE SUSTAINABILITY JOURNEY

The scale and variety of businesses in the supply chain offers enormous opportunity to generate positive change. Unilever developed a Sustainable Agriculture Code to encourage sustainable sourcing, create supply chain security, and manage the environmental footprint for the 7 million tons of agricultural raw materials it uses to make its products.⁴⁰

Beauty brand BYBI uses an internal ingredient grading system to give a 'weighted green score' on parameters such as biodegradability, presence of ethical suppliers, energy consumption in harvesting, the labour force involved, etc.

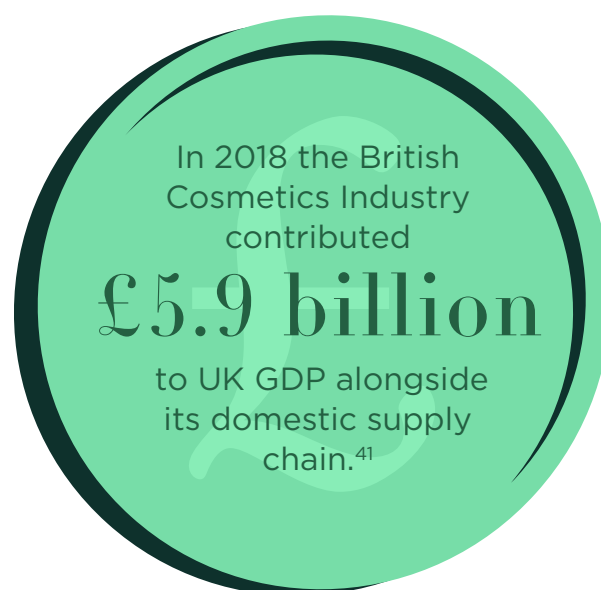
“In a way we never could have predicted, the cycle of consumption has been broken by the pandemic, marking a moment of change in our customers to a more considered mindset and requiring us to set new expectations for retail.”

- Anne Pitcher, Global Managing Director of Selfridges Group⁴²

MORE ACCOUNTABILITY FROM RETAILERS

Selfridges recently launched Project Earth which aims “to radically change the business” promoting sustainability throughout its operations. Such initiatives start to challenge destructive patterns of endless new product launches, confusing marketing and the push for unnecessary consumption.

Retailers have enormous influence over what consumers buy, and by extension, on what products brands create. Cult Beauty is working with Provenance to provide verified information about the products they sell.⁴³ By being transparent, and communicating clearly, it gives consumers confidence in their buying decisions, and connects them with beauty brands that share their values.



WORKING WITH THE WHOLE TEAM TO EFFECT POSITIVE CHANGE

IN THE BOARD ROOM

When Natura bought Avon in 2019, it became the fourth largest global cosmetics business and the one of the world's largest B Corps.⁴⁴ They are blazing a trail. When Avon's Directors voted to sell, they became the first such company to overturn shareholder primacy in favour of corporate governance designed to create sustainable value for all stakeholders.

The businesses practices we have long taken for granted are being profoundly challenged by alternative models that are succeeding not only by their own, sustainability-focused standards, but in terms of revenue and profit.

Investors are recognising this too. **Between 2005 and 2018, investments in sustainability-based strategies grew by 6,417%.⁴⁵**

"Our aspiration is to build not just the best beauty company in the world, but the best beauty company for the world."

Roberto Marques, Executive Chairman of the Board of Directors and Group CEO, Natura&Co

IN THE STAFF ROOM

Over 70% of business leaders recognise that a strong company purpose drives innovation and nurtures employee satisfaction.

It can even increase productivity by around 30%.⁴⁶

An engaged and motivated staff team has an exciting role to play in identifying opportunities for change. Whether this is educating themselves to support customers to make better choices, reviewing procurement processes or undertaking more sustainability-informed new product development.

People find real meaning in their jobs when they can work with others in pursuit of something like a journey towards greater sustainability, which makes a positive difference to people and planet.

"Our staff are our ambassadors. When a consumer speaks to a team member on the shop floor, that's where they're getting their information from." - Teresa Havvas, The Advisory &

88%
of studies found
companies adhering
to social or
environmental standards
perform better.⁴⁷



The background is a dense, multi-colored texture with a rainbow-like gradient from purple and blue on the left to yellow and green on the right. A large, white, stylized graphic element, resembling a thick, curved line or a partial letter, is positioned on the right side of the image, overlapping the colorful texture.

ENVISIONING A BEAUTIFUL INDUSTRY

Photo by Kamila Maciejewska on Unsplash

AIMING HIGH; SETTING INDUSTRY-WIDE STANDARDS

Unlike other sectors, beauty lacks agreed standards to meet in the areas that matter the most. This lack of shared framework for action is a significant hindrance to accelerating positive impact. Other consumer-facing industries, like food and fashion, provide examples of the benefits generated by the opportunity to offer guarantees around ingredients, impact and harm.

Developing and implementing universal standards requires engagement from partners throughout the value chain, from farmers to manufacturers to logistics to retailers. Standards form the basis on which to develop shared understanding about how an industry wants to operate and can drive far-reaching change.

Independently verifiable standards also remove the temptation of brands to self-certify. For example, 1% organic material is all that's needed for a company to claim a beauty product is organic. Standards limit the risk of unsubstantiated claims being made and ensures those brands achieving the high standards gain appropriate recognition. Legislation has a role to play in cementing these efforts.

The result of widely adopted standards is that it lifts up all aspects of the ecosystem.

BEAUTY AND PERSONAL CARE PRODUCT SUSTAINABILITY RATING SYSTEM

An initiative of the Sustainability Consortium to develop a rating system covering Packaging, Disclosure, Human Health, and Supply Chain and the Environment.⁴⁸

COSMOS

19,000 products and ingredients have been certified organic or natural by COSMOS. The standards are led by a coalition of highly experienced European certification bodies.⁴⁹

BOOTS AND THE SPF RATING SYSTEM

Boots originated the 5-star SPF rating for sunscreen protection to provide easy to understand information to consumers. Recognising its value, Boots made the system available to the whole industry, allowing it to be widely adopted.



“We want choosing organic beauty and wellbeing products to be as natural as picking up organic bananas in a supermarket!” - Lauren Bell, Soil Association

SPEAKING A CLEAR AND COMMON LANGUAGE

Clean, green, natural, vegan, cruelty-free, organic, biodegradable; the terms used by brands to tap into the growing desire among consumers for less environmentally toxic and personally damaging products are many and varied. So is what they mean.

Marketing, often driven by unsustainable goals for consumers to just buy more, can cloud the issues. Questionable claims about the sustainability credentials of a brand, or taking advantage of consumers' fears or confusions, can be tempting ways of pushing product off the shelf.

Greenwashing makes it more difficult for consumers to make the choices they want to be able to make. It undermines the credibility of the sector more widely and is a substantial barrier to real progress.

Communication and marketing are often under-used opportunities for brands to connect with consumers to cultivate shared learning and educate about sustainability issues.

Transparency is critical to doing this successfully and is perhaps an aspect of sustainability that requires the greatest courage.

It also brings with it significant reward, not only in terms of sales but trustworthiness, which is the number one consideration for consumers when making decisions about which beauty products to buy.

Engaging consumers with open and honest messages about a brand's sustainability journey has the potential to provide a new way to build a long-term relationship with customers.

NATRUE

Is the first global certification available for beauty products that are natural and organic.⁵⁰

PROVENANCE

A data and tech platform enabling brands to track and communicate accessible, trustworthy information about the origin, supply chain and impact of their products.⁵¹

“I love when I see a brand that simply says what they are doing - don't try and persuade the consumer or tell them how to feel. They should let the consumer decide how they feel about it.”

Arizona Muse

PRESERVING BIODIVERSITY

The success of the campaign to ban microbeads in the UK is evidence of the potential for change to happen on an enormous scale. The legislation eliminated the 680 tons of microbeads that were used in cosmetic products in the UK every year.⁵²

There are numerous examples of individual brands and collaborations undertaking inspiring and impactful initiatives.

Exploring lab-grown, even “nature-identical,” alternatives is a valuable avenue that can help with efforts to preserve rare ingredients and delicate ecosystems, as can agricultural and food industry waste upcycling.

A balance must be struck to ensure that the negative impacts of trying to source original and rare ingredients are not more damaging than synthetic alternatives. The efficiency of palm oil means that efforts to focus on sustainable production remains a less damaging option compared to alternatives such as soybean and coconut.

Ultimately, there are many opportunities for brands to engage with and replenish the forests, farms and fields their raw materials come from, to leave them better than they found them.

LUSH

Since 2014, Lush has been investing in regenerative farms in Uganda, Peru and Guatemala. These are agricultural projects that regenerate degraded land while producing ingredients for their products, and providing a good standard of living for farmers.⁵³

ROUNDTABLE ON SUSTAINABLE PALM OIL

With 4,000 members from across the palm oil industry, the RSPO has a mission to make sustainable palm oil the default. It engages with producers, processors, retailers and finances to set and certify standards and drive continuous improvements in practice.⁵⁴

WELEDA & THE UNION FOR ETHICAL BIOTRADE

The Union for Ethical BioTrade began as a UN initiative to ensure the protection of ecosystems and ethical sourcing of natural ingredients. Weleda is one of the first brands to achieve the UETB Sourcing with Respect certification for all of its products.⁵⁵



OPTIMISING WATER USE

One of the most important and least tackled issues in the beauty industry is water usage.

Cleaning waste water after industrial processing before releasing it into waterbodies can help remove synthetic materials and silicone which cause damage to marine life. Substituting less damaging alternative product ingredients for known offenders can be another way to address this issue. The fragrance house, Firmenich, is using new biotechnology to create biodegradable synthetic fragrance molecules that won't pollute water.⁵⁶

L'Oreal recently announced that by 2030 its water usage in industrial processes would be 100% recycled and reused in a completely closed loop system.³⁴

Almost three-quarters of people routinely turn off the tap while brushing their teeth.¹¹ This is the result of a campaign focused on educating people on the benefits of doing so. Encouraging behaviour change among consumers, through communication campaigns, and product design, is a powerful way to address water wastage.

AVEDA & WATERAID

Discovering we can save 6 gallons of water by cutting 3 minutes from our shower time, the Aveda campaign with WaterAid encourages us to go an extra day without washing our hair.⁵⁷

OWA

OWA is an entirely water-free cosmetics brand. They use this commitment as an opportunity to innovate, and have recently launched a powder shampoo.⁵⁸

ETHIQUE

Ethique has developed a water-free conditioner bar, which is the equivalent of 5 bottles of liquid conditioner.⁵⁹

BBC EARTH X BOOTS

BBC Earth range of bathroom gifts developed by Boots. Formulated products are bar-based and the range has zero single-use plastics. The range is also certified CarbonNeutral(R), is Leaping Bunny, vegan and formulated to Clean Beauty principles.⁶⁰



CONSUMING BEAUTY RESPONSIBLY

USE LESS

The average woman in the UK uses just 12 products in her beauty regime.⁶¹ Yet spending on cosmetics is creeping up. This suggests there are more opportunities to explore what brand leadership looks like in this space. The moment has arrived for the beauty industry to rise to the challenge of developing more sophisticated business models than simply encouraging consumers to buy more stuff.

REUSE MORE

Exploring ways to close the many open loops in the beauty industry is a powerful way to reduce the amount of raw materials consumed and waste produced – whether through refillable or returnable packaging, waterless products, or development of new materials.

Brands, like Liz Earle, are experimenting with cross-industry relationships. Their Superskin range uses cranberry seeds left over from juice production, which are otherwise wasted.⁶³

Increasingly, beauty brands are understanding the need to design products with the afterlife of a product designed in from the start.

Lush created the Naked line of products with the whole lifecycle in mind, which drove decision-making on everything from ingredients to packaging. Innovating with this in mind has generated other benefits, such as reduced water use and savings that can be spent on higher quality ingredients.

LOOP BY TERRACYCLE

This service enables consumers to buy familiar products in zero-waste packaging that is cleaned and refilled to be reused.⁶⁴

REN

Ren has committed to be zero waste by 2021. They partner with Surfers Against Sewage and Plastic Patrol to create packaging that is made from recycled materials and is 100% recyclable packaging.⁶⁵

“When you buy something, you pay for the labour, the materials, the effort and energy & water that’s gone into making it, but you don’t pay for what happens to it after.”

Richard Kirkman, Chief Tech and Innovation Officer, Veolia⁶²



An underwater photograph showing a fishing net with a fish inside. The water is clear and blue, with sunlight filtering through from above. A large white number '6' is overlaid on the right side of the image.

RECOMMENDATIONS

COLLABORATION ACROSS THE INDUSTRY

The industry needs to come together around a shared vision, a commitment to deliver change at the pace, scale and scope necessary, with an appreciation and enthusiasm for working together to achieve it.

In short, we need a Sustainable Beauty Coalition, spearheaded by the British Beauty Council, to address the climate and ecological crisis. It should be representative of all elements of the industry in the country. It should be based on some fundamental ambitions and ways of working together:

COURAGE

The industry needs to be courageous and commit to making the changes necessary to address the climate and ecological crisis.

COMPROMISE

Part of being courageous is recognising this will require the industry to make trade-offs to ensure its longterm sustainability. We will have to address over-consumption and be creative in how we balance this with the sustainability of our businesses.

CLARITY

We need to build on work done by the Cosmetic, Toiletry and Perfumery Association and others in establishing shared definitions and terminology that we use consistently.

CLAIMS

We need to be more rigorous in the claims we make, ensuring they are meaningful and consistent across businesses. Consumers should be able to check them with reference to industry-wide certifications.

COMMUNICATION

We need better and more streamlined communication to engage and activate consumers and help them make better choices.

CAPITAL

We can't do it alone. We need government support and funding for manufacturing to transition effectively.

“Never before have we had such an awareness of what we are doing to the planet, and never before have we had the power to do something about that... The future of humanity and indeed, all life on earth, now depends **ON US.**” - Sir David Attenborough

THE WORK OF THE SUSTAINABLE BEAUTY COALITION

1. Create a Framework for Action

Acknowledging that much work has already been done, and building on it, the Coalition will co-create the overarching framework for action for the industry.

The framework will focus on the key themes of climate, biodiversity, waste and water. It should set ambitious SMART targets for the industry to work towards.

Delivering on this framework requires industry-wide commitment to joint initiatives in:

- **Transparency and accountability:** being clear with consumers and others about what sustainability means and progress achieved.
- **Standards and certification:** establishing industry-wide standards that meet the scale of the challenge and ensuring only meaningful certifications are used.
- **Education and awareness building:** to engage and activate consumers so they are part of the call for better.
- **Innovation and tech:** harnessing the industry's excellence in innovation for good and exploring the role technology can play in delivering the ambitions of the framework.

2. Commission a Report that explores how businesses can meet sustainability ambitions and build long-term success.

3. Undertake a Collective Communications Campaign to assist all consumers in making better choices and roll them out nationwide.

4. Coordinate a Fundraising Commitment to develop a fund to support the implementation of the work arising from the framework and the communications campaign.

5. Develop an Ambassadors Programme, from the shop floor to David Attenborough, to empower everyone associated with the industry to actively participate in bringing about change.

ACTIONS FOR BEAUTY BUSINESSES

1. Join the Sustainable Beauty Coalition

For a coalition to work it needs businesses to get on board and to commit to shared success for the industry.

2. Review Business Models

Companies need to reassess their business models so they are more sustainable. The scientific evidence of a climate and environmental crisis is clear and the COVID-19 pandemic has heightened attention on the need for resilience and living well.

Like L’Oreal, companies should commit to running their businesses within planetary boundaries. They should commit to the operational changes necessary in the areas of climate, water, natural resources and waste.

3. Be Clearer with Consumers

Some beauty industry communications serve to confuse consumers. The future lies in recognising that engaging and activating consumers with transparent communications builds the trust vital for long-term success. Using only national or internationally agreed

certifications is a prerequisite. In the Hubbub survey²⁰, 90% want clearer information on how to recycle products when finished; 88% want information on how to use products in a more environmentally friendly way and 86% want information about ingredient supply chains.

4. Meet Consumers Where They Are

Driving change requires that companies meet consumers where they are. In figures from the Hubbub survey²⁰, 91% want less packaging and 88% want to be able to refill their cosmetics. Companies should meet this need head on, reducing packaging and offering refills. It shows intent to work with consumers in this common cause and creates a platform for more change in the future.

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86%
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about ingredient
supply chains.

91%
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packaging.



88%
want to be able
to refill their
cosmetics.

ACTIONS FOR CONSUMERS

1. Reduce, Reuse, Recycle

The old mantra still holds true. The Hubbub survey¹⁰ showed that more than 61% of people have used or partly used products they no longer want.

- Use what you have or give it to a friend if you don't want it.
- Buy products with less packaging or recycled packaging.
- Buy products in refillable containers and refill them in store or return them for refill from your doorstep via the LOOP system.
- Recycle your bathroom waste.

2. Choose Genuine, Sustainable Products

You can help create positive change by checking the sustainability credentials of the products you buy and choosing fewer, more sustainable products.

Look for national or international independent certifications like Natrue, EWG verified, Rainforest Alliance, Roundtable on Sustainable Palm Oil, Leaping Bunny, Soil Association certified organic and B Corp.

3. Use Wisely

By thinking about how you use water, you can reduce the overall impact of a cosmetic product. Individuals are already taking a number of actions to be more considerate of the environment in the use of their beauty and grooming products. For example 70% of those surveyed reported that they currently turn the tap off when brushing their teeth/ washing their face. Already, 70% of consumers are turning off the tap when washing their face and 57% are taking shorter showers.

4. Speak Up

Brands are listening to consumers – you can get in touch through their consumer contact pages or social media.

Ask them about their approach to sustainability, what they are doing about plastics, recycling, water waste, biodiversity – whatever matters most to you. Letting brands know what you expect from them in terms of sustainability will motivate them to elevate what they are doing.



“The climate crisis has already been solved. We already have all the facts and solutions. All we have to do is to wake up and change.”

- Greta Thunberg

APPENDICES



DEFINITIONS

CLIMATE CHANGE

The rising average temperature of Earth’s climate system, called global warming, is driving changes in rainfall patterns, extreme weather, arrival of seasons, and more. Collectively global warming and its effects are known as climate change.

CIRCULAR ECONOMY

In contrast with other economic models based around “take, make dispose”, circular economy is a system aimed at eliminating waste and the continual use of resources. Circular systems employ reuse, sharing, repair, refurbishment, remanufacturing and recycling to create a closed-loop system, minimising the use of resource inputs and the creation of waste, pollution and carbon emissions.

THE DOUGHNUT, PLANETARY BOUNDARIES & SOCIAL FOUNDATIONS

The planetary boundaries are the “safe operating space for humanity” for the international community, including governments at all levels, international organisations, civil society, the scientific community and the private sector, as a precondition for sustainable development. They were developed by the Stockholm Resilience Centre. <https://www.stockholmresilience.org/>

The social foundations are the minimum standards that are required to support a reasonable quality of life for all individuals.

Kate Raworth brought these two concepts together to form the “doughnut” economic model - this is the idea that we need to be operating in the sweet spot that respects planetary boundaries and social foundations.

INTERSECTIONAL ENVIRONMENTALISM

This is an inclusive version of environmentalism that advocates for both the protection of people and the planet. It identifies the ways in which injustices happening to marginalised communities and the earth are interconnected. It brings injustices done to the most vulnerable communities, and the earth, to the forefront and does not minimize or silence social inequality. Intersectional environmentalism advocates for justice for people + the planet. ~ Leah Thomas <https://www.intersectionalenvironmentalist.com/>

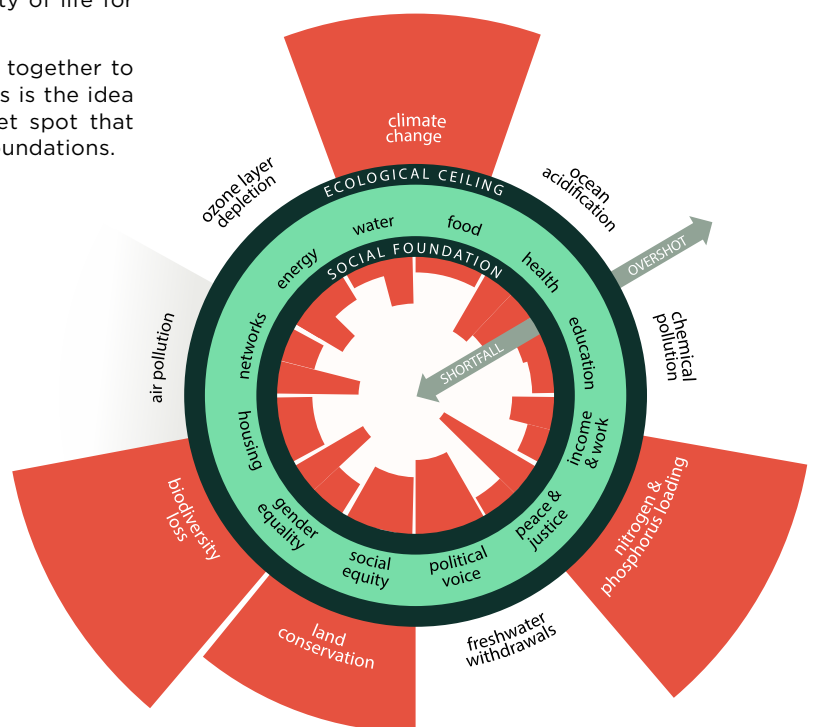
SCIENCE-BASED TARGETS

Science-Based Targets are a means for establishing what a company needs to do to reduce its environmental impact which uses models that calculate, for example, the level of carbon reduction a particular organisation needs to achieve in order to do its ‘fair share’ in reducing global emissions. <https://sciencebasedtargets.org/>

SUSTAINABLE DEVELOPMENT GOALS (SDGs)

The SDGs are a collection of 17 global goals designed to be a “blueprint to achieve a better and more sustainable future for all”. The SDGs, set in 2015 by the United Nations General Assembly and intended to be achieved by the year 2030. <https://sdgs.un.org/goals>

■ Beyond the boundary
 ■ Boundary not quantified



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GLOSSARY OF MARKS

B CORP

bcorporation.uk/certification

Certified B Corps are businesses that balances purpose and profit. They are legally required to consider the impact of their decisions on their workers, customers, suppliers, community, and the environment.



countries. They incorporate a holistic blend of social, economic and environmental criteria. They are intended to ensure fairer terms of trade between farmers and buyers, protect workers' rights.

BEAUTY WITHOUT BUNNIES (PETA)

peta.org/about-peta/learn-about-peta/info-businesses/beauty-without-bunnies-program/

Certified by PETA as either "Animal Test-Free" or "Animal Test-Free and Vegan." companies and brands must prove that they and their suppliers do not conduct, commission, pay for, or allow any tests on animals for their ingredients, formulations, or finished products anywhere in the world and that they will never do so in the future. To gain the additional Vegan element, they must demonstrate that their entire product line is free of animal-derived ingredients.



LEAPING BUNNY (CFI)

leapingbunny.org



Created by the Coalition for Consumer Information on Cosmetics (CCIC) formed by eight national animal protection groups. The CCIC promotes a single comprehensive standard for non-animal testing, cruelty-free products.

CERTIFIED VEGAN (VEGAN ACTION)

vegan.org/certification/

Certified by Vegan Action as products that do not contain animal products or byproducts and that have not been tested on animals.



NATRUE

natrue.org



A certification for natural and organic. It covers natural, derived natural and nature-identical substances NATRUE's products can be certified as natural, natural with organic portion (at least 70% of the natural substances or derived natural substances are organic) or organic (at least 95% of the natural substances or derived natural substances are organic).

COSMOS

cosmos-standard.org

The COSMOS standard can be applied to products and raw ingredients and is an indicator that they are either organic and/or natural cosmetics.



RAINFOREST ALLIANCE

rainforest-alliance.org



The Rainforest Alliance certification seal means that the product (or a specified ingredient) was produced by farmers, foresters, and/or companies working together to create a world where people and nature thrive in harmony.

CRADLE TO CRADLE

c2ccertified.org/get-certified/product-certification

Cradle to cradle certified products are assessed for environmental and social performance across five critical sustainability categories: material health, material reuse, renewable energy and carbon management, water stewardship, and social fairness.



ROUNDTABLE ON SUSTAINABLE PALM OIL CERTIFIED

rspo.org/certification



This standard is awarded to companies who can evidence that they respect and consider local people, guarantee that no 'high conservation value' (HCV) areas are cleared, and minimise environmental impacts of production.

FAIRTRADE

fairtrade.net/about/what-is-fairtrade

Fairtrade Standards are designed to support the sustainable development of small producer organisations and agricultural workers in developing

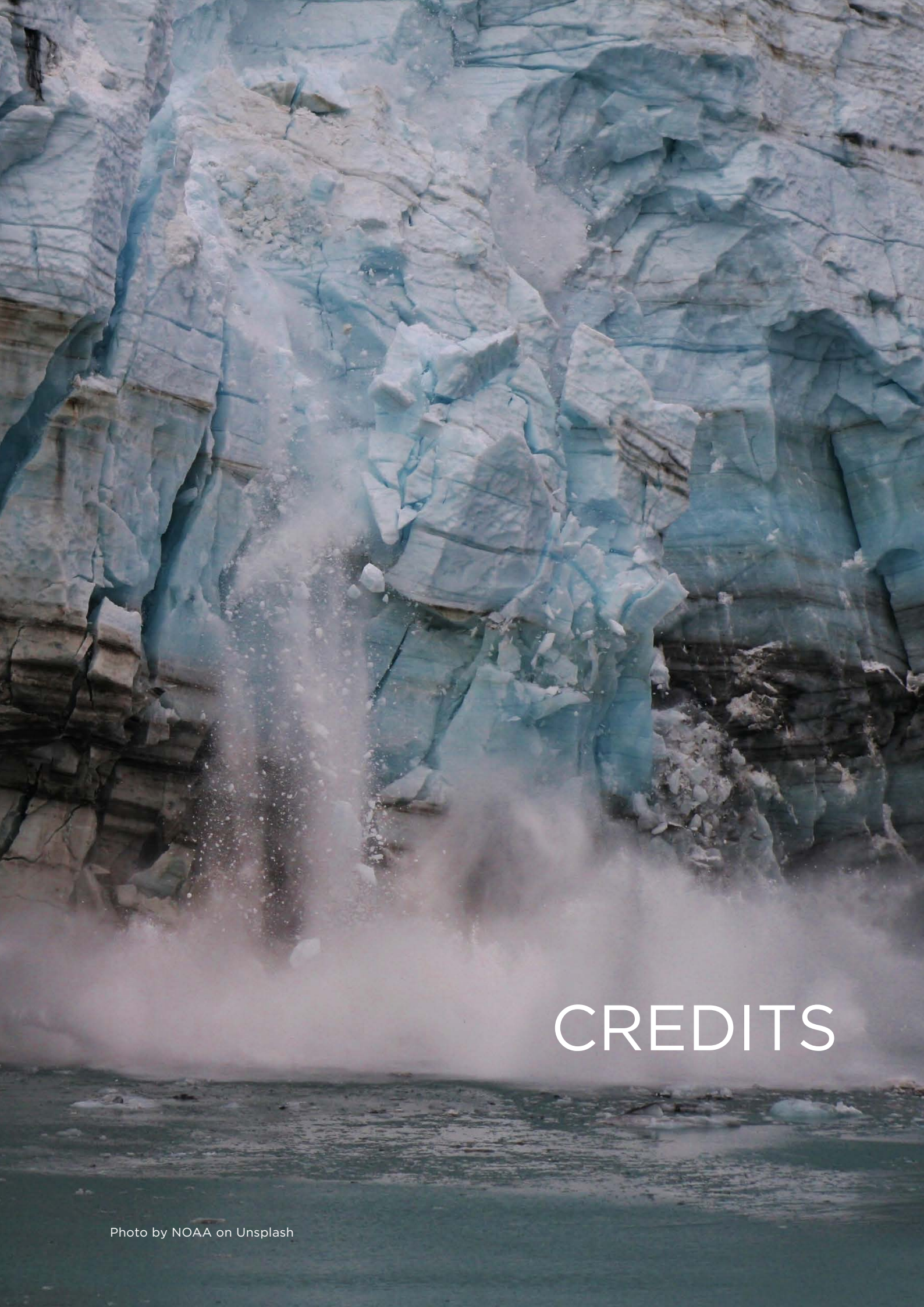


VEGAN (VEGAN SOCIETY)

vegansociety.com/take-action/ask-vegan-trademark

The founders of the Vegan Society coined the term "vegan." Their certification requires companies to ensure that products are free from animal ingredients and animal testing at the initiative of the company.





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