



# 2025

## A global sustainability inflection point

November 2024





Pressure is on business to be  
**FUTURE-FIT**  
in an era of polycrisis.



# But the global sustainability context is challenging

## Activism

Shareholder and civic activism accelerates adoption in some regions and sectors, but progress is uneven

## Confusion

Lack of shared language and standardized disclosure causes confusion and criticism

## Performance

Governments and companies have made bold environmental commitments, and most are off track

## Backlash

Rising scrutiny on green claims and politicization of climate issues lead to an increase in greenwashing criticism and litigation



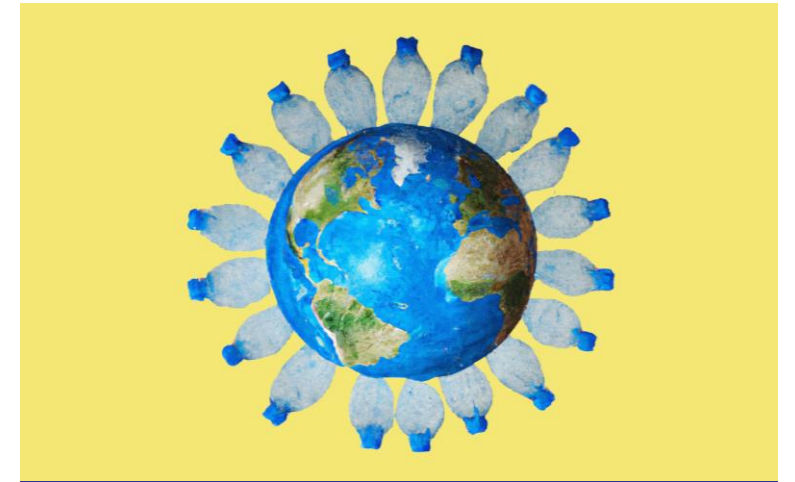
# 2025 will be a defining year for the next chapter of sustainability



**1** Parties to the Paris Agreement must update national commitments

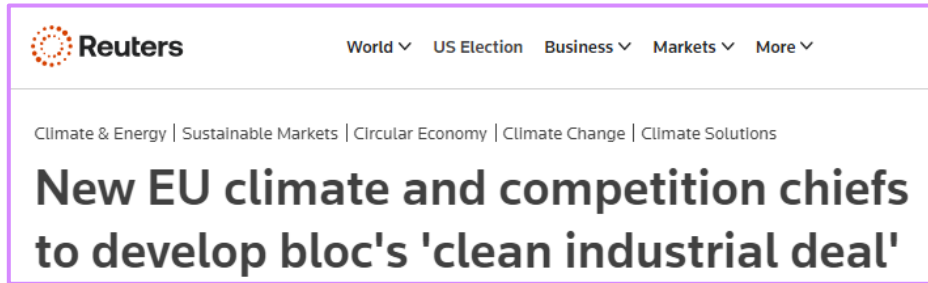


**2** The UN will conduct a mid-decade review of global progress



**3** A global plastics treaty is on track to be finalized in 2025

# With new leaders in the U.S. and E.U., sustainable competitiveness will be a new geopolitical football



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## New EU climate and competition chiefs to develop bloc's 'clean industrial deal'



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## Companies Urge EU to Stick to Green Deal Commitments



The New York Times

Updates President Senate Track the House How Voters Shifted Trump's Agenda

NEWS ANALYSIS

## *U.S. Election Sends Alarming Message for Global Climate Efforts*

The Trump victory sets back the world's attempt to rein in dangerous levels of warming and potentially isolates the United States in the global energy transition.



# And corporations will be in the spotlight

Many companies set 2030 targets and launched initiatives at the beginning of the decade and stakeholders will be looking to see how they are tracking (or not) against goals.

Companies are on the hook to comply with more regulations in the EU, but relaxing regulations in the U.S. contributing to complexity for multinationals.

## In 2025 ...

**EU reporting mandate – CSRD – goes into effect**

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**EU deforestation act will be in full effect**

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Other areas of regulation on the rise:

**Plastics**

**Biodiversity**

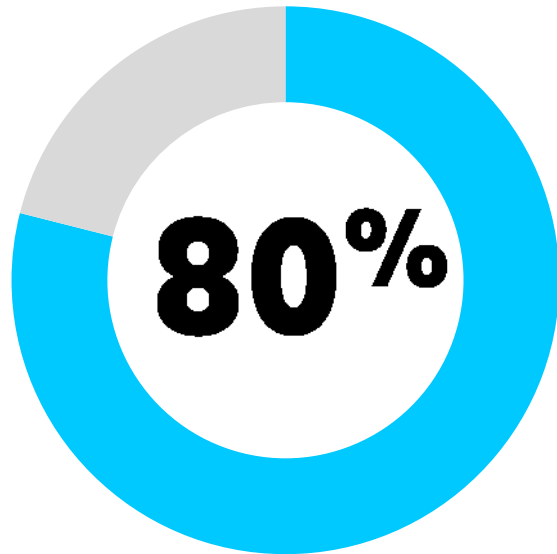
**Circularity**

**Energy**

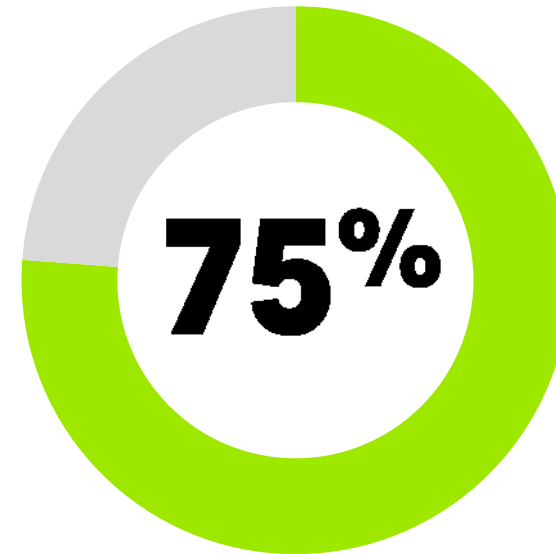
**Pollutants**



# Stakeholders – especially consumers – expect businesses to lead on sustainability issues



**of Global consumers say they are willing to pay on average 9.7% more for sustainable produced or sourced goods.**



**of Gen Z consumers say sustainability is more important than brand name when making purchase decisions**

# Consumer demand is on the rise in all regions

That means that companies at every stage of the value chain have a role to play to tell an end-to-end sustainability story to consumers about the brands, products and services they rely on.

**~75%**

of European consumers **expect companies to invest in sustainability and think governments should impose stricter environmental rules on business.**

**25-40%**

of Asian consumers **expect brand owners to take a primary role in helping them shop for sustainable products.**





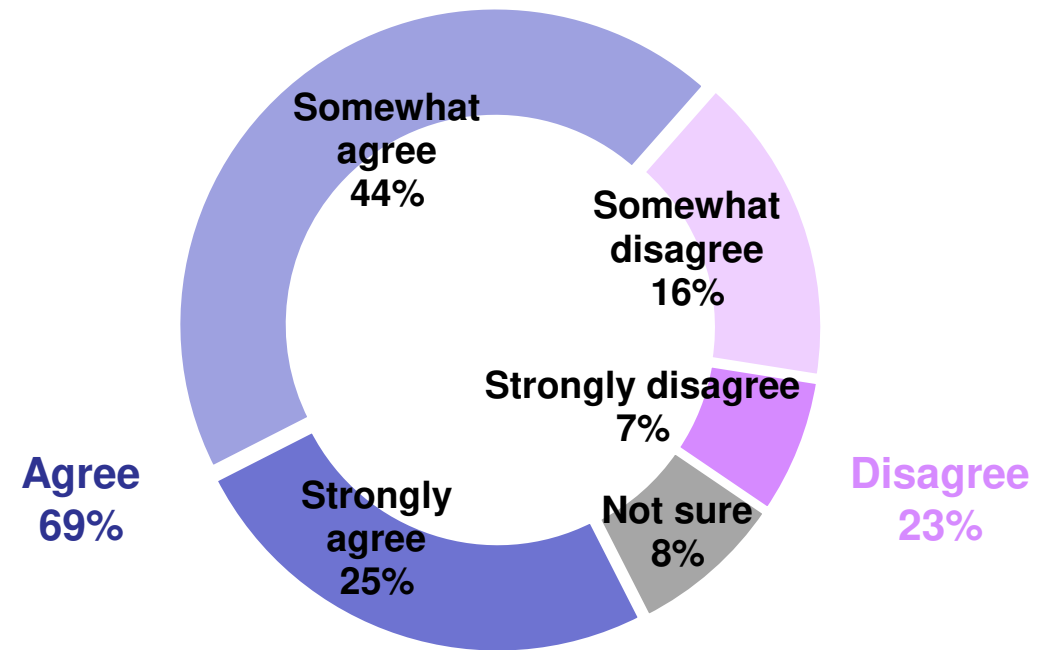
# U.S. consumers expect businesses to step up, too

~70% of Americans see businesses as a constructive force for positive change.

In fact, Americans have more confidence that businesses and employers are playing a positive role in addressing societal issues than the federal government.

This view crosses generations and political affiliations.

**Agree/disagree: Businesses are a constructive force for positive change.**  
*(Among U.S. adults)*

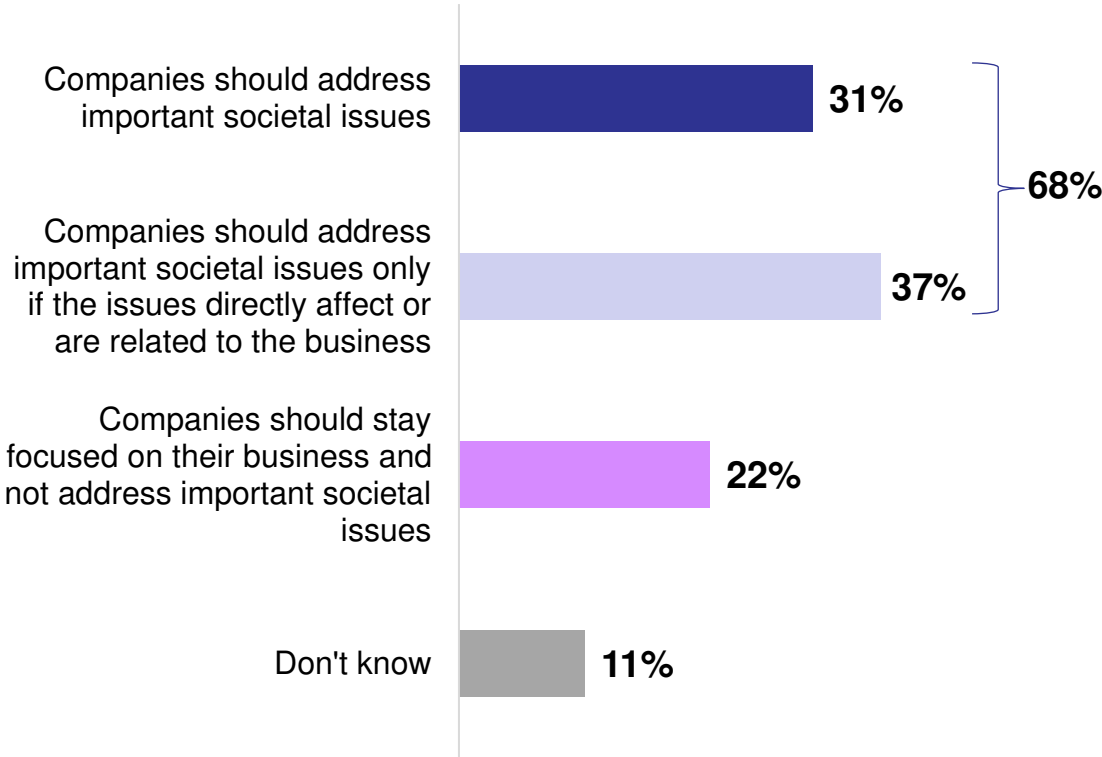


Most think companies should address societal issues – including climate change – especially if they affect or relate to the business

53% of American consumers believe companies have a responsibility to speak up about important societal issues, even if sensitive.

When companies do not sufficiently demonstrate their values, consumers (and employees) respond sharply.

Which is closer to your own opinion about companies you purchase from?  
*(Among U.S. adults)*



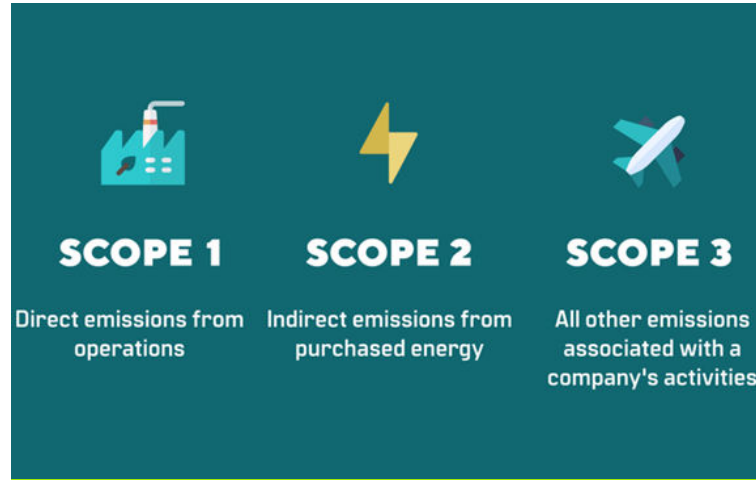


The work of sustainability is  
**GETTING HARDER**  
as it becomes table stakes.

# First mover sustainability leaders no longer enjoy a competitive advantage



**Disclosure mandates take up focus and capacity**



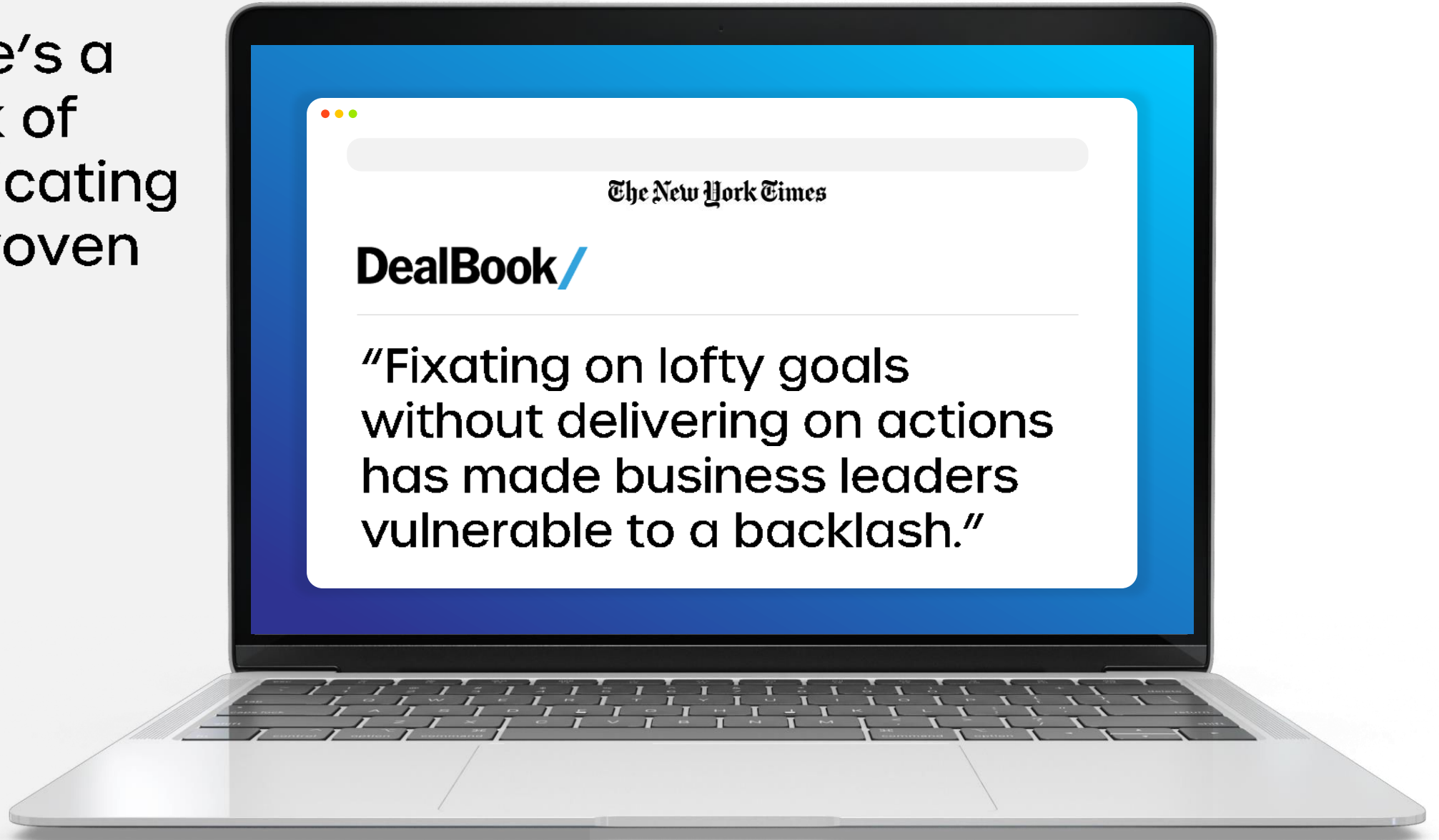
**Scope 3 emissions targets prove difficult to manage**



**SBTi controversy over offsets fuels further greenwashing threats**



And there's a rising risk of communicating before proven impact





Credible leadership requires  
identifying and delivering on  
**TRANSFORMATION**  
opportunities ahead of  
disruption.

Sustainability is now business 101, but will evolve to meet the pressures of 2025 – and beyond



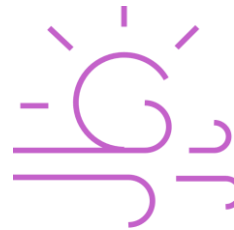
# BOTTOMLINE

Sustainability is an imperative



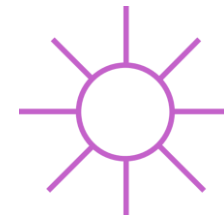
## Ongoing disruptions

Complex, convergent issues will continue to disrupt the economy and geopolitical context and it forces business model transformation



## Opportunities for innovation

Sustainability strategies are critical to anticipating and mitigating the impact of disruptions and identifying opportunities for innovation

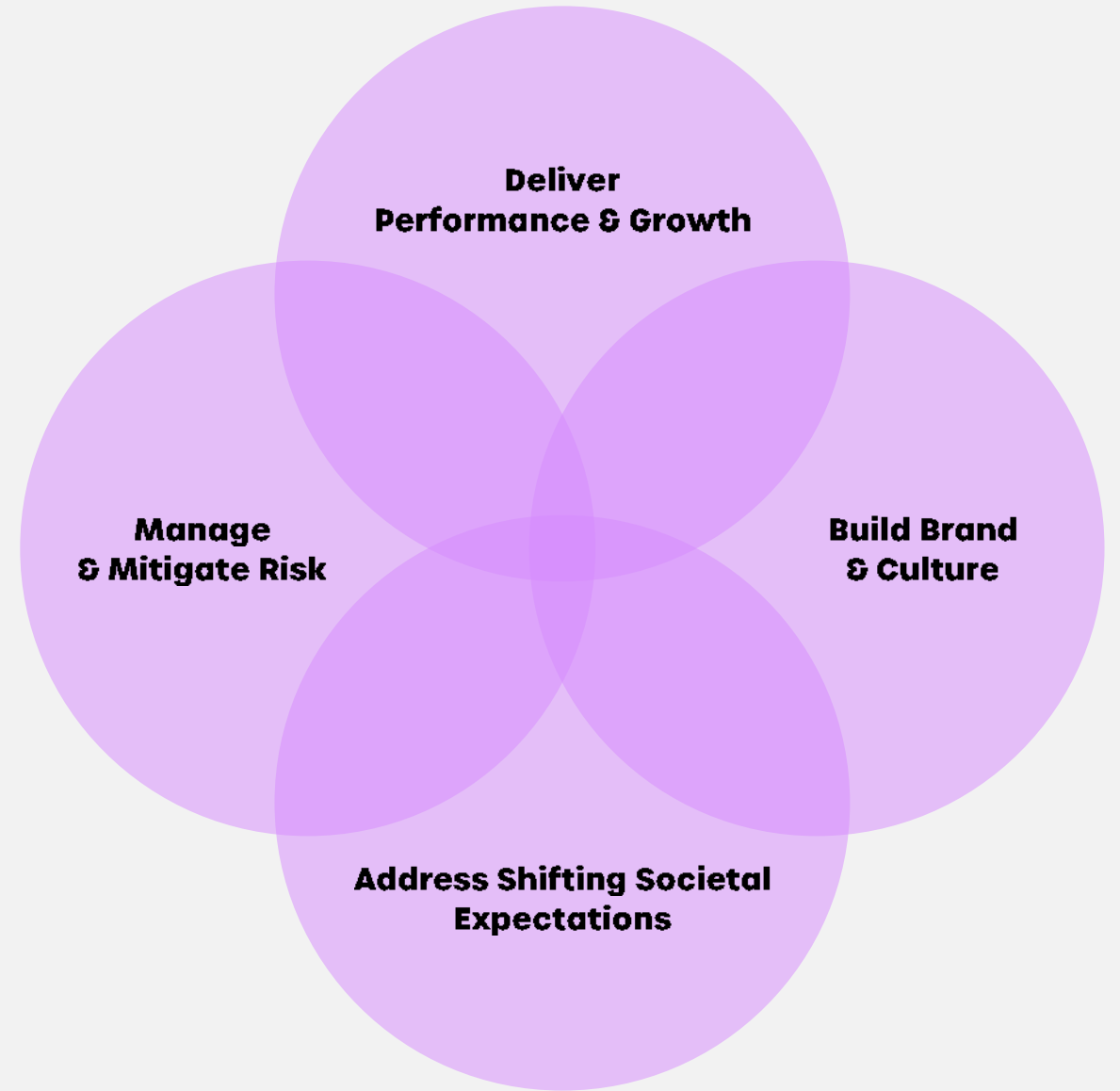


## Sustainable growth

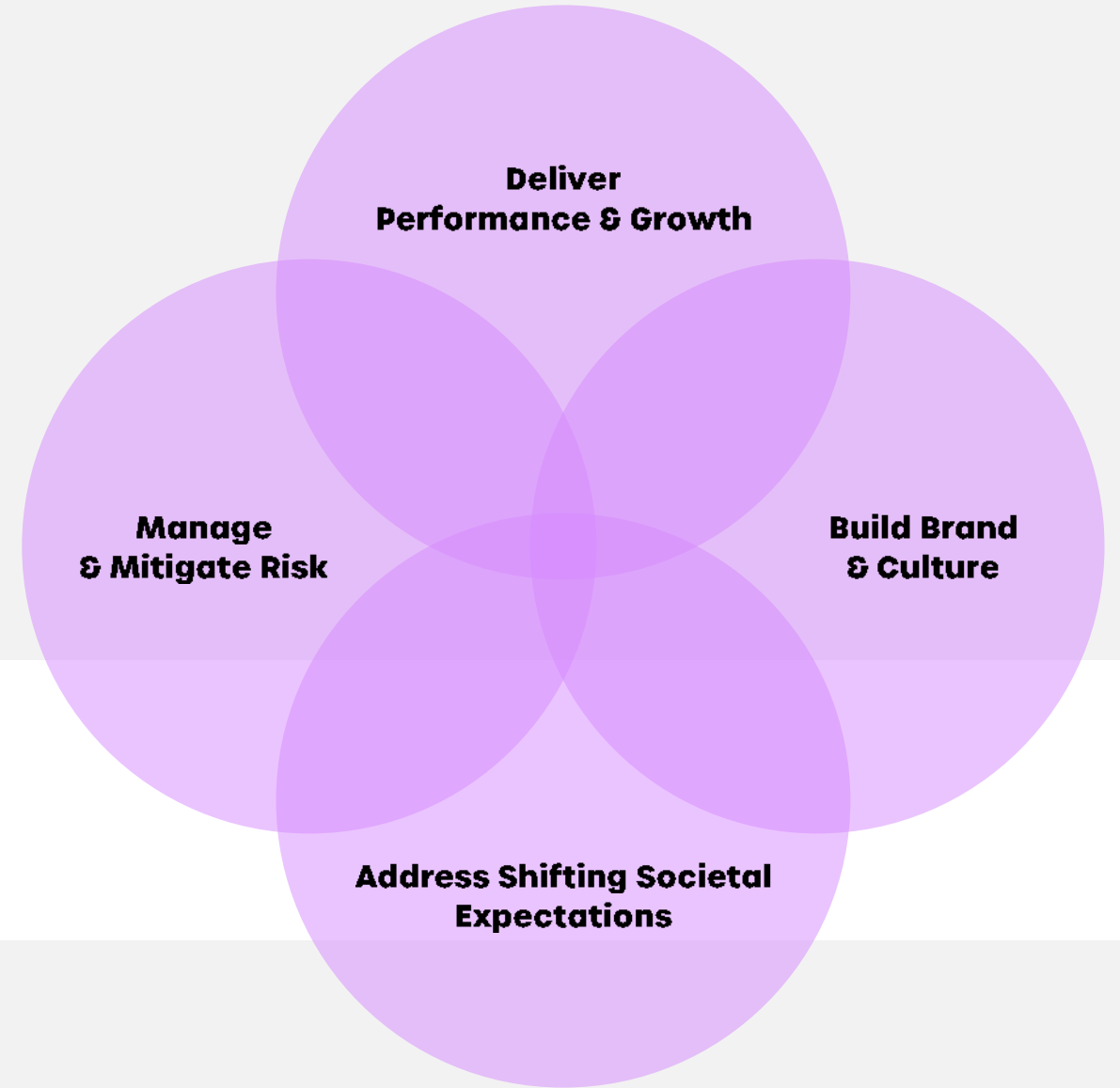
Long-term value creation depends on sustainable solutions to resource constraints, growing inequities and climate calamity



Standing out in this new context requires proving how the organization is solving collective sustainability challenges in an ownable way



- **Define** proactive leadership opportunities
- **Respond** to complex and convergent pressures
- **Build** cross-functional sustainability fluencies
- **Know** when and how to speak up and engage



**PROVE**

**How the business is advancing**  
contributions to collective solutions for  
challenges shared across the value chain

# SUSTAINABILITY FLUENCY

To lead today, business must shift sustainability from a specialized function to a cross-company fluency and mindset, increasing the organization's focus on the right strategic priorities and ability to move with agility, credibility, and resilience to deliver stakeholder value and advance sustainable solutions.



# What it takes to build Sustainability Fluency

## Stakeholder Intelligence

Insights into stakeholder expectations, adversary criticisms and conversation trends to overlay on top of the materiality assessment to inform sustainability positioning and engagement strategies

## Internal Integration

Internal alignment of sustainability goals with essential leadership functions (e.g., comms, marketing, strategy) to infuse a sustainability mindset across the value chain to advance collective priorities

## Resilient Influence

A clear set of engagement priorities vetted against opportunities to lead, risks and flash points backed by agile comms planning and red teaming to ensure credibility and relevance

## Impact Storytelling

Platforms and narratives designed to connect, engage and inspire stakeholder trust and loyalty and share stories of progress against ambitions and transparency about goals and strategic pivots.





A photograph of a modern building with a green wall. The building's facade is composed of horizontal, metallic-looking slats. Lush green plants, including ferns and other foliage, are growing in the recessed areas between the slats, creating a vibrant, living wall effect. The building is set against a clear blue sky. A large, bold, black text overlay is centered on the image, reading "Thank you!".

# Thank you!

**KATE OLSEN**  
EVP & North America Lead  
Social Impact & Sustainability  
Weber Shandwick



Confidential