

Sustainability Leaders 2025

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ERM
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Introduction

The GlobeScan / ERM Sustainability Institute Leaders Survey highlights the most urgent priorities in the current global sustainable development agenda. This year's survey was conducted between August and October 2025 and reflects inputs from almost 400 sustainability experts across nearly 60 countries. In addition to monitoring priority issues over time and tracking notable shifts in their perceived importance, the 2025 survey also examines private sector and civil society sustainability leadership.

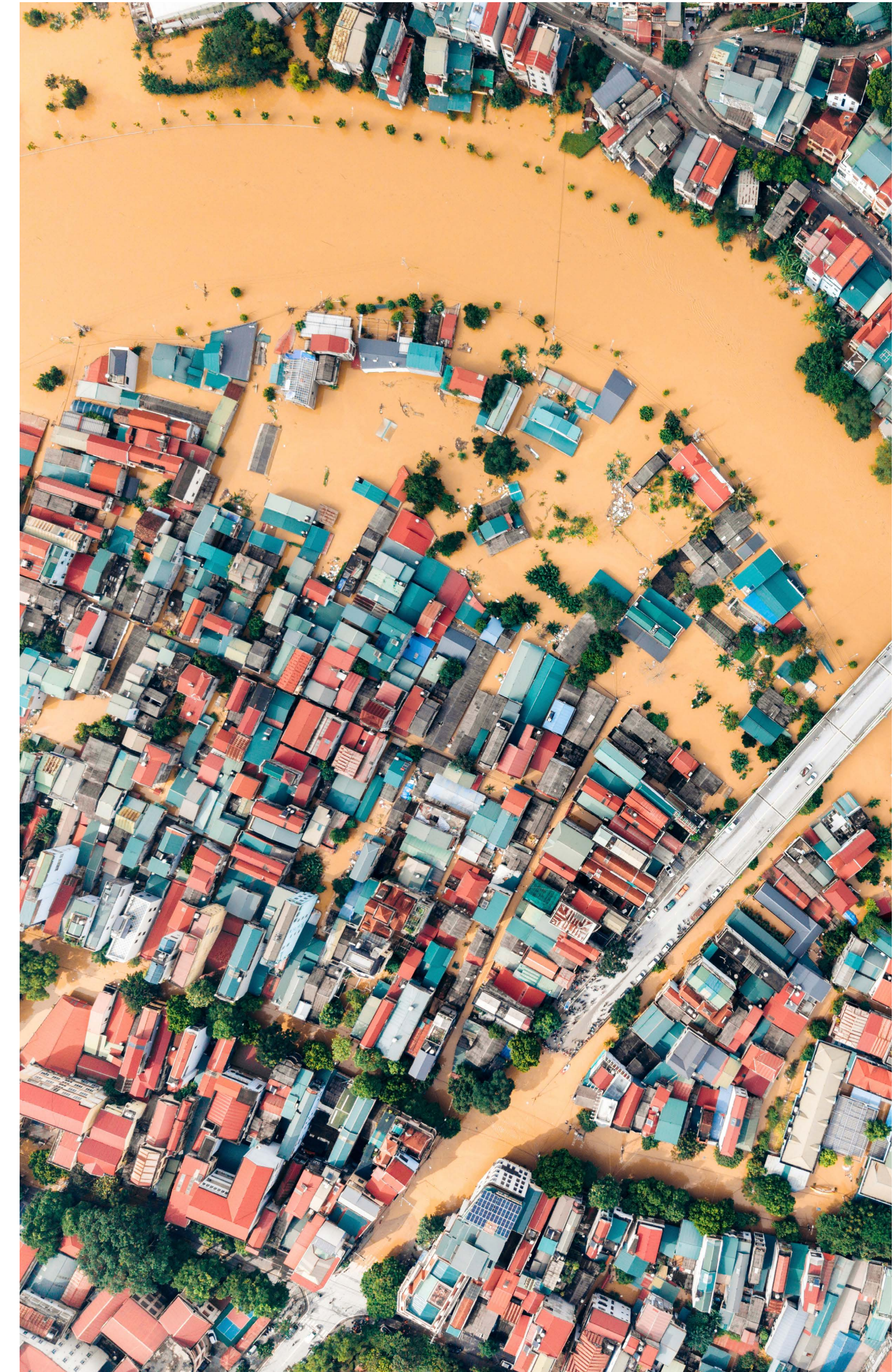
This year, climate change remains the top concern. At the same time, the perceived urgency of many other sustainability issues has declined, including diversity and inclusion, biodiversity, deforestation, water scarcity, and labor conditions in supply chains.

Legislation continues to be seen as the most impactful driver of sustainability development progress over the past 12 months, yet its perceived importance has weakened since 2024. Topics where sustainability leaders place greater emphasis this year compared to 2024 include renewable energy / low-carbon developments, biodiversity initiatives, and global / multistakeholder collaboration. Additionally, there are notable regional differences in terms of which sustainability developments are rated as most important, for example:

- Africa / Middle East, Latin America / Caribbean, and Europe emphasizing legislative frameworks;
- North America highlighting the importance of renewable energy and low-carbon development;
- Asia-Pacific underscoring the key role of climate and nature-based solutions.

In terms of which civil society organizations are viewed as leaders in advancing the sustainable development agenda, WWF remains the most recognized NGO, followed by Greenpeace, The Nature Conservancy, and WRI. Among private sector organizations, Patagonia is the most recognized for the degree to which it has integrated sustainability into its business, with IKEA, Unilever, and Natura &Co following.

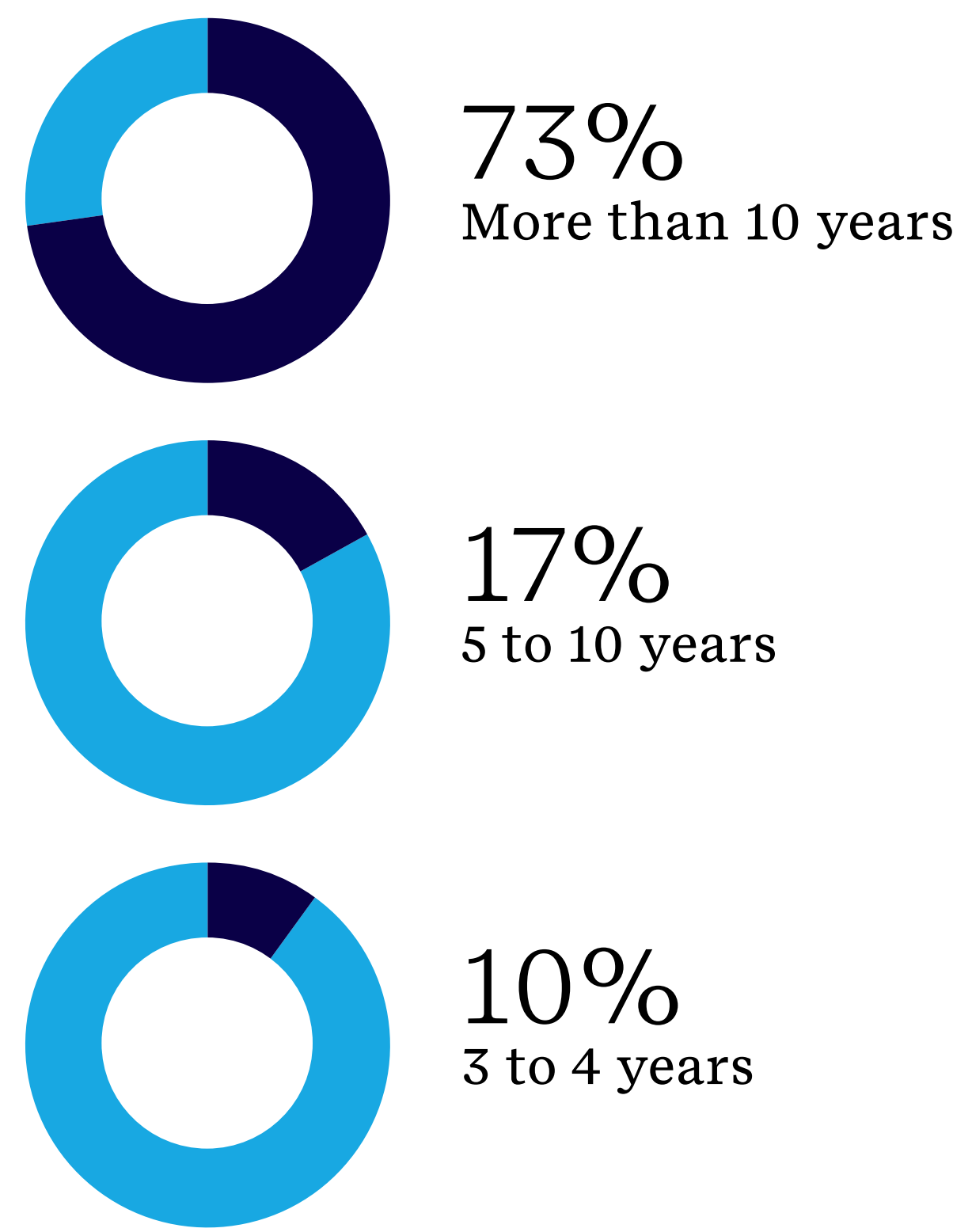
The 2025 Leaders Survey results set a clear mandate for organizations to act decisively. Leadership organizations in all sectors are encouraged to focus on sustainability issues that deliver measurable impact and financial value, secure clean and reliable energy, and meet rising regulatory and stakeholder expectations, even as budgets tighten. Success will depend on factors like falling costs for renewable and low-carbon technologies, accelerating operational and value chain decarbonization, and embracing digital solutions.



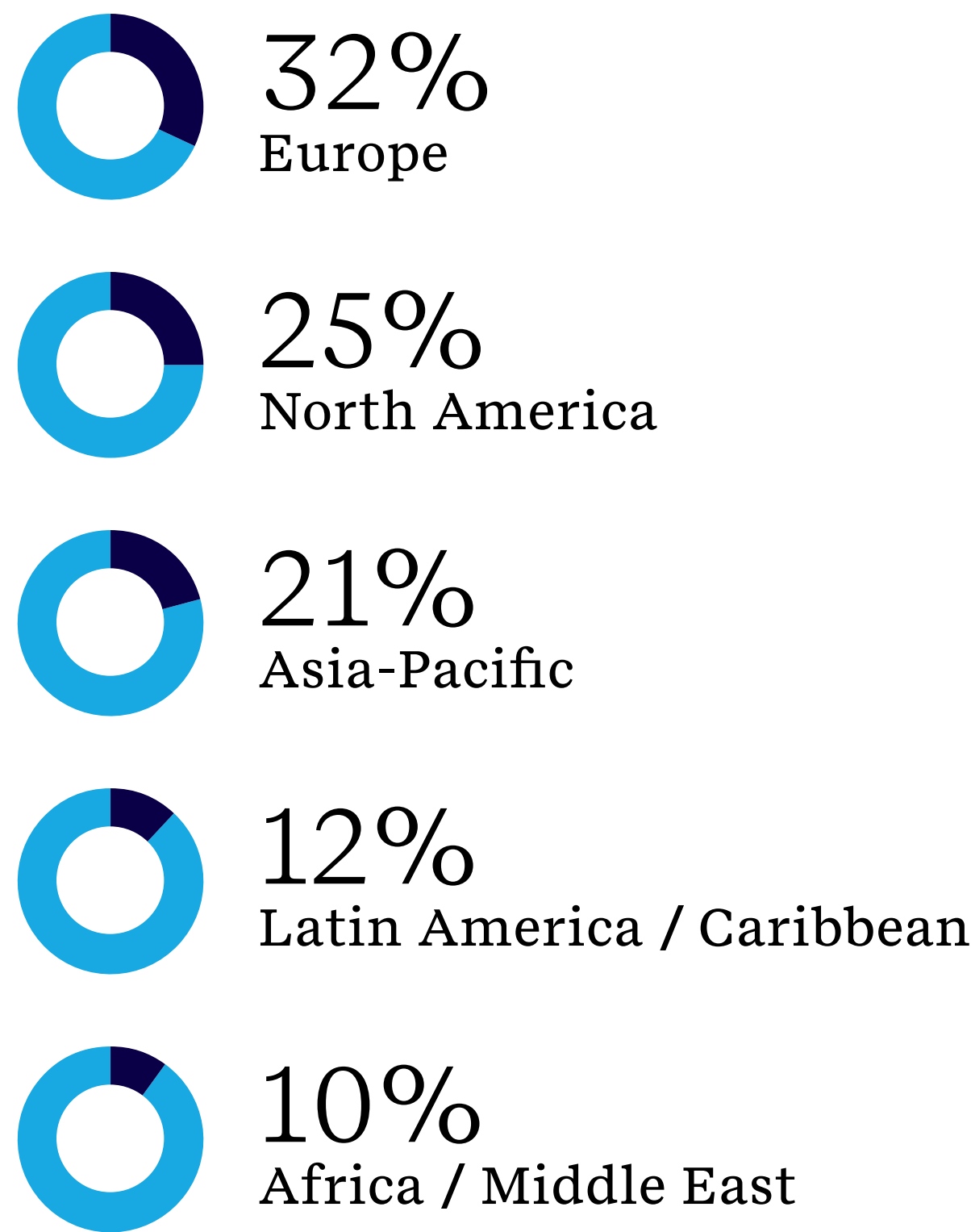
Survey Methodology

A total of 391 qualified, highly experienced sustainability experts across 57 countries completed the survey from August 26th to October 21st, 2025. The questionnaire was offered online to respondents in English.

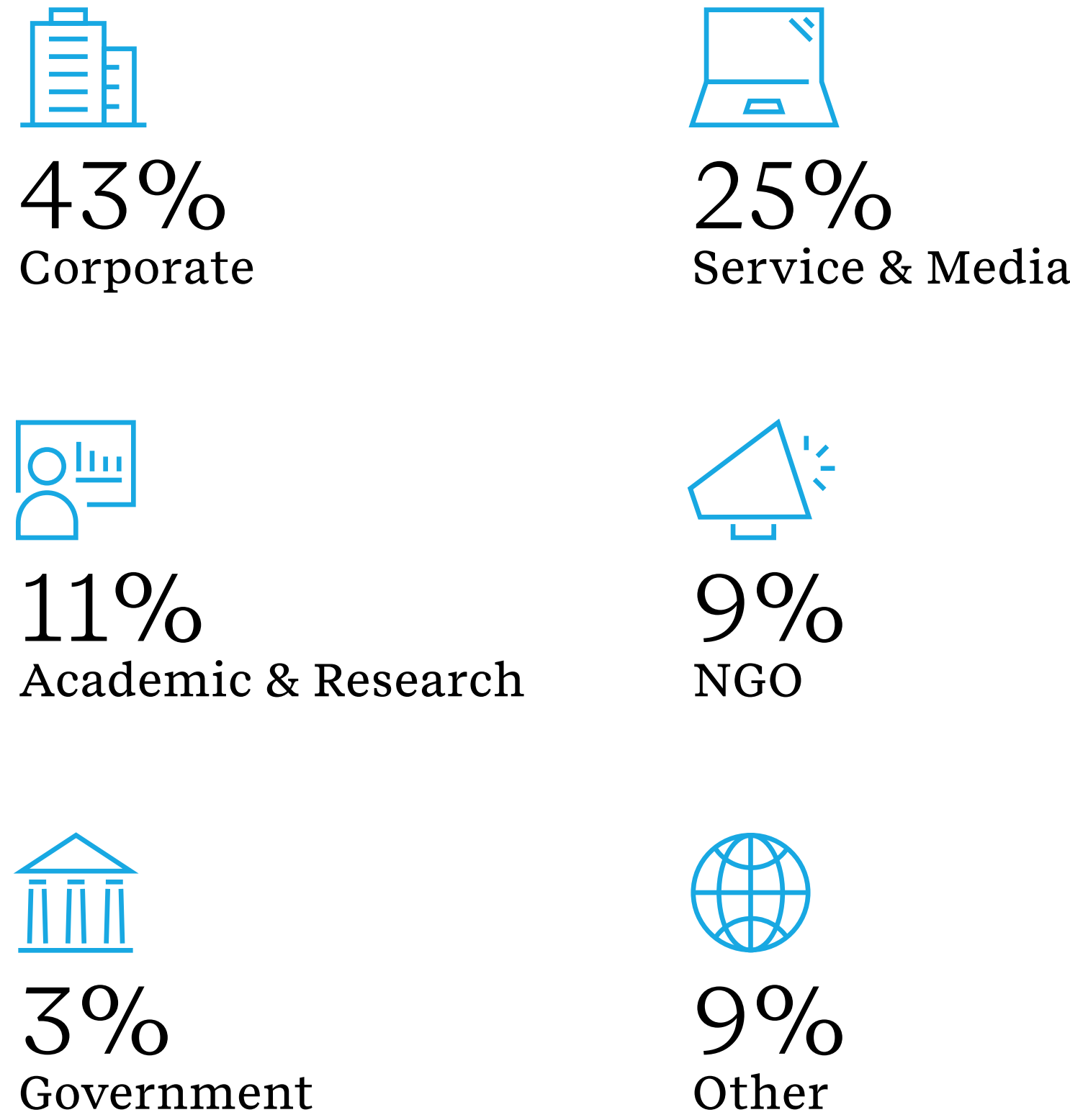
Experience



Geography



Sectors



Executive Summary

Climate Change Remains the Top Sustainability Challenge

When considering the relative urgency of sustainable development challenges, experts continue to rank climate change as the most pressing sustainability issue. At the same time, the perceived urgency of nine out of 18 challenges, such as biodiversity loss, deforestation, water scarcity, food security, poverty, and access to education, has declined compared to previous years, while there are no notable increases in how highly any issues are ranked.

Legislation Continues to Be Seen as the Most Impactful Development Advancing Sustainability, While Disclosure Standards Lose Prominence

New sustainability legislation remains the most significant positive force cited by experts. While sustainability disclosure standards were highly valued in previous years, their perceived importance has diminished. Experts also highlight progress in renewable energy, low-carbon initiatives, and nature-based solutions as critical to advancing the sustainability agenda.

Regional Priorities Shape Diverse Perspectives on Sustainability Action and Development

Distinct regional priorities are shaping sustainability strategies globally: Respondents from Latin America / Caribbean and Africa / Middle East emphasize regional and national actions, Europe recognizes legislative frameworks, Asia-Pacific advances climate and nature-based solutions, and North America focuses on renewable energy and decarbonization, collectively shaping a diverse yet interconnected global agenda.

WWF Retains Top NGO Leadership Position

WWF remains the most recognized NGO for sustainability leadership, followed by Greenpeace, The Nature Conservancy, and World Resources Institute. Experts increasingly mention NGOs focused on biodiversity and climate change as critical players in advancing global sustainability goals.

Patagonia Continues to Lead Corporate Sustainability Rankings

Patagonia continues to lead in terms of recognition as a corporate sustainability leader in integrating sustainability into business strategy, with IKEA, Unilever, and Natura &Co also remaining in the top tier. Additionally, experts recognize companies such as Schneider Electric, Microsoft, Interface, and Ørsted.

Urgency of Sustainability Challenges



Climate Change Remains the Most Urgent Sustainability Challenge

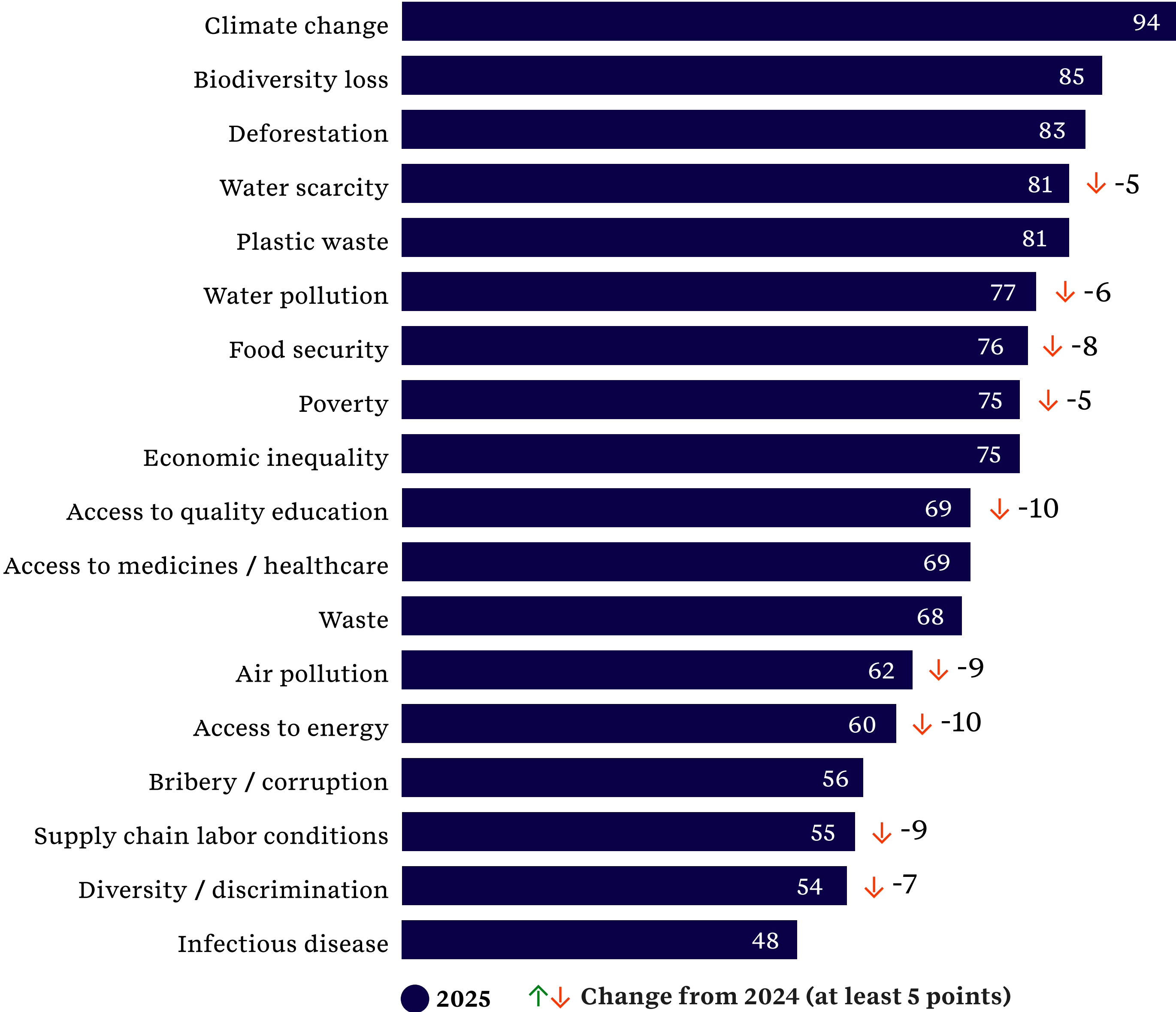
Climate change continues to be perceived by experts as the most critical sustainability challenge amid declining concern across half of the sustainability issues.

There is a notable decline in perceived urgency across issues such as food security, access to quality education, air pollution, access to energy, supply chain labor conditions, and diversity and discrimination. Overall, there is a decrease in perceived urgency for nine of the 18 issues tracked, while there have been no noteworthy increases.

QUESTION

Considering society’s numerous sustainable development challenges, please rate the urgency of each of the following:

PLEASE USE A SCALE OF 1 TO 5 WHERE 1 MEANS “NOT URGENT AT ALL” AND 5 MEANS “VERY URGENT.”



% of Experts, “Urgent” (4+5), 2024–2025

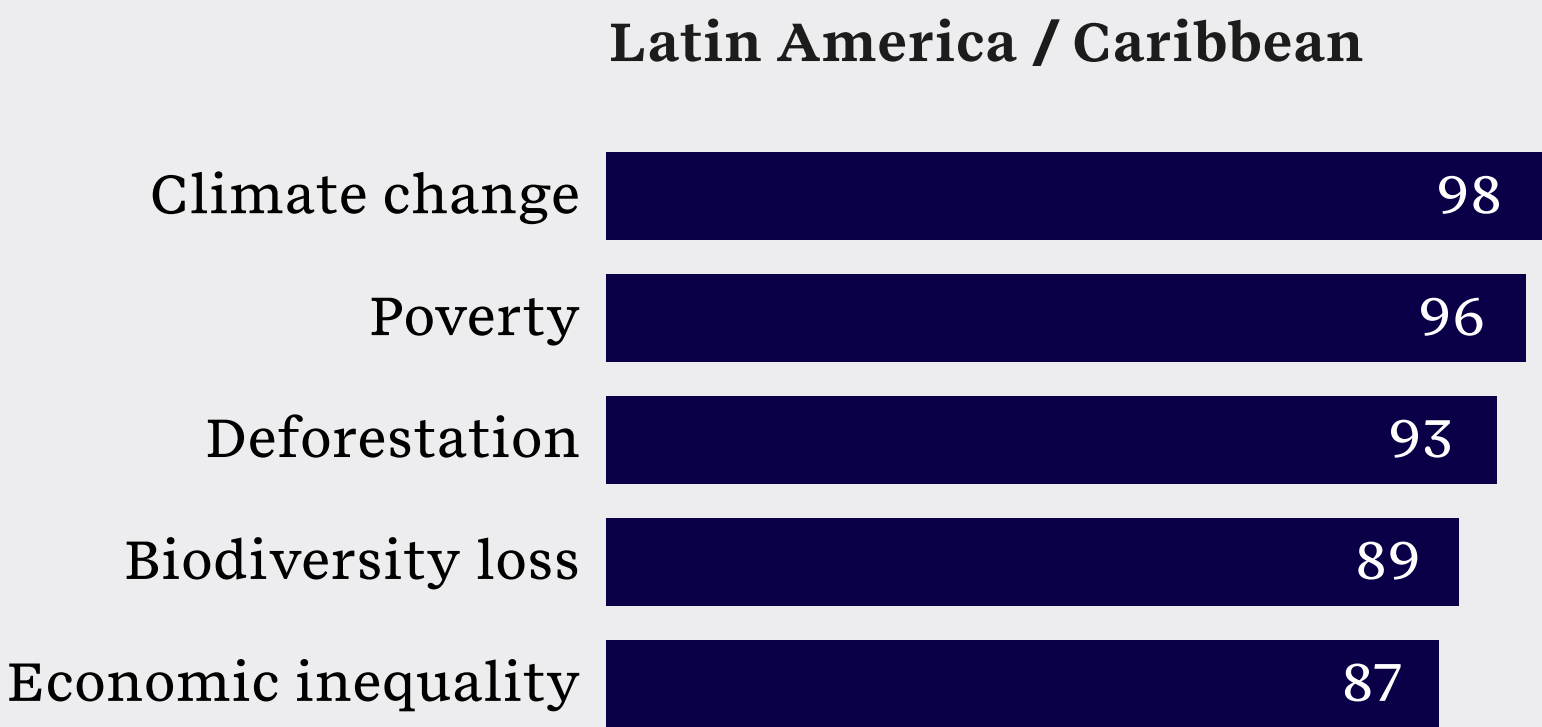
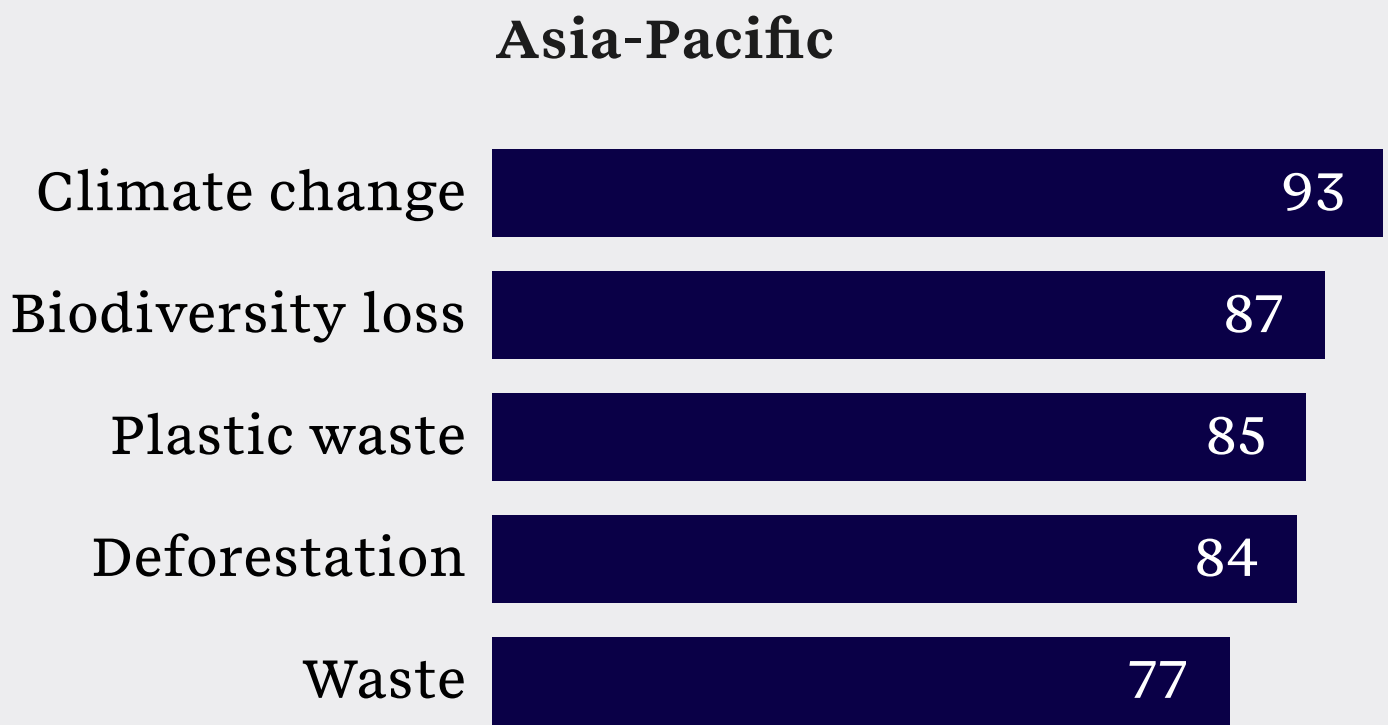
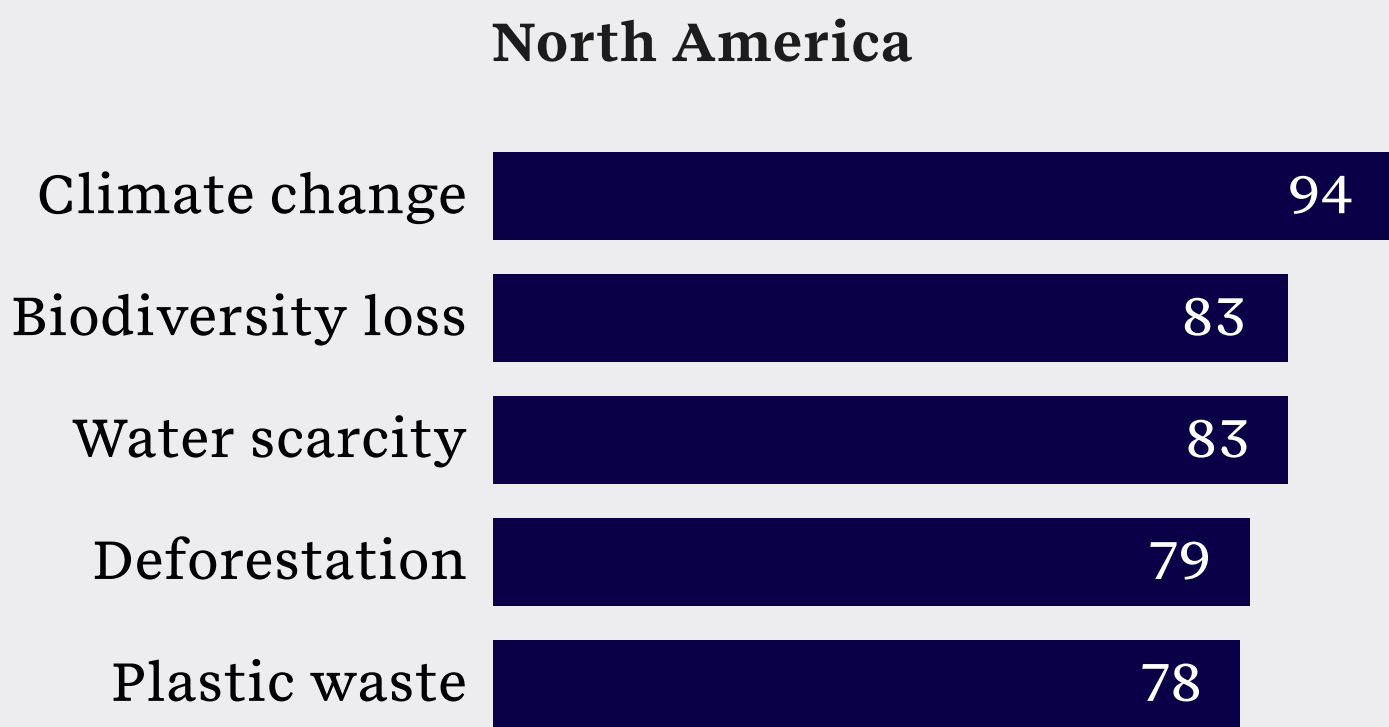
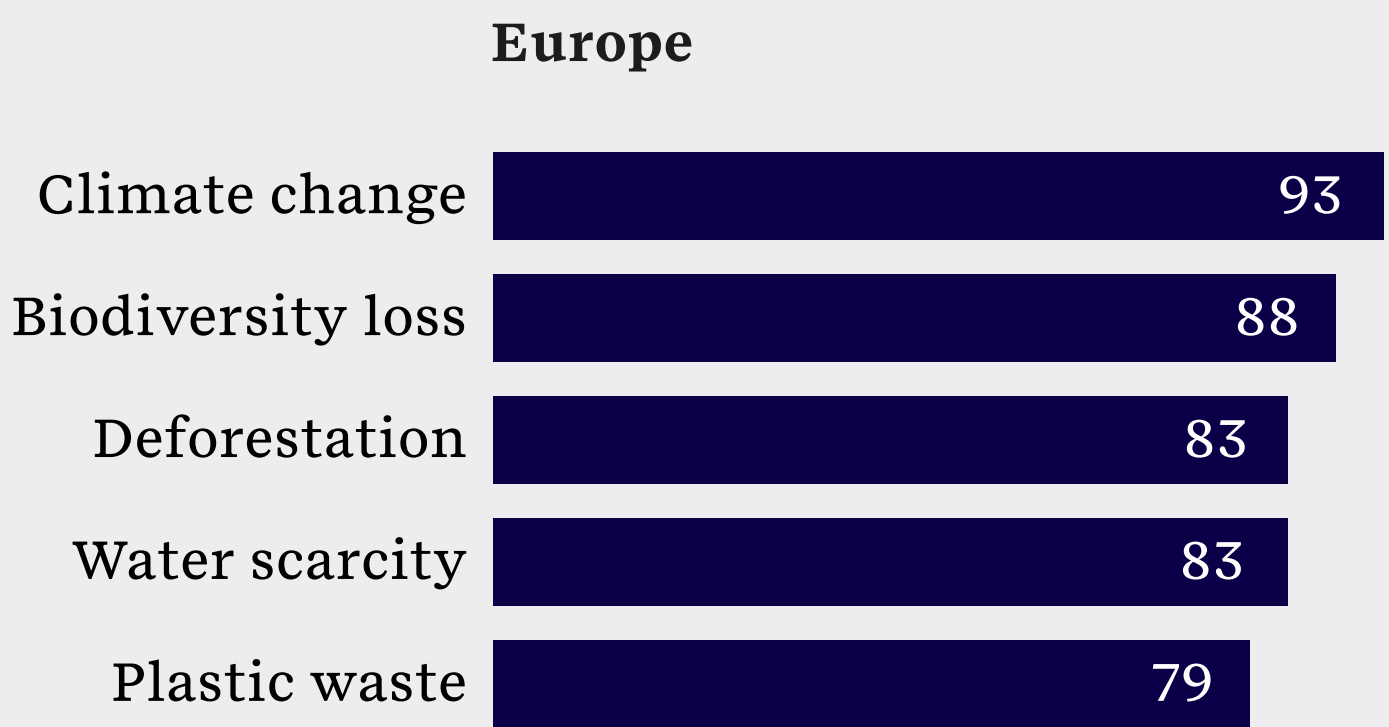
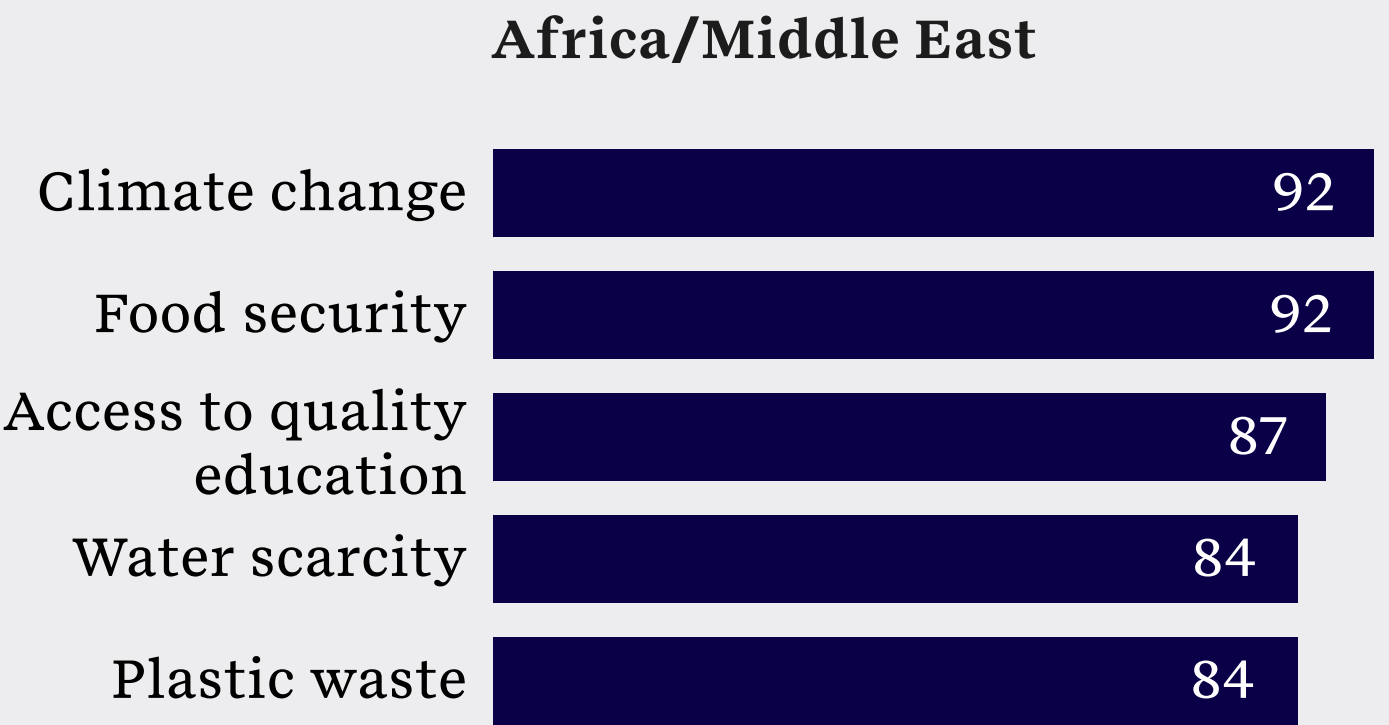
Climate Change Is Seen as the Most Urgent Sustainability Challenge across All Regions

Across all regions, climate change is perceived as the most urgent sustainability challenge, with experts in every region rating it as very urgent. Meanwhile, regions rate the urgency of other issues quite differently: Africa / Middle East stresses food security and education, Latin America / Caribbean focuses more on poverty and deforestation, Asia-Pacific and Europe highlight biodiversity loss and plastic waste, while North America emphasizes biodiversity and water scarcity.

QUESTION

Considering society’s numerous sustainable development challenges, please rate the urgency of each of the following:

PLEASE USE A SCALE OF 1 TO 5 WHERE 1 MEANS “NOT URGENT AT ALL” AND 5 MEANS “VERY URGENT.”



% of Experts, by Region, “Urgent” (4+5), 2025

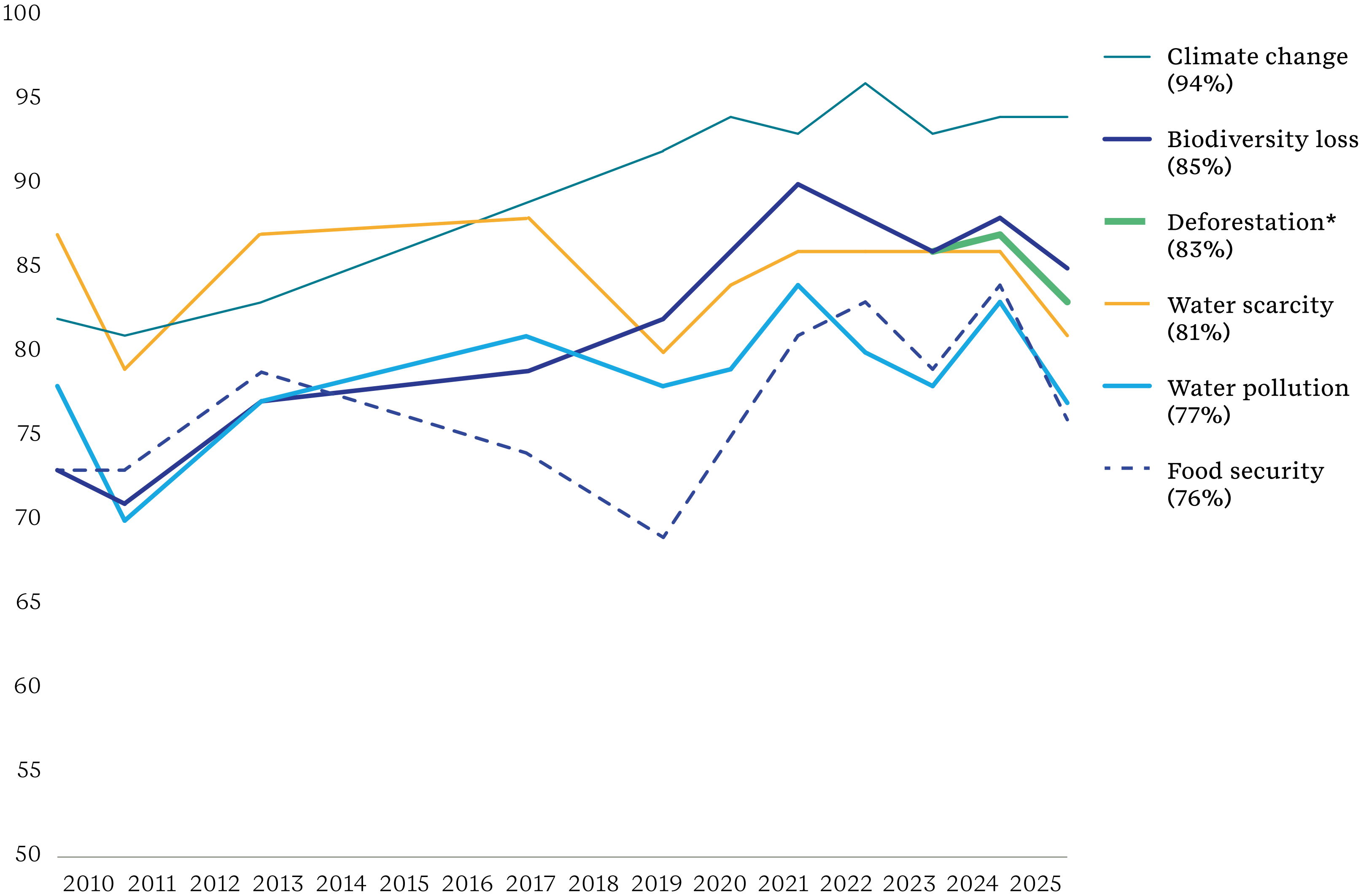
Perceived Urgency of All Sustainability Challenges except Climate Change Has Declined

Experts continue to rate climate change as an extremely urgent sustainability challenge, with its perceived urgency remaining steady compared to last year's figures. However, all other top challenges, including biodiversity loss, deforestation, water scarcity, food security, and water pollution, have experienced varying levels of decline in perceived urgency compared to last year.

QUESTION

Considering society's numerous sustainable development challenges, please rate the urgency of each of the following:

PLEASE USE A SCALE OF 1 TO 5 WHERE 1 MEANS "NOT URGENT AT ALL" AND 5 MEANS "VERY URGENT."



*Asked only in 2023–2025
% of Experts, "Urgent" (4+5), 2010–2025

Most Impactful Sustainability Developments

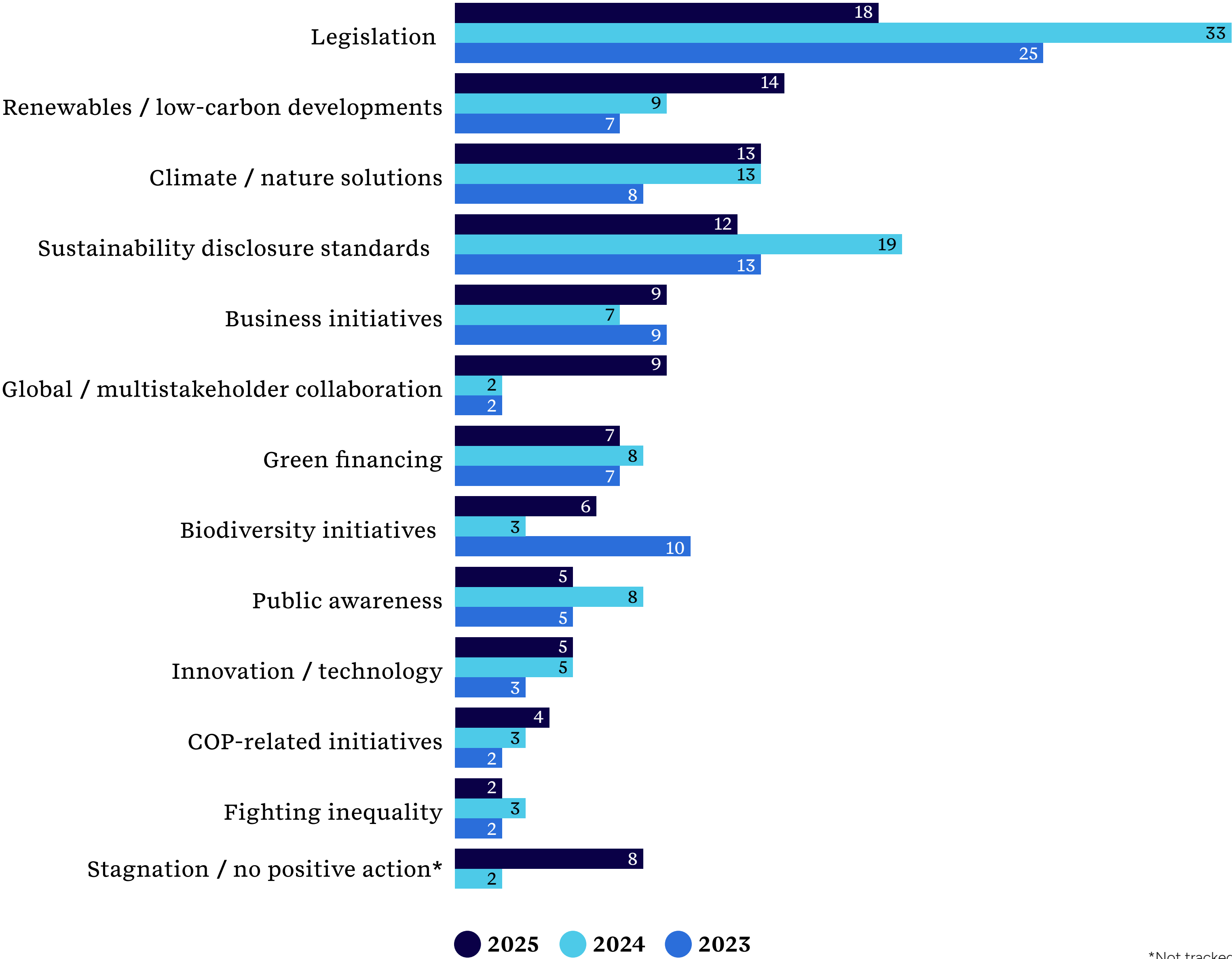


Experts Continue to View Legislation as the Most Impactful Sustainability Development

Despite a decline in overall perceived significance since 2024, experts continue to say new legislation has had the most positive impact on the sustainability agenda in the past year relative to other actions. Experts also emphasize renewables and low-carbon developments, as well as climate and nature solutions as highly impactful in moving the agenda forward.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.



*Not tracked in 2023
% of Experts, Unprompted, 2023–2025

Experts in Different Sectors Have Distinct Views on Most Impactful Recent Developments

Expert responses show that perceptions of which developments are most impactful differs across sectors. Legislation stands out as the most influential development, particularly among corporate and service & media experts. Meanwhile, NGO experts highlight business-led efforts, while academia & research experts also point to climate / nature solutions.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

| | Most positively viewed development | 2 nd most positively viewed development | 3 rd most positively viewed development |
|---------------------|------------------------------------|--|--|
| NGO | 16% Business initiatives | 14% Biodiversity initiatives | 11% Climate / nature solutions; global / multistakeholder collaboration; legislation; stagnation / no positive action |
| Academia & Research | 24% Climate / nature solutions | 19% Global / multistakeholder collaboration | 17% Legislation; renewables / low-carbon developments |
| Corporate | 21% Legislation | 18% Sustainability disclosure | 17% Renewables / low-carbon developments |
| Service & Media | 15% Legislation | 12% Climate / nature solutions | 11% Global / multistakeholder collaboration; renewables / low-carbon developments; sustainability disclosure |

Regions Have Different Perspectives on Positive Sustainability Actions and Developments

There are regional differences in perception of sustainability progress over the past year, with experts in Africa / Middle East, Latin-America / Caribbean, and Europe emphasizing legislation, experts in Asia-Pacific advancing climate and nature-based solutions, and North America-based respondents ranking renewable energy and low-carbon developments highest.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

| | Most positively viewed development | 2 nd most positively viewed development | 3 rd most positively viewed development |
|---------------------------|--|---|--|
| Africa / Middle East | 21% Legislation | 16% Green financing; Renewables / low-carbon developments | 13% Climate / nature solutions |
| Asia-Pacific | 20% Climate / nature solutions | 18% Sustainability disclosure | 17% Legislation |
| Europe | 20% Legislation | 13% Renewables / low-carbon developments; sustainability disclosure | 12% Stagnation / no positive action |
| Latin-America / Caribbean | 16% Legislation; climate / nature solutions | 14% COP-related initiatives; global / multistakeholder collaborations; Sustainability disclosure | 9% Business initiatives |
| North America | 18% Renewables / low-carbon developments | 14% Legislation | 12% Business initiatives |

Recent Positive Sustainability Developments:

Quotes from Experts

Below we share some verbatim quotes from respondents around the world on the most significant positive action or development they have observed over the past 12 months.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

“International agreements and regulations mandating corporate sustainability and climate-related disclosures.”

Corporate, Italy

“I am generally pessimistic, but I am hopeful that the increasingly like-minded will come together to fill the large gaps left by the loss in government leadership, particularly in the U.S. The continued development of the SASB standards and others suggests that creative thinking on sustainability has not been lost. The challenge ahead must be to come up with new ways of thinking about sustainability solutions even when governments have pulled back.”

Service / Media, Mexico

“As the space is disrupted in the United States, other regions seem to be stepping up to take leadership roles in innovation, finance, and policy, and Singapore is especially noteworthy. Considering the population of Asia and Southeast Asia, this could be a game changer, bringing urgent actions to the water, food, energy, and climate nexus.”

Academia & Research, United States

“The past 12 months have felt stagnant or even negative in relation to the broad sustainability agenda.”

Corporate, United Kingdom

Recent Positive Sustainability Developments:

Quotes from Experts

Below we share some verbatim quotes from respondents around the world on the most significant positive action or development they have observed over the past 12 months.

QUESTION

Over the past 12 months, what has been the most significant positive action or development related to the sustainability agenda? This action or development may have come from the public sector, civil society, business, finance and investment, or any other part of society.

“Those who are serious about sustainability are extending their impact across their value chain, both in depth and breadth, and at a scale not seen in previous years. This includes addressing human rights, decarbonization, and the use of products / services sold.”

Other, Australia

“One of the most significant positive actions related to the sustainability agenda over the past 12 months is the rapid growth of renewable energy, particularly solar and wind power.”

Academia & Research, India

“Information provision and interventions, especially in the industries to reduce climate change.”

Academia & Research, Zambia

“Some countries are adopting the IFRS S1 and S2, and some companies are already releasing adherent reports. This matters because this framework includes more topics and disclosures and should incentivize more investment and action.”

Corporate, Jordan

“The growth in the focus on the need for a more circular approach to consumption, production, and end-of-life reuse and recovery. This needs to be backed by stronger leadership and policy signals from the EU to prompt more widespread business initiatives.”

Corporate, Republic of Ireland

NGO Leaders



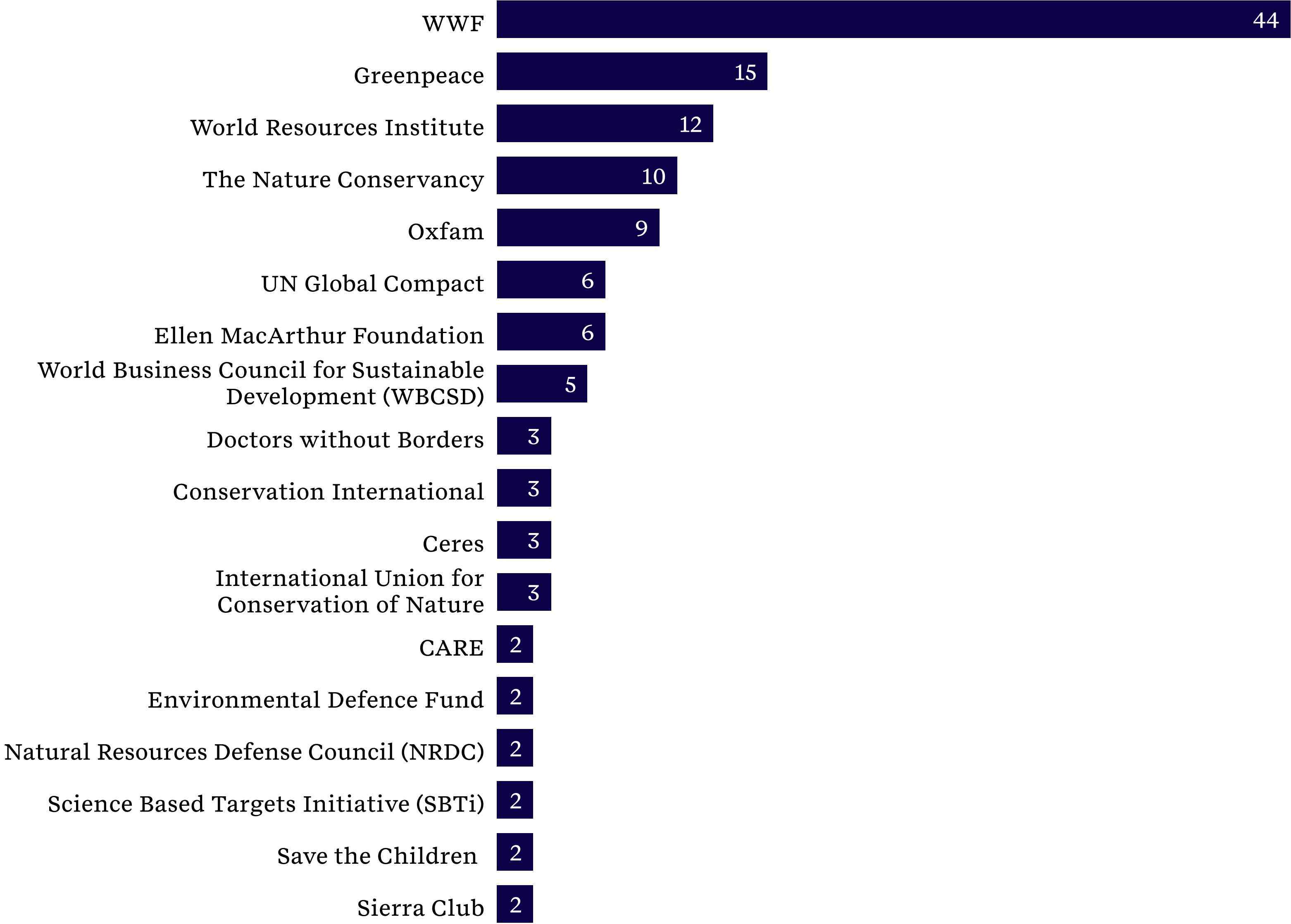
WWF Is the Most Recognized NGO for Sustainability Leadership

WWF remains the most frequently cited leader among NGOs, with more than two in five experts recognizing its leadership role in advancing sustainable development. Other organizations frequently mentioned as leaders include Greenpeace, World Resources Institute, and The Nature Conservancy.

QUESTION

Which specific NGOs do you think are leaders in advancing sustainable development?

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.



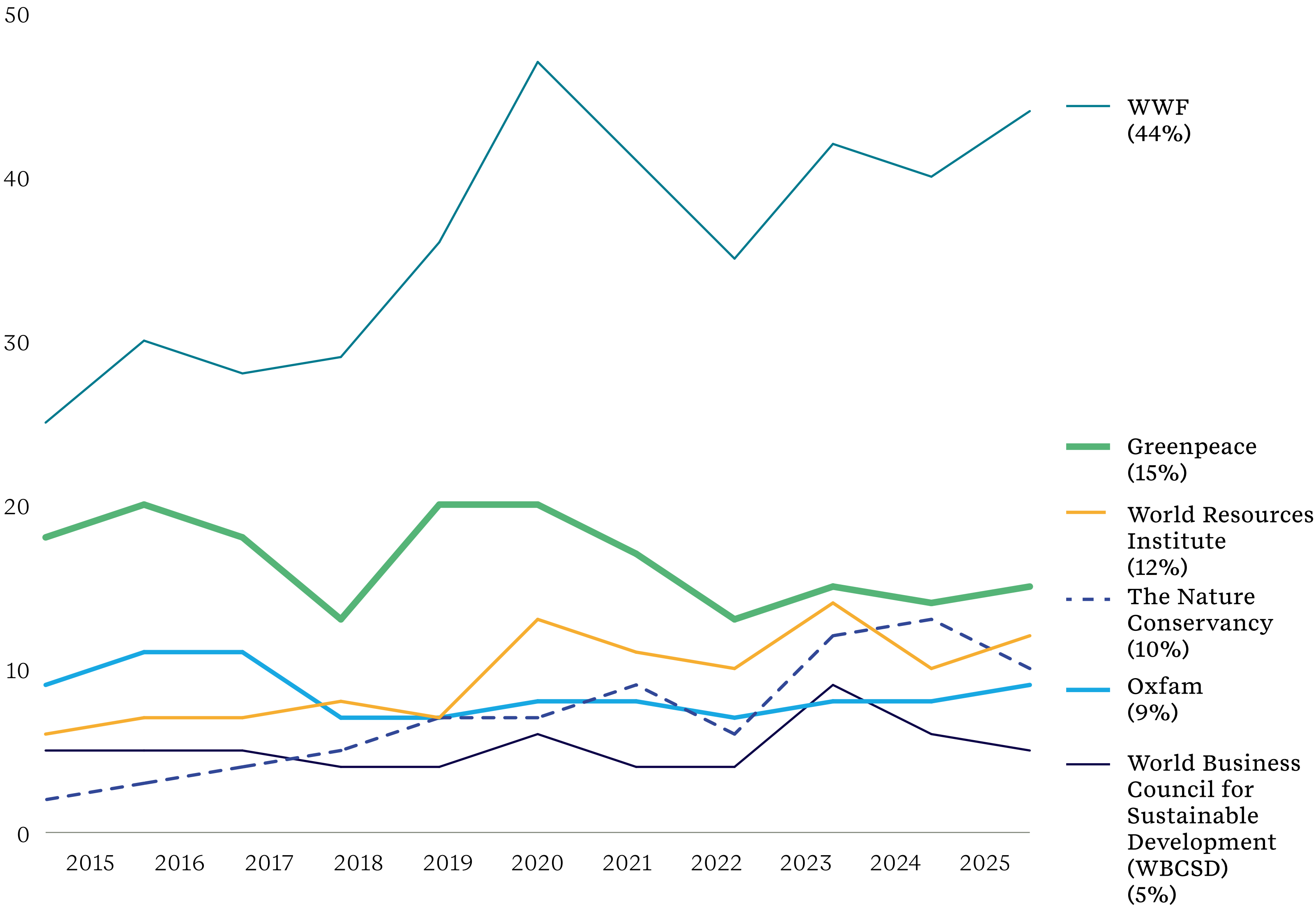
WWF Has Remained Top of Mind among Experts over the Past Decade

WWF has been the most recognized NGO among our panel of sustainability experts over the past decade, while Greenpeace has consistently remained the runner-up.

QUESTION

Which specific NGOs do you think are leaders in advancing sustainable development?

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.



Experts in All Sectors and Regions Recognize WWF as a Sustainability Leader

WWF is the most-mentioned NGO among experts in all sectors and all regions.

QUESTION

Which specific NGOs do you think are leaders in advancing sustainable development?

PLEASE ENTER A MAXIMUM OF THREE NGOS IN THE SPACES PROVIDED.

| | NGO | Academic & Research | Corporate | Service & Media | Africa / Middle East | Asia-Pacific | Europe | Latin America / Caribbean | North America |
|----------------------------------|-----|---------------------|-----------|-----------------|----------------------|--------------|--------|---------------------------|---------------|
| World Wide Fund for Nature (WWF) | 35% | 51% | 46% | 44% | 24% | 50% | 44% | 47% | 43% |
| Greenpeace | 19% | 19% | 14% | 16% | 5% | 13% | 26% | 18% | 5% |
| World Resources Institute | 19% | 9% | 13% | 12% | 11% | 12% | 9% | 22% | 12% |
| The Nature Conservancy | 11% | 14% | 8% | 16% | 5% | 10% | 6% | 13% | 17% |
| Oxfam | 11% | 12% | 7% | 10% | 8% | 5% | 13% | 7% | 10% |
| UN Global Compact | 8% | 0% | 11% | 3% | 5% | 4% | 10% | 11% | 3% |
| Ellen McArthur Foundation | 0% | 2% | 5% | 11% | 3% | 2% | 6% | 2% | 10% |
| WBCSD | 0% | 0% | 5% | 8% | 3% | 7% | 4% | 4% | 4% |
| Doctors Without Borders | 0% | 2% | 5% | 2% | 3% | 4% | 3% | 4% | 2% |
| Conservation International | 3% | 7% | 4% | 1% | 0% | 5% | 1% | 2% | 6% |

Corporate Leaders



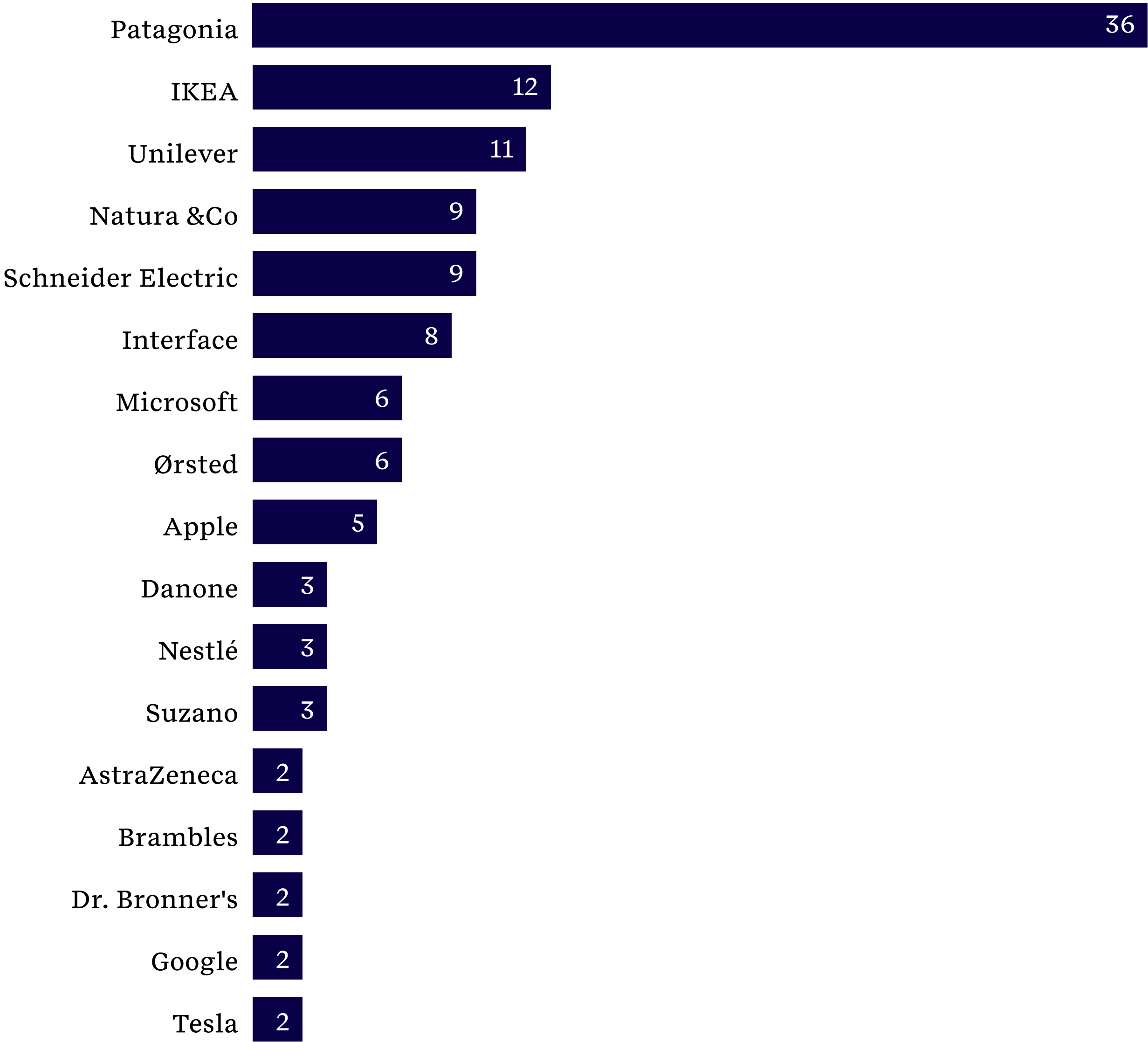
Patagonia Is the Most Recognized Company for its Sustainability Leadership, Followed by IKEA and Unilever

Patagonia continues to lead company rankings for sustainability integration practices, being cited by over a third of experts as a leader. IKEA and Unilever follow, each mentioned by roughly one in ten experts. Other companies recognized as leaders include Natura &Co, Schneider Electric, Interface, Microsoft, Ørsted, Apple, Danone, Nestlé, Suzano, AstraZeneca, Brambles, Dr. Bronner’s, Google, and Tesla, with AstraZeneca, Brambles, and Dr Bronner’s appearing on the list for the first time. Experts mentioned over three hundred different companies as leaders, emphasizing great diversity of leadership globally.

QUESTION

Which specific companies do you think are leaders in integrating sustainability into their business strategy?

PLEASE ENTER A MAXIMUM OF THREE COMPANIES IN THE SPACES PROVIDED.



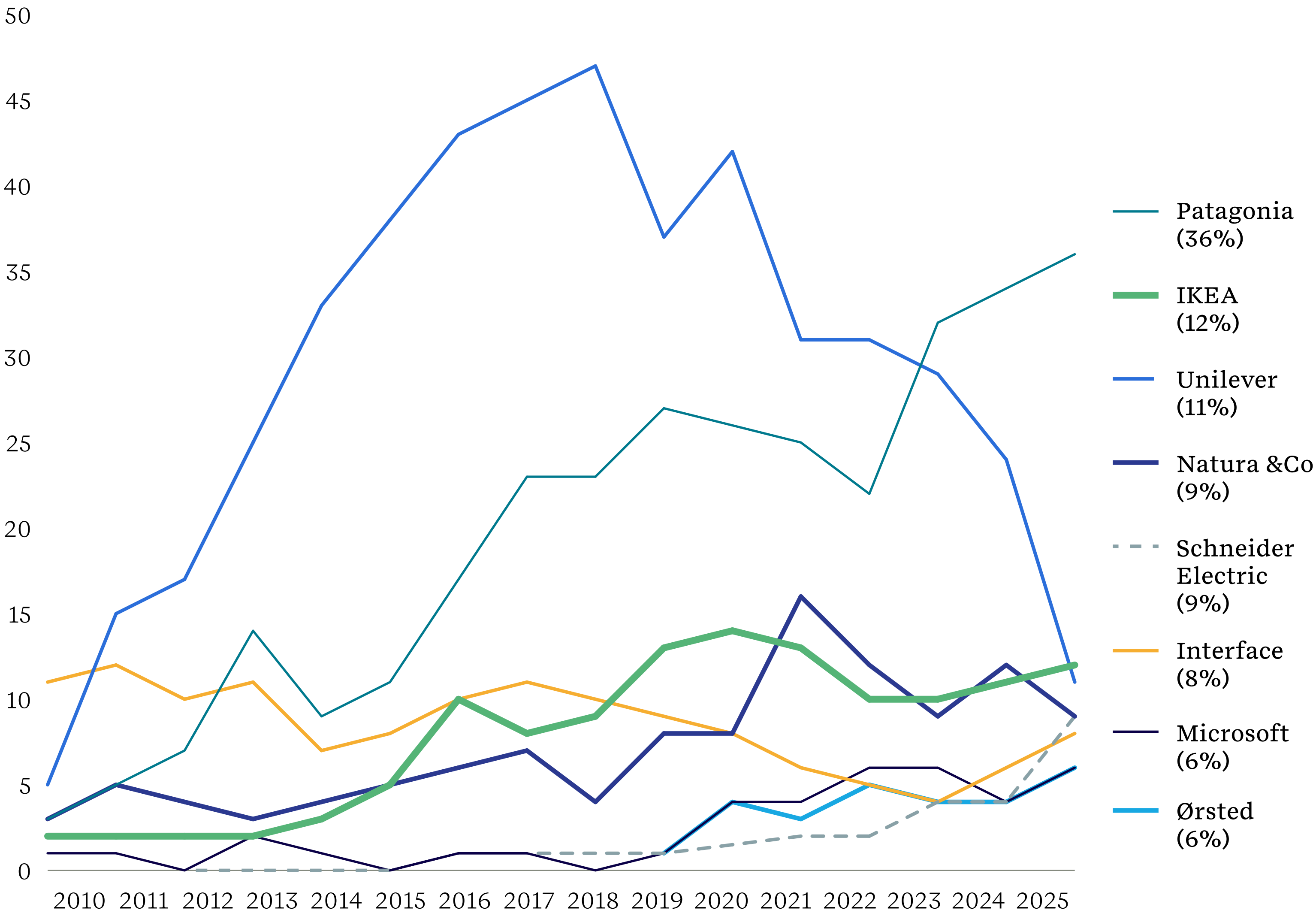
Patagonia Receives the Most Recognition for Sustainability Leadership for the Third Year in a Row

Unilever held the top position in sustainability integration practices for over a decade, reaching its peak in 2018. However, the landscape has shifted, with Patagonia emerging as the most recognized leader for the past three years. Meanwhile, recognition of other companies in the top tier has remained relatively stable, suggesting a mature and consolidated group of recognized sustainability leaders.

QUESTION

Which specific companies do you think are leaders in integrating sustainability into their business strategy?

PLEASE ENTER A MAXIMUM OF THREE COMPANIES IN THE SPACES PROVIDED.



Recognized Sustainability Leadership Is Driven by Making Sustainability a Core Business Driver and Showing Evidence of Impact

Experts emphasize that recognized corporate leaders make sustainability a core business driver and give evidence of impacts and actions resulting from their efforts.

QUESTION

Why do you think [INSERT COMPANY #1] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.



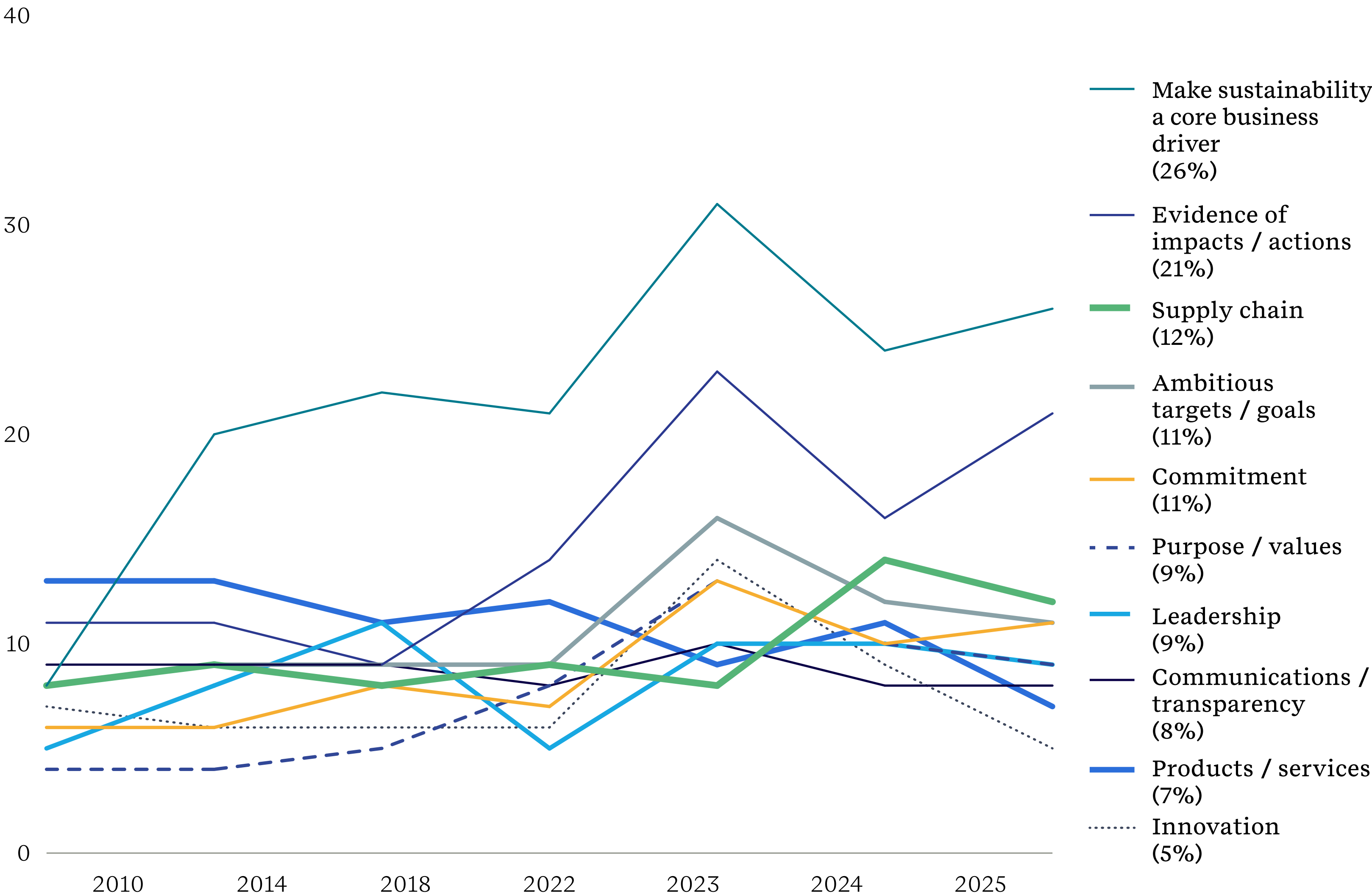
Recognized Sustainability Leadership Is Driven by Making Sustainability a Core Business Driver and Showing Evidence of Impact

Embedding sustainability into business strategy and demonstrating measurable impacts have become the most influential factors for recognized leadership, outpacing other elements like supply chain, innovation, and transparency.

QUESTION

Why do you think [INSERT COMPANY #1] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.



Making Sustainability a Core Business Driver and Impact Drive Recognized Leadership across Sectors and Regions

Integrating sustainability into business strategy, demonstrating impact, and focusing on the supply chain are consistent drivers of recognized leadership across all sectors and regions. Experts in Latin America / Caribbean are particularly likely to say integration is the reason they recognize corporate sustainability leadership.

QUESTION

Why do you think [INSERT COMPANY #1] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.

| | NGO | Academic & Research | Corporate | Service & Media | Africa / Middle East | Asia-Pacific | Europe | Latin America / Caribbean | North America |
|---------------------------|------------------------------------|---|--|---|---|---|---|---|---|
| Most important driver | 22% Supply chain | 23% Make sustainability a core business driver | 32% Make sustainability a core business driver | 22% Make sustainability a core business driver | 24% Make sustainability a core business driver | 34% Make sustainability a core business driver | 27% Make sustainability a core business driver | 31% Make sustainability a core business driver | 25% Evidence of impact / action |
| 2nd most important driver | 19% Leadership | 21% Evidence of impact / action | 24% Evidence of impact / action | 21% Evidence of impact / action | 21% Evidence of impact / action | 22% Evidence of impact / action | 18% Evidence of impact / action | 22% Evidence of impact / action | 17% Make sustainability a core business driver |
| 3rd most important driver | 16% Evidence of impact / action | 14% Supply chain; Product / services | 13% Ambitious targets / goals; Communication / transparency | 17% Commitment | 11% Innovation; Leadership; Communication / transparency | 15% Supply chain | 12% Purpose / values; Commitment | 20% Commitment | 13% Products / services |

% of Experts, by Sector and Region, Unprompted, 2025

*Government sector was not included in this analysis due to small sample size

Drivers of Corporate Sustainability Leadership:

Quotes from Experts

Below we share some verbatim quotes from respondents around the world on reasons why they name a specific company as a leader in sustainability.

QUESTION

Why do you think [INSERT COMPANY] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.

“Patagonia’s approach proves that profitability and purpose can coexist, and it continues to inspire other companies to adopt more sustainable and ethical practices.”

Corporate, Denmark

“They partner and implement sustainable projects and strengthen capacity of other institutions in sustainable development.”

NGO, Ghana

“Strategy includes a robust contribution to carbon capture with long-term vision connected to global and sector challenges.”

Service / Media, Brazil

“Regenerative business model with ambitious targets and admirable execution.”

Service / Media, Indonesia

“For their contribution to sustainable food production and improving the living conditions of producers.”

Academia & Research, Mexico

“Clear targets, transparent communication, and real actions.”

Corporate, Netherlands

Drivers of Corporate Sustainability Leadership:

Quotes from Experts

Below we share some verbatim quotes from respondents around the world on reasons why they name a specific company as a leader in sustainability.

QUESTION

Why do you think [INSERT COMPANY] is a leader in sustainable development?

PLEASE ENTER UP TO TWO RESPONSES IN THE SPACES PROVIDED.

“Ørsted completely reinvented itself from one of Europe’s most fossil-fuel-intensive energy companies to a global leader in offshore wind and renewable energy. It now generates nearly all its power from renewables and actively helps other sectors decarbonize, proving that large-scale, profitable sustainability transitions are possible.”

Service / Media, New Zealand

“Integration of social, environmental, and financial aspects and genuine concern for the supply chain and preservation of biodiversity.”

Other, Brazil

“Accountability is embedded into the business structures at all levels, and the Chief Executive leads and sets the agenda.”

Other, India

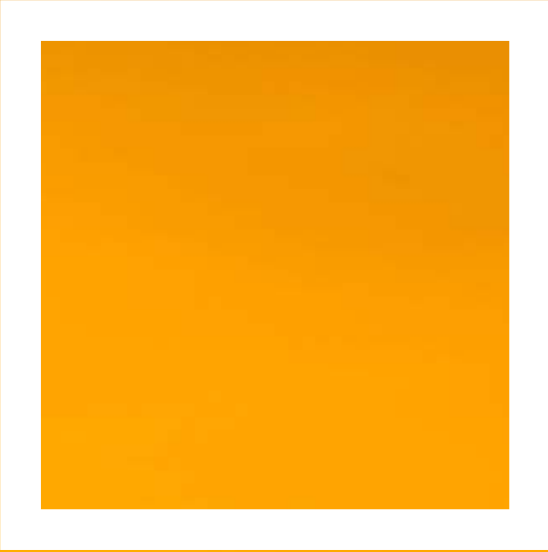
“Transparency on materials and manufacture, and not bowing to market pressures and profit-seeking investors.”

Corporate, Republic of Ireland

“It has strong policy to realize a sustainable society and is actually implementing measures in line with that policy.”

Corporate, Japan

Regional Corporate Leaders



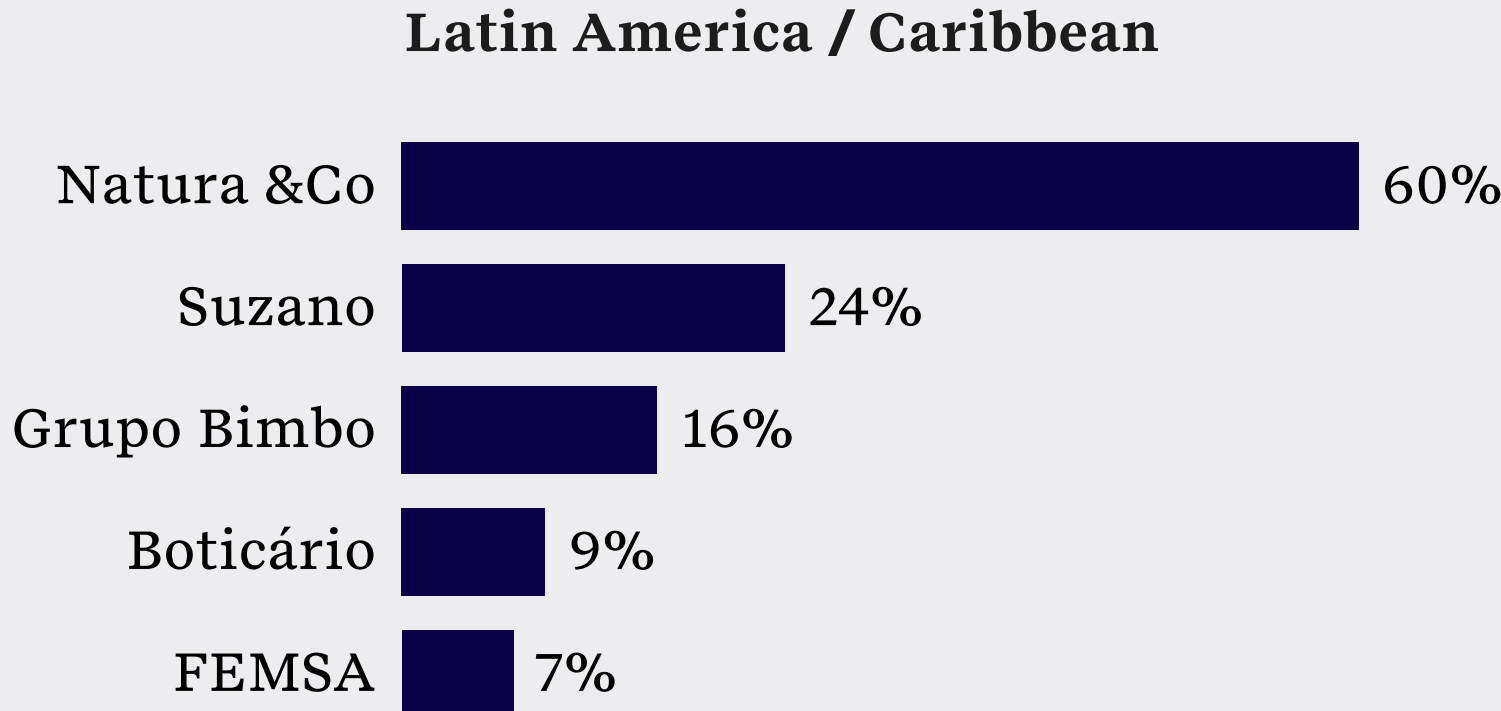
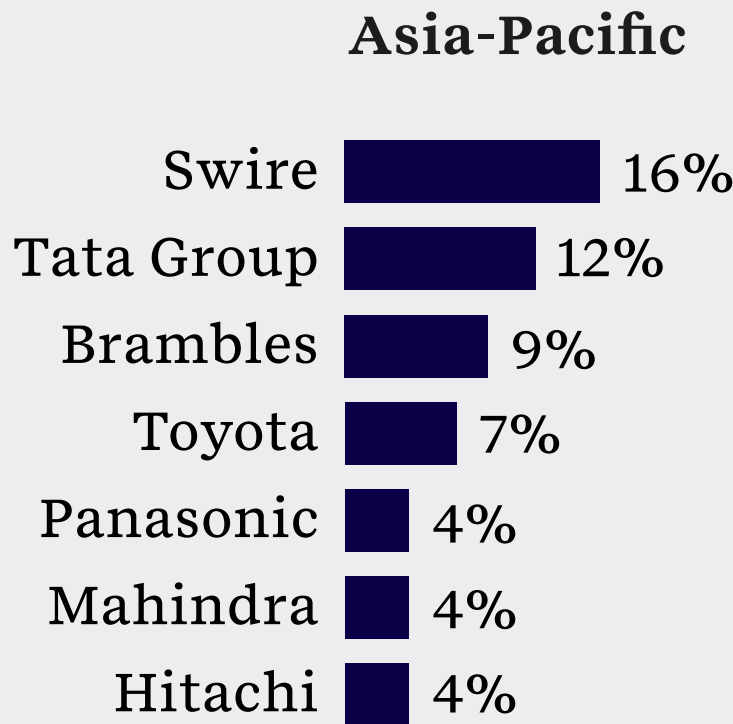
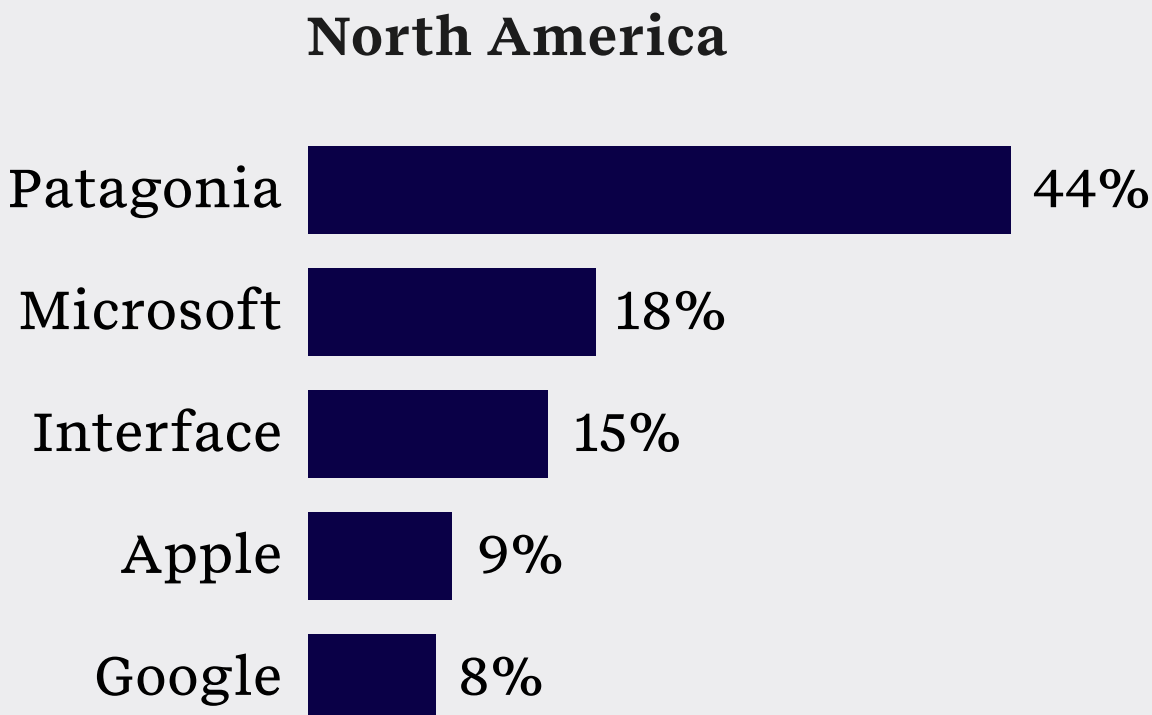
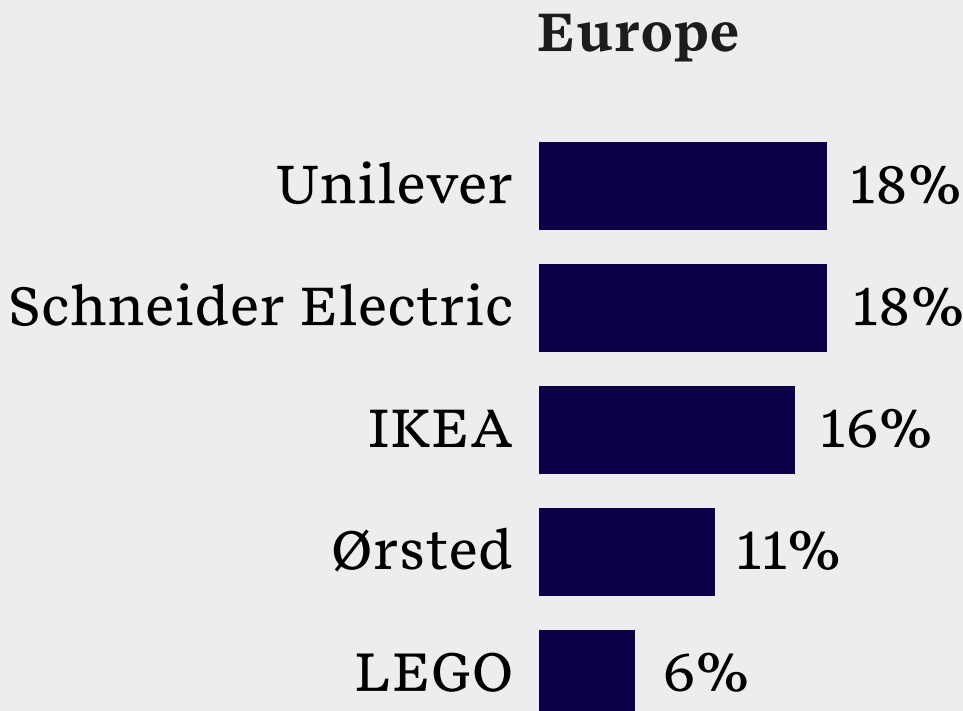
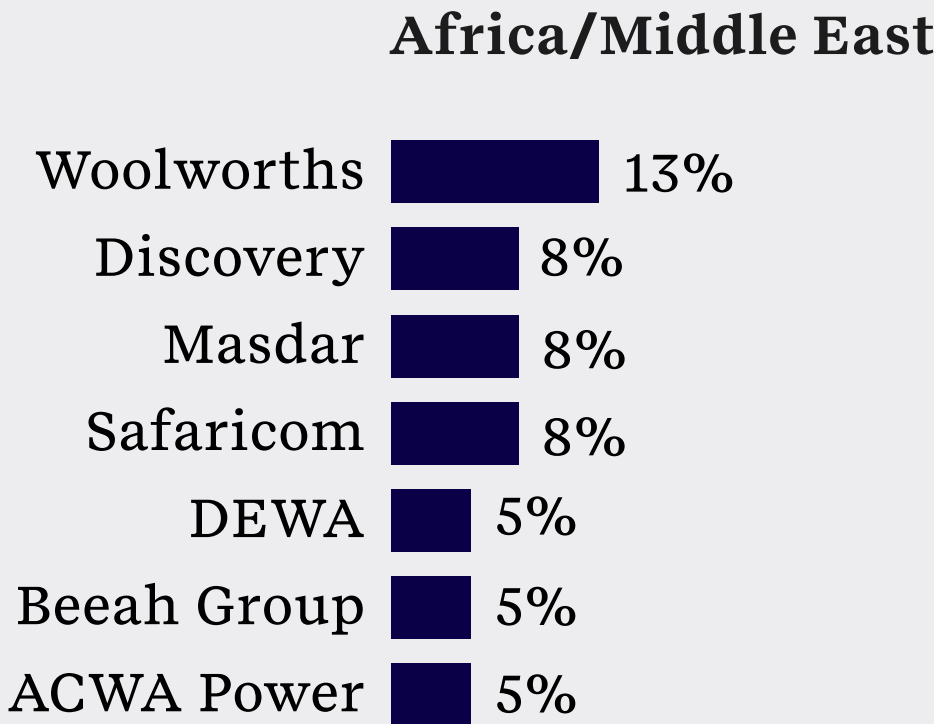
Regional Champions of Corporate Sustainability Recognized by Experts

When experts are asked to identify sustainability leaders among companies headquartered in their regions, some regionally recognized leaders emerge. More than half of surveyed experts in Latin America / Caribbean point to Natura &Co, while in Africa / Middle East, Woolworths stands out as a regional frontrunner. Swire and Tata Group are most recognized in Asia-Pacific, while Unilever and Schneider Electric top the rankings in Europe. Patagonia stands out as the most recognized corporate sustainability leader among North American experts.

QUESTION

Which companies headquartered specifically in [region where respondent is based] do you think are leaders in integrating sustainability into their business strategy?

PLEASE ENTER UP TO THREE RESPONSES.



% of Experts by Region, Unprompted, 2025



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