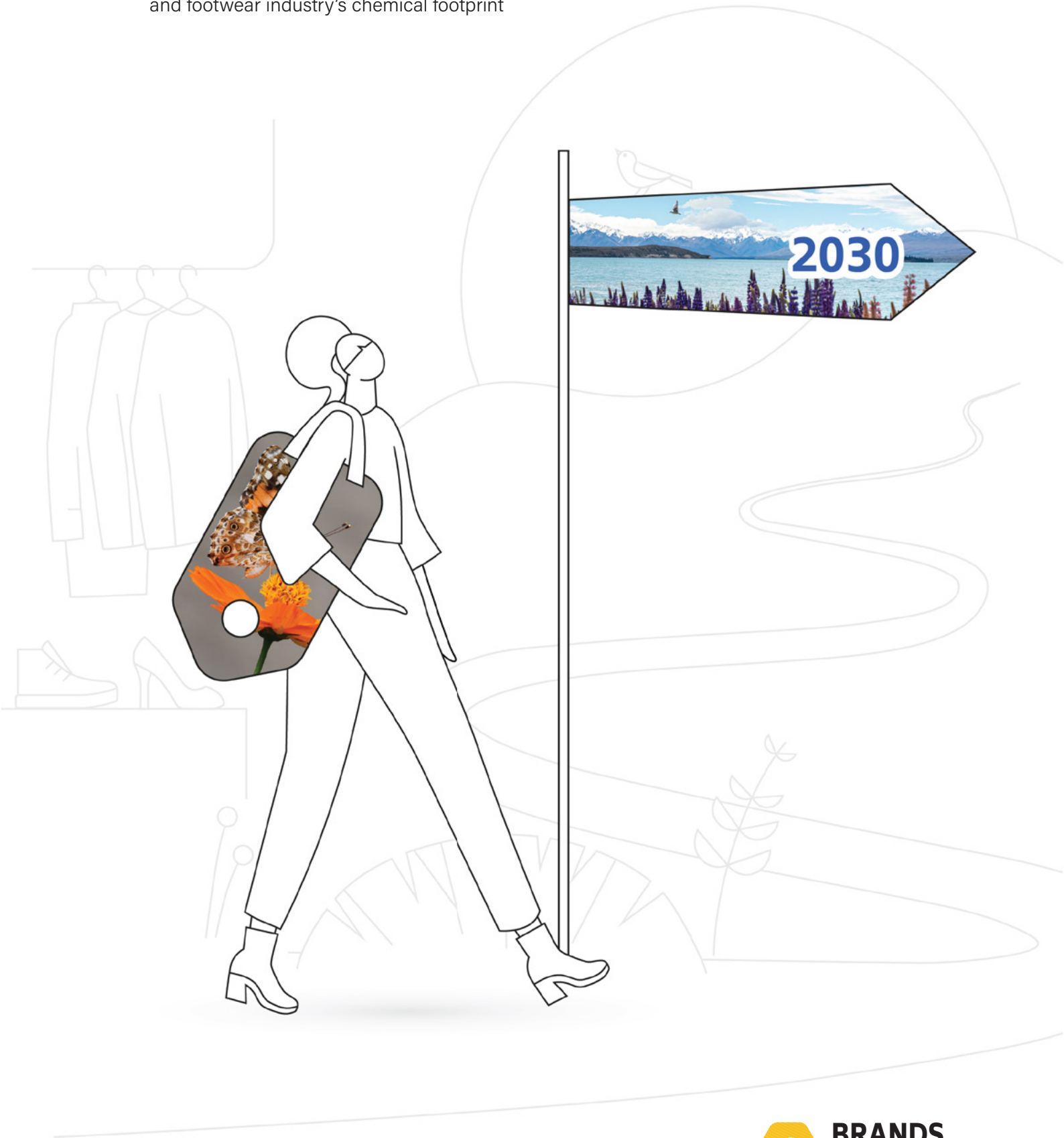


2025 BRANDS TO ZERO REPORT

Protecting the planet by reducing the fashion
and footwear industry's chemical footprint



BRANDS
to Zero By Ø ZDHC



SECTION 1

Introduction

- 4 General Disclaimer
- 5 ZDHC 2030 Impact Strategy
- 6 ZDHC's Vision
- 7 The ZDHC Roadmap to Zero Programme
- 8 Our Impact in 2024

SECTION 2

The Brands to Zero Programme & 2025 Report

- 10 ZDHC Leaders to Zero Programme
- 11 The Brands to Zero Programme
- 12 Brands to Zero: Assessment and Scoring
- 13 The Brands to Zero Assessment Questionnaire
- 14 Brands to Zero Segments
- 15 KPI's, Metrics & Scoring: High-Level Overview
- 16 Updates from 2024 Assessment
- 17 Visibility and Recognition
- 18 Brand Leaderboards
- 19 The Road Ahead



SECTION 1

Introduction

Dear Brand Leadership,

It is a pleasure to present the 2025 Brands to Zero Report, an important milestone in our shared journey to drive responsible chemical management through the value chain.

As global supply chains face increasing scrutiny, complexity and disruption, the need for robust and transparent due diligence has never been greater. The Brands to Zero (BtZ) Programme is rooted in the OECD Due Diligence Guidance for Responsible Business Conduct, offering a structured, actionable framework that helps brands align with growing regulatory expectations, most notably the EU Corporate Sustainability Due Diligence Directive (CSDDD).

BtZ supports brands in turning high-level commitments into concrete action. By assessing performance across both corporate and supply chain levels, BtZ provides a clear picture of how due diligence is embedded into business processes, governance and supply chain engagement. This includes setting expectations, offering supplier support, tracking implementation and enabling remediation where needed. In doing so, BtZ helps brands build resilience, trust, and measurable impact, even amid volatile and shifting supply chain conditions.

In 2024, we saw significant growth in participation, demonstrating the industry's recognition that collective action is the most effective path forward. This year's report highlights the progress made, gaps to be addressed and the steps needed to move from compliance to transformation.

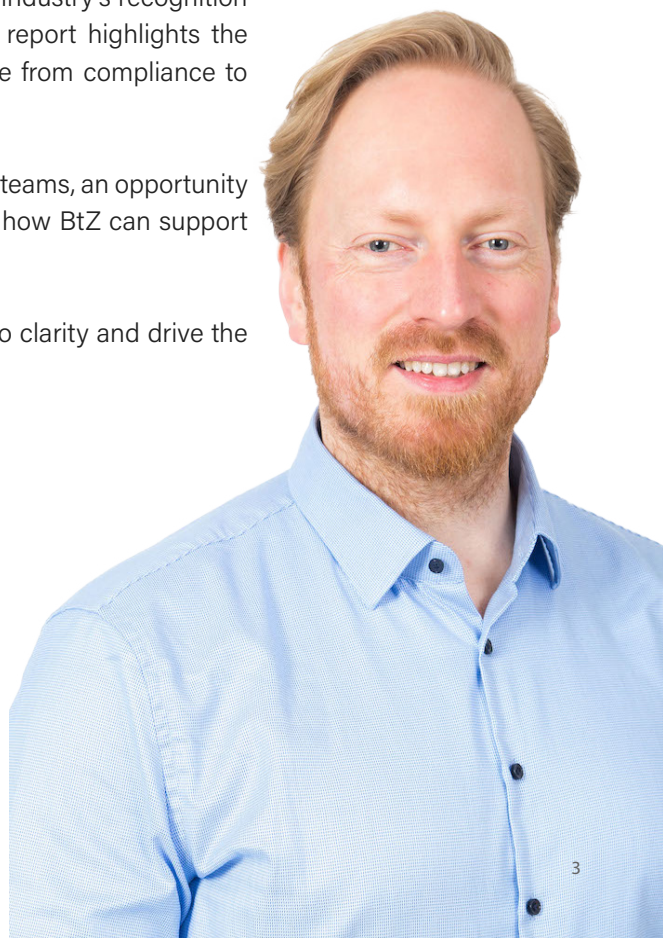
We encourage you to use this report as a conversation starter with your teams, an opportunity to reflect on achievements, align cross-functional efforts, and explore how BtZ can support your brand's sustainability and regulatory strategies going forward.

With shared responsibility and joint action, we can turn complexity into clarity and drive the shift from intent to impact.

Sincerely,

Klaas Nuttbohm

The ZDHC Foundation



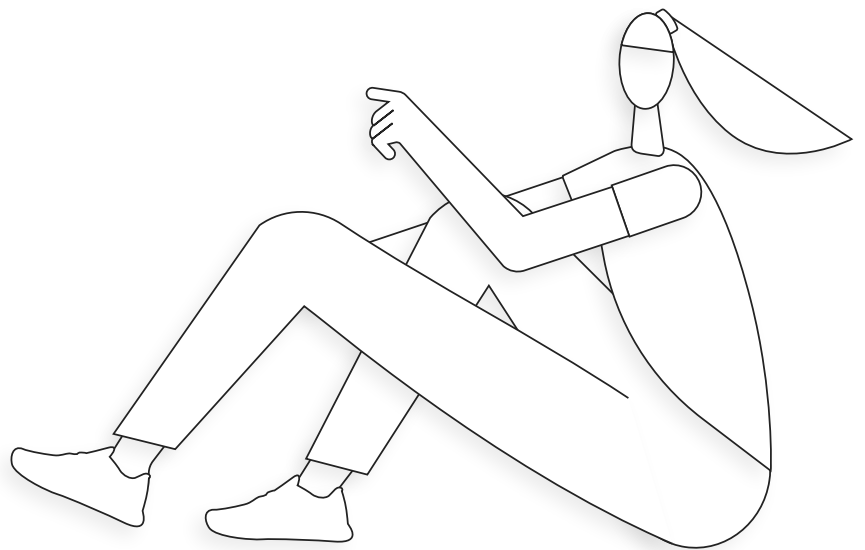


General Disclaimer

Whilst ZDHC takes every reasonable effort to make sure that the content of and information contained in this BRANDS TO ZERO REPORT 2025 is as accurate as possible at the time of publication, ZDHC makes no claims, promises, or guarantees about the accuracy, completeness, or adequacy of the contents of this document.

In no event will ZDHC (and/or any related ZDHC majority owned legal entities) or the Directors or staff thereof be liable and ZDHC expressly disclaims any liability of any kind to any party for any loss, damage, or disruption caused:

1. by errors or omissions, whether such errors or omissions result from negligence, accident, or any other cause; and/or
2. from any use, decision made or action taken or any other kind of reliance on the BRANDS TO ZERO REPORT 2025 by a reader or user of it; and/or
3. for any results obtained or not obtained from the use of the BRANDS TO ZERO REPORT 2025





— ZDHC 2030 Impact Strategy

Protecting our ecosystems is more urgent than ever. If we want to eliminate hazardous chemicals in the global fashion industry by 2030, there's not a second to waste.

We have taken stock over the last few years and reflected on our strategic priorities. In 2022, we shifted from our five-year Growth Strategy (2017-2022) to our Impact Strategy, which will guide all ZDHC activities until 2030.



Protecting ecosystems is more urgent than ever. To eliminate hazardous chemicals from the global fashion industry by 2030, there's no time to waste.

ZDHC's 2030 Impact Strategy marks a shift from growth to measurable change — embedding sustainable chemical management from farm to end-of-life, scaling innovation, leveraging data, and engaging policy to drive systemic transformation.

Our priorities this year

- **Deepen Impact:** Strengthen the focus on actual outcomes, not just implementation, especially through supplier training, data tracking and local engagement.
- **Refine Tools:** Continue evolving the ZDHC MRSL, streamline the Sustainable Chemical Management Framework and launch new guidance on air emissions and fibre pollution.
- **Digital Upgrade:** Roll out the new ZDHC DataHub platform to improve traceability, insights and access to verified chemical data.
- **Expand Regionally:** Focus on onboarding and support in new hubs like Brazil and Turkey to drive adoption globally.
- **Link to Climate & Nature:** Integrate chemical management with climate action, water stewardship and biodiversity protection through the new "Nature Strategy."
- **Boost Collaboration:** Partner with organisations like Textile Exchange and The Microfibre Consortium to align industry efforts and reduce audit fatigue.

For more information, [please visit our website](#).



— ZDHC's vision



Our Mission

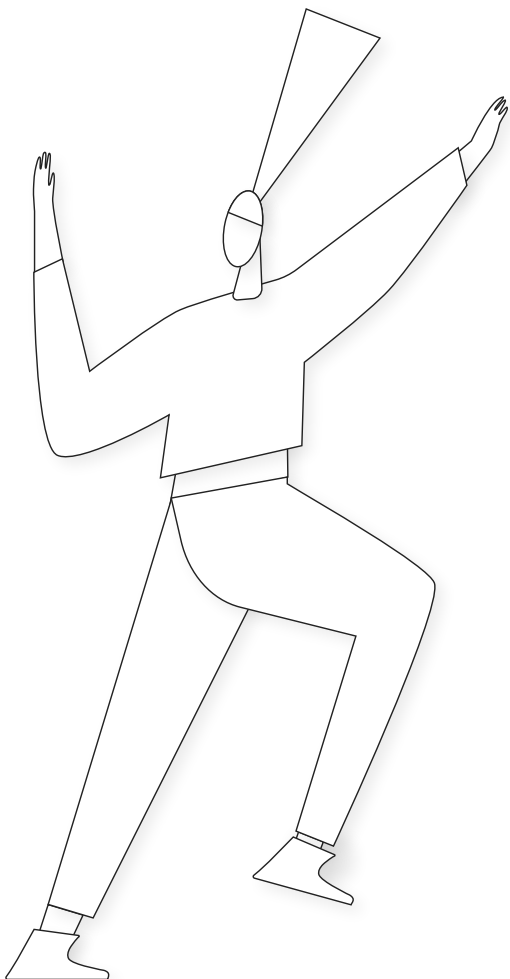
Our Mission is to lead our global value chains to achieve the highest standards for sustainable chemical management, driving resource efficiency and circularity.



Our Vision

Our Vision is a world in which better chemistry leads to the protection of life, land, air and water

Our 2030 goal is:



100%

of chemical formulations used in the ZDHC Community*

and _____

70%

of chemical formulations used in the global industry**
(will) conform*** to the ZDHC MRSL.

For more information, [please visit our website.](#)

*ZDHC Community if joined before 31 Dec 2027

**Global industry assumptions made based on the OAR's OS list

***Conform = in the ZDHC Gateway



— The ZDHC Roadmap to Zero Programme

Joint implementation - from collaborative engagement to collective impact

ZDHC is a multi-stakeholder collaboration-based initiative with a Committed Community of more than 350 ZDHC Signatories. The ZDHC Roadmap to Zero Programme provides a clear path to accelerate the implementation of sustainable chemical management by:

1. Creating aligned, industry-endorsed guidelines, platforms and solutions for sustainable chemical management.
2. Driving effective implementation of these guidelines on the ground.
3. Engaging a network of relevant stakeholders to empower every point of the supply chain to manufacture safer products.

We guide value chains towards the use of safer chemistry - for a cleaner planet - and a brighter future

We have formulated our strategy and implementation methods for brands, suppliers and other stakeholders to phase out the intentional use and disposal of hazardous chemicals from the global fashion value chain in close consultation with the ZDHC community.

Through collaboration and coordination, brands have been empowered to implement a uniform, system-based approach towards sustainable chemical management. Together with them, we are leading a paradigm shift in the industry.

ZDHC's critical achievement through the Brands to Zero and Roadmap to Zero Programme has been transformative in the way in which chemistry is managed and monitored. We are moving the industry away from a reactive system that focuses on products, using RSL (Restricted Substances List) testing, and instead moving it towards a holistic system which proactively manages input chemistry with the use of the ZDHC MRSL (Manufacturing Restricted Substances List) conformance testing. Accordingly, our collective aim remains to prevent harmful chemicals entering the global value chain in the first place.



— Our Impact in 2024

We are proud of the progress we have made in improving production conditions across the globe. Below we report on our impact over 2024:

- Held over **150 events** across five global regions, reaching more than **17000 participants** in **10 languages**.
- ZDHC community grew to over **350 Signatories** including 57 signatory brands, 59 chemical formulators and 45 suppliers.
- **100%** of ZDHC Signatory Brands are committed to adopting the ZDHC MRSL.
- Verified safer chemical products on the ZDHC Gateway increased by **31.6%** from 2023 to 2024.
- More than **70% of suppliers** met all ZDHC MRSL wastewater requirements in both 2024 testing cycles.
- Issued **2700 ZDHC Academy certificates** and delivered **238 trainings** through 30 Approved Training Providers.
- Supplier registrations rose by **49%**, from 8721 in 2022 to **12972** in 2024.
- Launched a dedicated **Gender and Chemicals Workplan (2025–2027)** to address gender-specific chemical exposure risks.

For more information, [please visit our website](#).

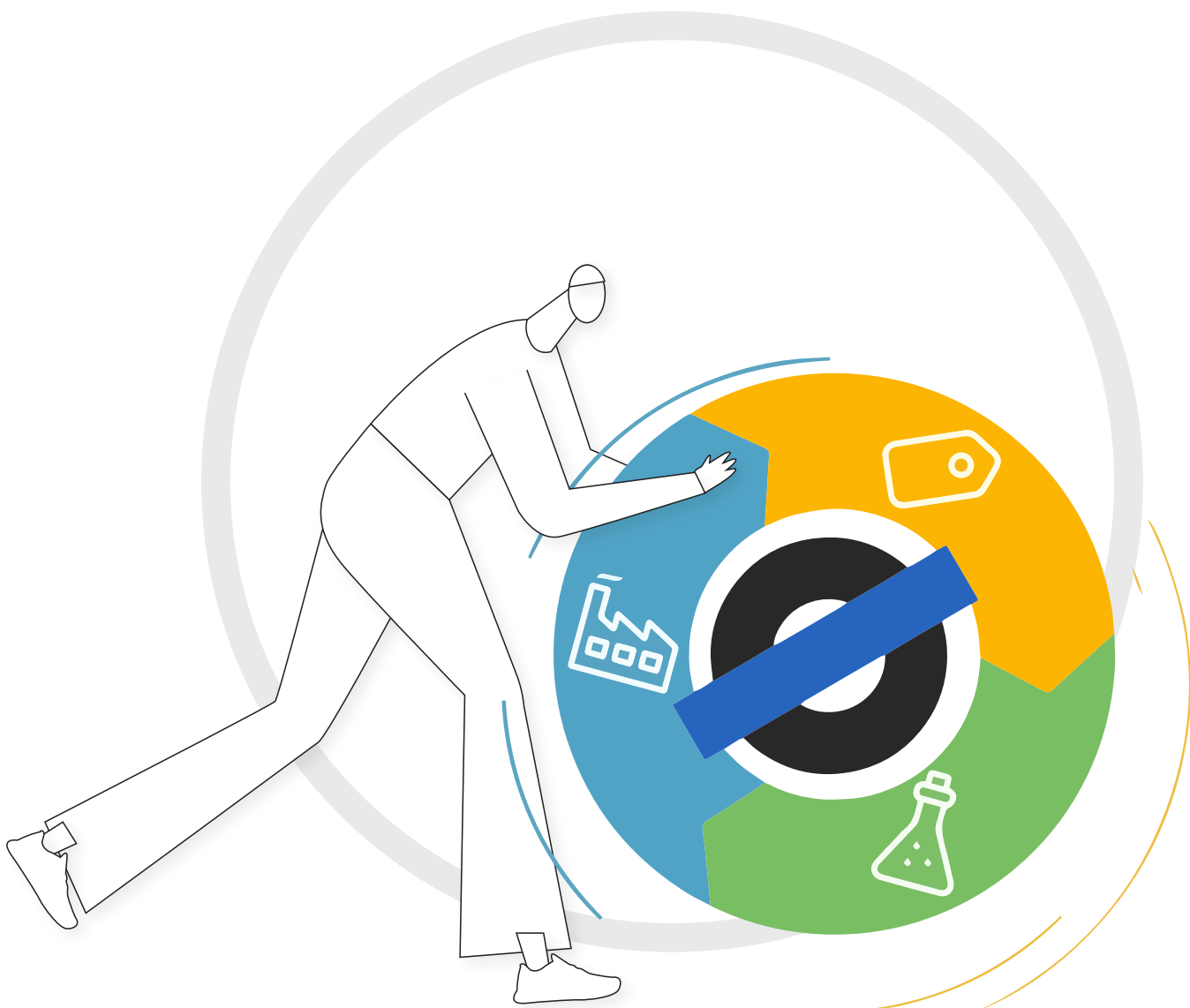


SECTION 2

The Brands to Zero Programme & 2025 Report



**The Leader Programmes
work as a flywheel
towards zero discharge of
hazardous chemicals.**

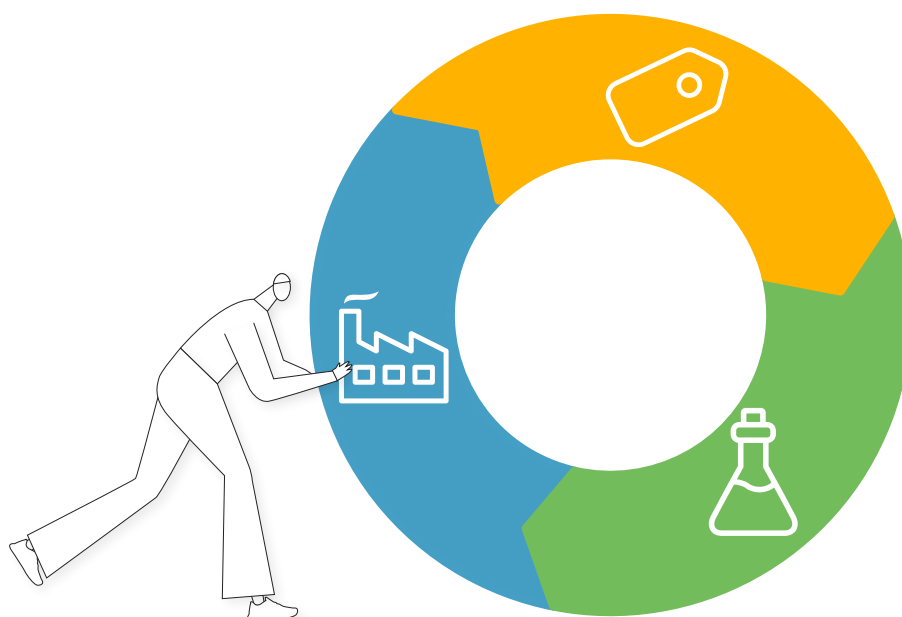




— ZDHC Leaders to Zero Programmes

To accelerate industry wide convergence on ZDHC guidelines, platforms and solutions, and the scaling of ZDHC's positive impact, we have initiated three leader programmes: Brands to Zero, Supplier to Zero and our forthcoming Formulators to Zero.

Leaders to Zero: ZDHC Leader Programmes form a flywheel to create a culture of change.



At ZDHC, we compare the energy of the growing interaction between brands, suppliers and ultimately chemical suppliers created by our Leaders to Zero Programmes, to a flywheel. It is vital part of the solution to the epic challenge of eliminating harmful substances from the entire fashion supply chain:

When **brands** demand better chemistry for their products, suppliers meet these requirements (verified through InCheck Reports) which in turn accelerates their implementation of the Roadmap to Zero Programme. Success and progress is acknowledged in Brands to Zero.

Suppliers that implement and meet brands' requirements and position themselves as a sustainable facility will naturally gain more business. This will incentivise a 'race to the top' in which providing and using better chemistry will be a competitive advantage in the marketplace.

As **chemical formulators** strive towards the challenges set by brands and suppliers, they will lead the change by increasing their investment in the vital R&D required to replace those chemical substances listed on the ZDHC MRSL Candidate List. Serving this need for their customers will drive the positive change the industry needs to improve sustainable chemicals management practices.



— The Brands to Zero Programme

The Brands to Zero Programme (BtZ) provides Brands and Retailers with a **harmonised** approach and a clear path to achieving sustainable chemical management in their own corporations and throughout their supply chains.

Alongside this guiding character, the Brands to Zero allows brands to measure and benchmark their implementation progress, and celebrate their role in ZDHC's successes. It is built upon the principles of the OECD Due Diligence Guidance for our industry and enables the ZDHC community to strive for greater joint impact.

Joint implementation

The Brands to Zero Programme marks cornerstones and milestones for the implementation of ZDHC Guidelines, Platforms and Solutions that streamline and create a clear common implementation corridor. This eliminates **duplicative efforts** and supply chain complexity resulting in enhanced supplier engagement and consistent benchmarking of implementation performance.

Implementation leadership

In order to measure the overall impact of ZDHC's efforts it is important to align **implementation** principles and make respective ambitions and achievements comparable. The Brands to Zero Programme makes this possible by providing a consistent and quantifiable assessment. It thereby helps to drive implementation and improvement of ZDHC by providing individual roadmap development plans.

**“ZDHC Guidelines,
Platforms and
Solutions streamline
and create a single
common
implementation
approach”**

Supporting you to communicate your impact and progress

The Brands to Zero Programme allows Brands and Retailers to concentrate on their engagement with their supply chain. Furthermore, it allows brands to communicate to their own organisation their work and progress in being part of ZDHC's mission to phase out the use of hazardous chemistry.

A report is produced by a third-party assessor (KPMG) for each brand to provide key information on their level of implementation. Each report is based on defined KPIs and metrics.

Overall, this approach **streamlines** the implementation of ZDHC Guidelines, Platforms and Solutions by bringing these individual approaches together. The key is collaboration and reporting. Because if it is not measurable, it is not a joint effort.



— Brands to Zero: Assessment and Scoring

An annual assessment process evaluates the progress of each brand

ZDHC Signatory Brands commit to sustainable chemical management via the Brands to Zero (BtZ) Programme.

Annual third-party assessment evaluates progress using ZDHC guidelines and KPIs.

Brands are rated as Pioneer, Accelerator, or Champion based on performance.

Assessment enables benchmarking, accountability, and continuous improvement.

Post-assessment support helps brands close gaps and advance in the Roadmap to Zero.

The BtZ framework is updated yearly to raise the bar for environmental impact.

ZDHC Signatory Brands are committed to the ZDHC Roadmap to Zero Programme and its implementation. The Brands to Zero Programme provides ZDHC Signatory Brands and Retailers ("Brands") with a sustainable chemical management approach in a clear, harmonised pathway with the goal of transforming collaborative implementation into collective chemical and environmental impact. All ZDHC Signatory Brands are subject to an annual assessment process which evaluates Brands' efforts in implementing the RtZ Programme, enabling brands to demonstrate their progress. It focuses on the implementation of the ZDHC guidelines and use of ZDHC platforms and solutions, holding brands accountable for implementing their commitment to driving a common industry approach. Each brand's progress is evaluated against ZDHC-set key performance indicators (KPIs). The objective of the assessment is to harmonise the implementation of the ZDHC Roadmap to Zero Programme, supporting improvement by measuring and benchmarking brand's implementation performance.

The assessment is reviewed by a third-party Brands to Zero Assessor, resulting in a report that allows brands to benchmark their efforts against their peers and discuss strategic development with their internal leadership. One of three performance levels can be awarded based on the assessment results: Pioneer, Accelerator or Champion. After the annual BtZ assessment, brands may consult with the ZDHC

team on the gaps identified, with the aim to identify improvement actions and the next steps to progress further in RtZ Programme implementation.

Results are based on defined KPIs and metrics. This enables a quantitative, point-based evaluation of a brand's efforts to implement best chemical management practices on a corporate and supply chain level, and its success in aligning with ZDHC guidelines. Critical KPIs further determine if a brand reaches Pioneer, Accelerator or Champion Level; this is in addition to point-based benchmarks, which are in place to inspire continuous improvement. Most of the assessment's KPIs provide a pathway for RtZ Programme implementation and improvement and allow brands to define the speed and ambition of implementation according to internal capacities and capabilities. That said, there are essential KPIs which are required to demonstrate commitment to the ZDHC guidelines. Failing to meet expectations on these KPIs (e.g. commitment to the ZDHC MRSL) will lead to a negative score and not meeting the Pioneer Level.

The Brands to Zero Assessment is reviewed and updated annually, with the aim of continuously improving KPIs, level criteria and the assessment process.

Discover more about the [BtZ Assessment](#) and the [BtZ assessment principles](#).



The Brands to Zero 'Assessment Questionnaire' is structured into four segments. These are:



Context Questions

Context Questions help the assessors understand both the scope of the Brands to Zero assessment, and the way in which the brand approaches the respective topics. This will subsequently influence the KPIs, and the Brands to Zero scoring.



Calculation Model

The Calculation Model Segment quantitative assessment determines the coverage of ZDHC implementation at the supply chain level. This segment has been revised to enable a high-level comparison in brands' supply chain implementation approaches. The Calculation Model is directly linked to Monitoring Questions of the Corporate Level and the Supply Chain Performance Segment.



Corporate Level

The Corporate Level Segment evaluates the brand's performance with regards to relevant commitments made, setting them into practices and supply chain engagement. Based on the OECD Guidance, goals and strategies set, implementation plans, enabled staff and responsible business practices or decision making are evaluated here, as well as standard operating procedures.



Supply Chain Performance

The Supply Chain Performance Segment focuses on the brand's general approach to each of the ZDHC's guidelines, platforms and solutions. KPIs offer implementation pathways to reduce duplicative efforts and confusion in the supply chain, as they offer options according to the brand's ambitions and abilities.

This segment deals with the brands' adoption practices, and how they monitor the implementation scale of ZDHC in their supply chain. Furthermore, this segment evaluates the follow-up and corrective action practices that brands have in place if the suppliers do not meet the expectations.





Brands to Zero Segments

1. Context Questions

Context Questions do not impact the actual Brands to Zero scoring. The information gathered is used by the assessors to better understand the scope of the annual Brands to Zero assessment and how the brand approaches the broader topics that impact the KPIs which impact the Brands to Zero scoring. Answers to the context questions are displayed in the Assessor's Final Report.

Scoring: No scoring

2. Calculation Model

The Calculation Model informs the basis for assessing the brand's efforts in implementing ZDHC guidelines, platforms and solutions in its supply chains. Brands are required to provide sufficient data and supporting evidence to enable the assessors to evaluate the following quantitative KPIs in the Corporate Level and Supply Chain Performance level segments. The Calculation Model is directly linked to Monitoring Questions within those segments, where coverage of ZDHC implementation at the supply chain level is determined.

ZDHC expects brands to have set implementation goals or targets in accordance with ZDHC guidelines, platforms and solutions also expects brands to set up the monitoring systems and standard operating procedures (SOP) necessary to either understand the state of implementation or measure their success. The Brands to Zero assessment itself doesn't differentiate between the types of brands and retailers that are ZDHC Signatories - but in the benchmarking this is illustrated by the brand's applicable category. Therefore, to ensure the Brands to Zero produces an objective report of a brand's scale of implementation, the Calculation Model follows a sequential approach to breaking down a brand's internal calculation method so that it can be assessed objectively.

The Calculation model is designed to:

1. Confirm Product Portfolio and Scope
2. Confirm Implementation Scope and Approach
3. Outline brand's internal Calculation Model
4. Translate into numbers of supplier facilities or business volume

Scoring: No directly attached scores. Directly impacting scores in Corporate Levels and Supply Chain Performance Segment.

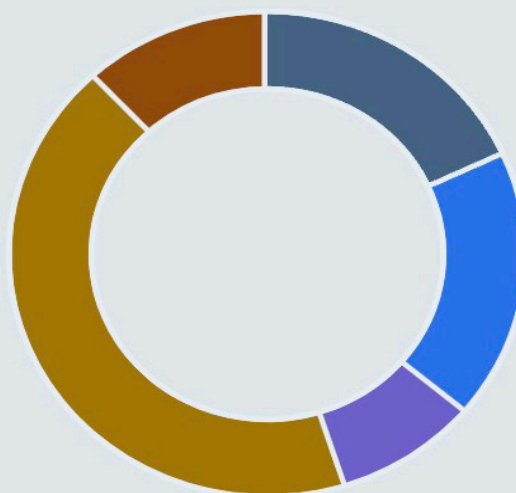
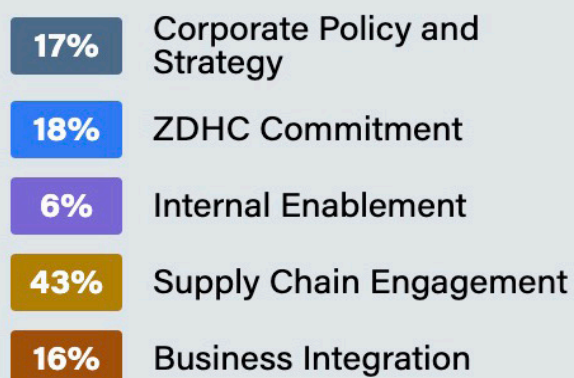


KPIs, Metrics & Scoring: High-level overview

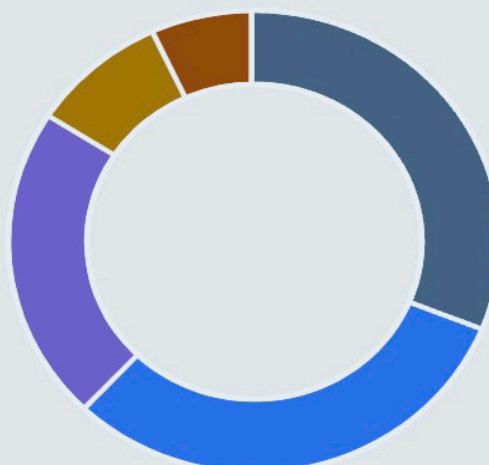
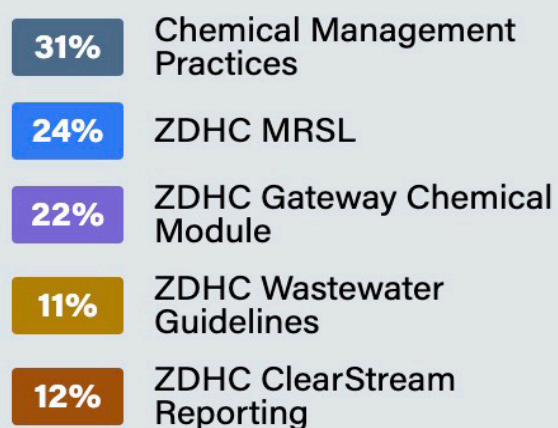
In the Brands to Zero Programme, the performance on each KPI is assessed by points. The assessment is divided into four segments. Two of the four segments impact scoring directly: the Corporate Level Segment, in which you can reach 251 points, and Supply Chain Performance Segment, in which brands can attain 360 points. Each segment consists of multiple performance areas. The information below explains the degree to which each element is weighted.

Performance Areas contributing to the overall score

Corporate Level segment:



Supply Chain Performance Level segment:





— Updates from 2025 Assessment

Brands to Zero assessment process

The Brands to Zero assessment is annually reviewed and updated, aiming to continuously improve KPIs, levels criteria and the assessment process.

Shortly after the Brands to Zero (BtZ) reports are published, the ZDHC team engages with the Assessors, the individual brands and the Brand Advisory Group to reflect on the past assessment for the purpose of improvements of KPI phrasing and guidance on interpretation and evidence provided. Further, ZDHC guidelines, platforms and solutions launched in the first half of 2024 are taken into consideration for defining respective new or updated Brands to Zero KPIs. Criteria for achieving the different Brands to Zero Levels are also annually reviewed in order to continue to drive joint implementation within the industry. To this purpose, both RtZ Programme developments and industry progress are taken into account.

A Brand Advisory Group Sub-Group is formed to discuss and advise on changes to the Brands to Zero KPIs, the Brands to Zero Guidance or the Brands to Zero Platform.

Based on the consultation process illustrated above, amendments were made to the Brands to Zero assessment. The main ones are described in the following chapter.

MRSL conformance-related KPIs

In line with the ZDHC 2030 Strategy, Brands to Zero aims to accelerate progress towards ZDHC MRSL Sustainable Chemical Management (SCM) Framework Excellence.

Brands' monitoring efforts play a crucial role in supporting solution adoption and supply chain performance progress. In addition, verification enables credibility and trust in a supplier's chemical inventory and Performance InCheck reports. Therefore, in 2025 KPIs related to MRSL conformance monitoring and verification continued to be reinforced through:

- Strengthened and dedicated focus on Brands' approaches to monitoring and verifying conformance with the MRSL
- Further integration of the ZDHC Verified InCheck Solution and introduction of an additional KPIs on Supply Chain Performance achievements
- Strengthened KPIs on Supply Chain Performance achievements on average MRSL conformance achieved in the Brand supply chain

This also results in an increased weight of the ZDHC MRSL performance area on the overall assessment score. In addition, following the evaluation of Signatory Brands and supply chain progresses achieved in 2023, the MRSL conformance-related criteria for achieving Accelerator and Champion levels were also refined.

The updated criteria further challenge brands to drive ZDHC RtZ Programme implementation across the value chain and to enable the adoption of ZDHC-associated solutions.



— Recognition and visibility

In the Brands to Zero (BtZ) Programme, recognition of brand efforts and level achievement is not a destination, it's a milestone on a shared path towards transformation. The BtZ Levels: Pioneer, Accelerator, and Champion, represent progressive stages in a brand's journey to embed sustainable chemical management across its corporate framework, its operations and supply chain. They are not endpoints, but markers of evolving leadership and growing impact.

At the highest level, Champion Brands are recognised as impact leaders, organisations that turn commitment into action and targets into measurable results. These brands are committed to implementing ZDHC guidelines across their global supply chains by actively using ZDHC platforms and solutions. They go beyond commitment by translating ambition into action and by integrating sustainable chemical management directly into their business strategy and purchasing practices.

Recognition as a Champion is not the finish line — it's a commitment to keep leading.

The BtZ framework is reviewed and elevated annually, with updated KPIs and criteria that continuously raise the bar for sustainable chemical management excellence. Even Champions are expected to evolve, adapt, and improve. This dynamic approach ensures that the BtZ programme stays relevant, credible, and aligned with the industry's shifting challenges.

In this way, Champion Brands are not only recognised for what they've achieved, but they are expected to continue to lead by example, guide their peers, and shape the future of sustainable fashion.

Recognition is also made visible and transparent through the ZDHC Fashion Radar, where brands' BtZ levels and progress are published for all stakeholders to see — reinforcing trust, accountability, and industry leadership.

To find out more, visit <https://www.roadmaptozero.com/brands-to-zero>.

The ZDHC Detox Fashion Radar boosts visibility into sustainable chemical management across the fashion industry. It maps brands based on their engagement with ZDHC programmes—from the core - Champions to outer-ring peers using other tools whilst tracking their progress over time.

To find out more, visit <https://detoxfashionradar.roadmaptozero.com>.

The Brands to Zero Programme isn't just about where you stand today — it's about how far you're willing to go.

Brand Leaderboard



As part of Brands to Zero, brands and retailers harmonise expectations towards suppliers and remove obstacles to allow responsible chemical management to thrive throughout their value chains. While all ZDHC Signatory Brands are recognised for their leadership within the industry, ZDHC measures and benchmarks the implementation performance within the Brands to Zero.

We are pleased to announce that these brands have achieved the 'Champion Level' in the ZDHC Brands to Zero Assessment 2025* by accelerating their implementation of sustainable chemical management across their value chain.

By committing to sustainable chemical management, embracing the implementation of sustainability throughout their corporate cultures, and actively monitoring goals and results, the following brands stood out as best practices and performance leaders committed to detoxing the fashion industry.

*The reporting period of the Brands to Zero Assessment is defined as the previous calendar year. Therefore, the 2025 assessment focuses on implementation efforts of the reporting year 2024.

Brands to Zero Assessment Champion Level 2025





The Road Ahead

When you read the 2025 Brands to Zero report, it will be time for reflection for you and your leadership. Those who reached the Champion Level will aim to remain on top, everyone will review strategies and implementation plans to move up a bit and a growing number of newcomer Signatories and Friends will continue to lay the groundwork for future success.

Brands to Zero is not a static programme! We have always ensured that the critical KPIs reflect the main drivers for our community's success in Roadmap to Zero implementation. The 2030 ZDHC Impact Strategy, evolving tools and the reality of supply and value chain challenges - also the "big- picture-topics" like CSDDD and CSRD. With the support of our third-party assessors KPMG Netherlands we will always see how we can make the system more robust and future-proof to ensure the credibility of our work - and your achievements!

The Brand Roadmap to Zero Programme - the brand-specific perspective of joint implementation of ZDHC Guidelines, is an enabler to master sustainability challenges. These are defined as Impact Areas in our 2030 Strategy or identified along the way. The impact of - or better the leverage of sustainable chemical management on due diligence, biodiversity, circularity, reaching scope 3 GHG goals - a joint roadmap enabling the community to upgrade the industry.

Our community - the Brand Advisory Group, working with Friend Brands and Vendors on peer learning and implementation challenges or the exchange with Signatory companies and representatives from other sectors will be in the focus of the upcoming months. The industry is facing challenging times, hence, we believe we can master the challenges together, in tight collaboration and by aligning individual efforts.

We appreciate the trust you put in the ZDHC team and your continuous support and commitment!

Sincerely,
Klaas Nuttbohm
The ZDHC Foundation

For more information, please visit:

- ▷ [Roadmap to Zero Programme](#)
- ▷ [Brands to Zero Programme](#)
- ▷ [Detox Fashion Radar](#)



For more information, [please visit our website.](#)

ROADMAP TO **ZERO**

By Ø ZDHC

