



LEED IN MOTION

RETAIL

September 2019



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Starbucks Reserve Roastery - Milan, Italy.

Starbucks is pursuing LEED certification at its Reserve Roasteries in Milan, Shanghai, and Tokyo. With thousands of people visiting these Roasteries each day, various design and construction challenges had to be overcome to reach the sustainability targets such as increased fresh air supply and heavy filtration to keep both carbon dioxide and PM2.5 levels low.

Photo Credit:
Starbucks Corporation

Learn more about LEED retail projects. Visit usgbc.org/projects

The *LEED in Motion* report series provides a holistic snapshot of the state of green building and LEED, the world's most widely used green building and performance rating system. These industry and topic-specific reports aim to equip readers with the facts, figures and insight they need to build a strong case for sustainability.

LEED in Motion: Retail examines how LEED-certified stores, banks, restaurants and other retail locations enhance communities, benefit businesses and their employees and create a healthier, more comfortable customer experience.

This report shares the stories of LEEDers who are leading the way by taking action.



Responsible Retail For A Better World



Foreword from Mahesh Ramanujam

President and CEO, U.S. Green Building Council
and Green Business Certification Inc.

These days, sustainability is embedded in every part of our daily lives—and the business world and retail sector are no exception. Business leaders are focusing more and more on sustainability to help differentiate their brands, performance and strategies. And, increasingly, companies recognize

that addressing these challenges will require implementing meaningful corporate social responsibility plans and working toward energy efficiency, water savings, increased resilience, reduced emissions and net zero and waste strategies.

Sustainability is no longer “a nice to have.” It has become a core part of how all businesses plan for their future. Be it a shopping mall, mom-and-pop shop, manufacturing facility or distribution warehouse, independent of what their business case says about sustainability, businesses are realizing they must embrace it to innovate. Sustainability represents the largest and simplest opportunity for any business or company to embrace a triple bottom line of people, planet and profit.

Sustainability in the retail industry has increasingly become a hot topic in the past few years. In addition to bottom line impacts, retailers are also realizing that going green offers them important customer advantages. According to a report from the Retail Industry Leaders Association, 93% of global consumers expect more brands they use to support social and environmental issues. Customers are also happy to invest in sustainable retailers. An estimated 68 million adult Americans base their purchasing on their values – personal, social and environmental – and say they will spend up to 20% more on environmentally sound products.

And green building is one of the best ways companies can future proof, support climate action and make an immediate impact. A sustainable business will not only bring a company respect from customers, it can save money and resources in the long run. Sustainability creates innovation, opens new markets, reduces business risks and enhances brand reputation for retailers – all of which build resiliency.

From Fortune 500 companies to small businesses, companies all over the world are using LEED as an essential tool for achieving their sustainability goals and corporate social responsibility plans. And the retail sector is increasingly committing to making a critical impact in their markets by certifying their facilities to LEED.

LEED offers solutions that enable businesses to create sustainable, healthy and high performing buildings and spaces and to improve their overall brand, customer and employee experience. As retail is a fundamental part of any local economy, an improved consumer experience in these spaces also results in a community that thrives by protecting the environment and improving human health.

In the pages that follow, you’ll hear from some of the world’s top retailers – from adidas, to McDonald’s, to 7-Eleven and more – on how they have used LEED certification to engage consumers with their brands and to demonstrate their commitment to addressing social and environmental issues.

These LEED-certified spaces are all around you. As you go about your daily activities, take a moment to look for the LEED plaque in the businesses you frequent. You’ll know that your money is going toward a responsible business that protects the environment and supports its local community.

With gratitude,
Mahesh Ramanujam

A handwritten signature in black ink that reads "Mahesh Ramanujam". The signature is written in a cursive style and is positioned above a solid black horizontal line. Below the line, there are two small black dots.

LEED and Retail

“Without a healthy environment there are no shareholders, no employees, no customers and no business.”

- Yvon Chouinard, founder of Patagonia

The retail sector has seen significant changes over the past two decades. As consumers have migrated to online platforms for everyday and luxury purchases, stores seeking to retain a brick-and-mortar presence are finding new ways to stand out. When retailers incorporate sustainability, they set themselves apart from their peers. LEED is the world’s premier green building project and performance management system. It delivers a comprehensive framework for sustainable design, construction, operation and performance that helps retailers communicate achievement of ESG goals to investors, customers and other stakeholders.

Retail spaces have unique occupancy demands, waste streams, and energy and water use patterns, which warrant a specific LEED offering. With more than 12,500 retail spaces³ worldwide using LEED, it’s clear that green building verification is an important driver of responsible development within the sector.

Today, LEED offers retail certification options for new construction, existing buildings and interiors, giving retailers more solutions than ever. LEED is suitable for retail spaces of all kinds, from restaurants and coffee shops to convenience stores to luxury boutiques.





HEALTH: Employees and customers of LEED-certified retail locations benefit from spaces designed to maximize indoor fresh air and minimize exposure to airborne toxins and pollutants.



SAVINGS: LEED stores can benefit the financial bottom line. On average, the life-cycle savings amounting to 20 percent of total construction costs represents a ten fold payback on the upfront investment.⁴



RESPONSIBILITY: LEED certification sends a powerful message about a company's values and priorities. By using LEED, retailers actively demonstrate to their employees and customers that they care about human health, community resilience and environmental protection.



VALUE: On the whole, LEED-certified retail spaces attract and retain more customers than non-certified comparable spaces and operate with lower overhead costs.⁵

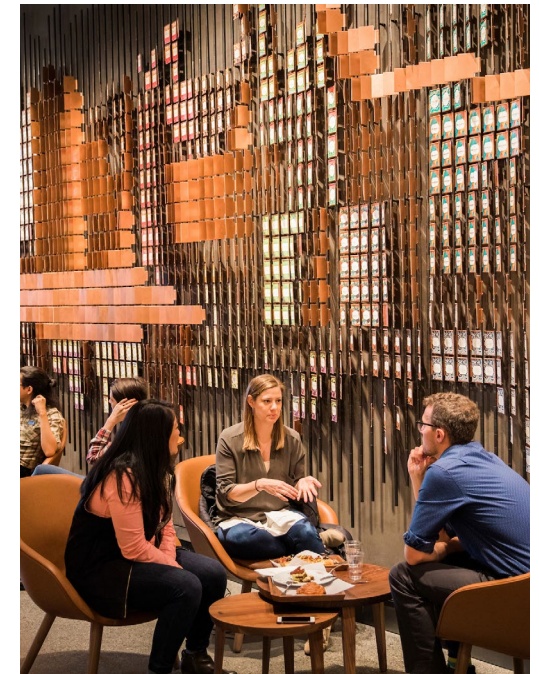


LOYALTY: LEED certification means improved health, daylight and better cognitive capability. These factors send a powerful message about a company's values and improve overall brand experience and increase brand loyalty.

4. "The Cost and Financial Benefits of Green Building," Greg Kats, Capital-E, October 2003
5. "The Relationship Between Corporate Sustainability and Firm Financial Performance," Conlon and Gravas, 2012. <https://pdfs.semanticscholar.org/2dbe/6f88953acfe045746bcb165a8b39e93706be.pdf>

Retailers know that LEED certification benefits the triple bottom line. LEED specifically addresses several aspects of these unique spaces, including:

- Fluctuations in employee and customer occupancy, depending on work shifts and hours of operation
- Differences between front-of-house and back-of-house operations
- Concerns regarding the controllability of systems
- Process energy and water loads
- Different waste streams
- Parking requirements



Learn more about LEED retail projects. Visit usgbc.org/projects

How it Works: Certification

LEED certification for retail includes the following steps:

1. Determine your project type (new or existing building or new or existing interior space) and register
2. Select priorities for your project based on outcomes outlined in the LEED rating system (ex. human health, energy efficiency, carbon reduction, etc.)
3. Review the tools and resources available for LEED projects
4. Document achievement of rating system requirements and credits
5. Submit for review

Third-Party Verification

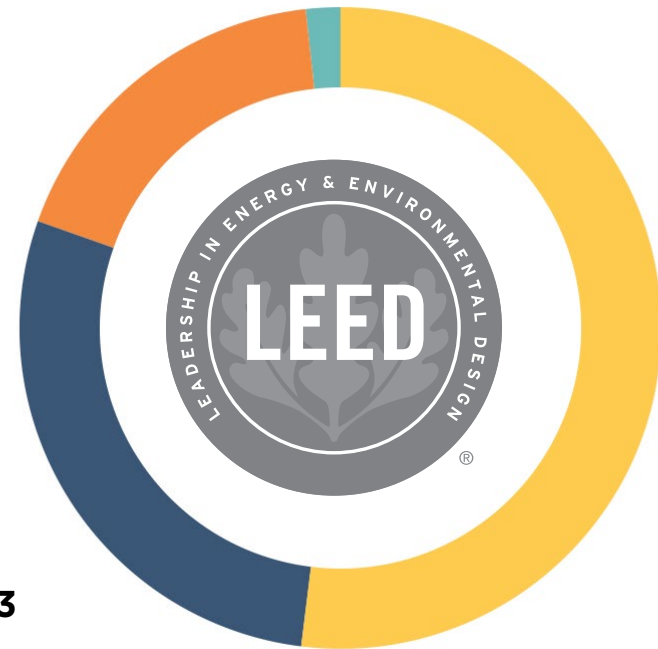
To earn LEED certification, all projects submit documentation for review by Green Business Certification Inc. (GBCI), the premier organization independently recognizing excellence in green industry performance and practice globally. GBCI provides third-party verification services for LEED certification and credentialing through a scientific process to verify that certain criteria for sustainable building are met.

For better buildings, accountability makes a difference. Through a carefully managed, independent, third-party verification system, LEED affirms the integrity of green building commitments by ensuring project teams are delivering on design plans and goals. Third-party validation helps guarantee that each project saves energy, water and other resources, reducing overall environmental impact. No cutting corners.

In the United States alone, retail supports one in four jobs¹, making it the largest private-sector employer and exerting significant force on the national economy. In just the first quarter of 2019, the retail trade in the U.S. was responsible for \$1.9 billion in gross output, amounting to 5% of total gross output across all sectors.²

1. National Retail Federation. <https://nrf.com/retails-impact>. Accessed August 8, 2019.
2. Gross Domestic Product by Industry: First Quarter 2019. <https://www.bea.gov/system/files/2019-07/gdpind119.pdf>
3. USGBC database, as of May 2019.

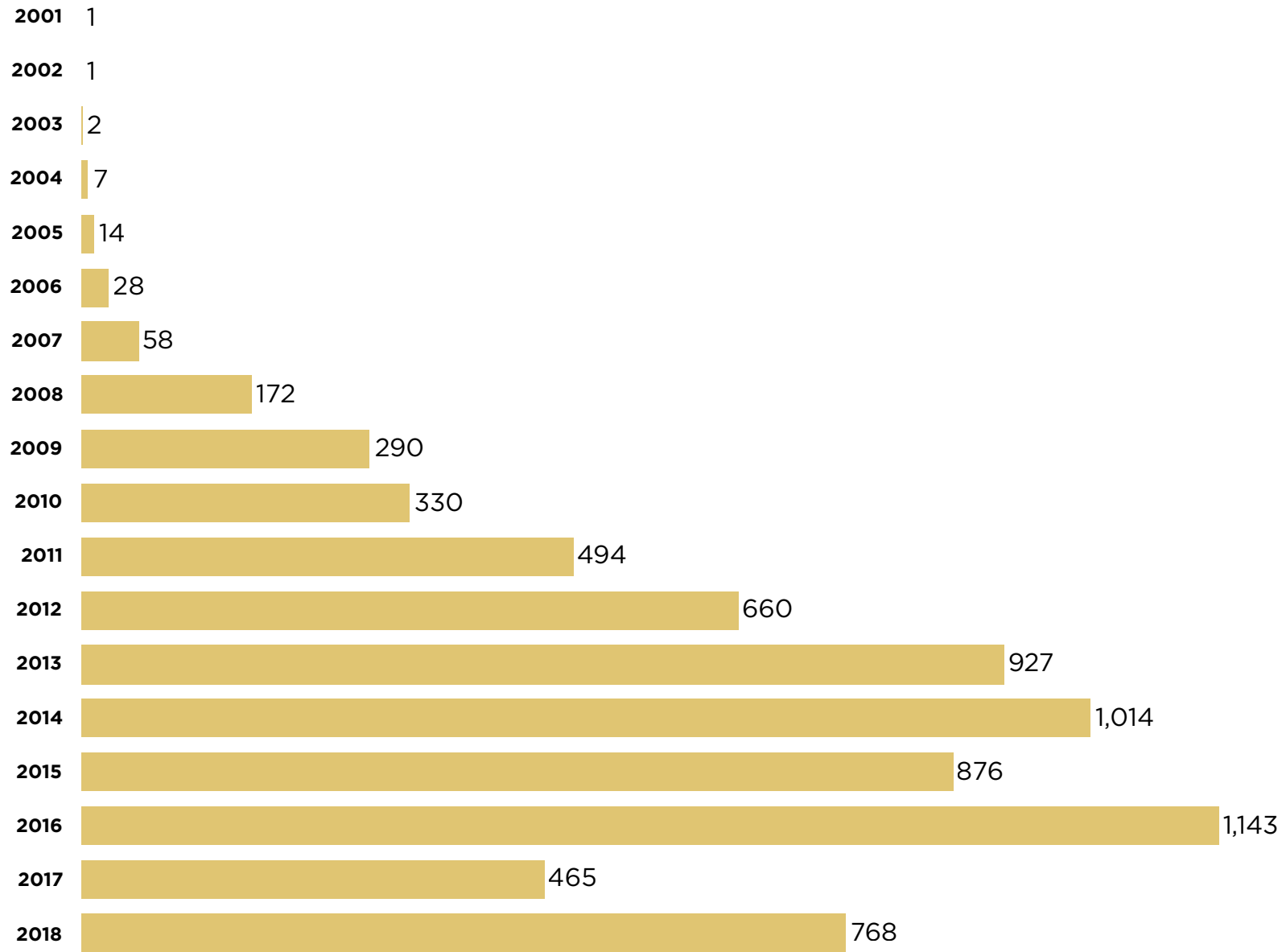
LEED-Certified Retail Projects by Level



- Certified **3,863**
- Silver **2,115**
- Gold **1,328**
- Platinum **159**

As of May 2019

LEED-Certified Retail Projects



Top 10 Countries and Territories

for LEED-Certified Retail Projects

As of May 2019

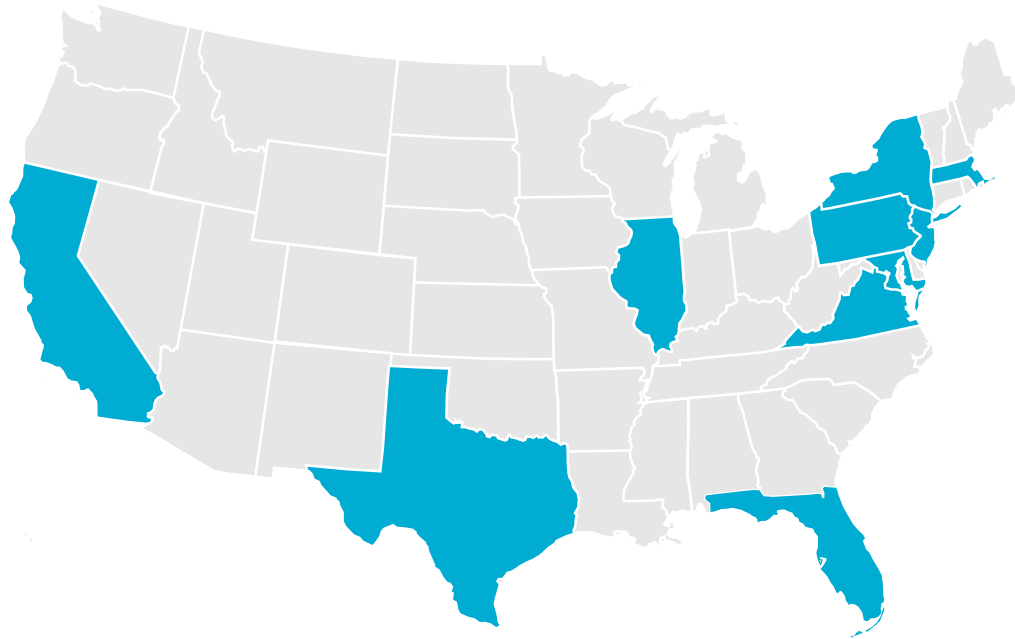
Country/Territory	Projects	GSF
United States	5,862	151,015,738
Canada	604	27,106,534
Mainland China	151	36,267,661
Thailand	70	855,753
Brazil	46	3,510,470
Mexico	43	10,070,765
China, Hong Kong	35	605,145
Colombia	32	21,521,840
India	25	3,028,709
United Arab Emirates	14	3,870,220



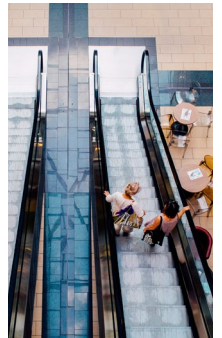
Top 10 U.S. States

for LEED-Certified Retail Projects

As of May 2019



Top 10 States	Projects	GSF
California	962	25,701,139
New York	518	13,137,213
Florida	418	6,794,245
Texas	377	7,695,787
Illinois	286	8,011,922
New Jersey	221	4,843,185
Pennsylvania	211	4,894,186
Maryland	203	5,184,679
Massachusetts	171	4,985,289
Virginia	168	3,802,565



Strategies and Outcomes

Retail can include everything from financial institutions and automotive showrooms to restaurants and coffee shops. LEED has built-in strategies for these unique spaces that enable both consumers and retailers to make positive change through green building practices, education and environmental stewardship.

ENERGY

Retailers can help lower demand for energy in their spaces by employing strategies to reduce usage, designing for efficiency and supplementing the energy supply with renewables.

Optimized Energy Performance substantially reduces energy use within spaces, leading to lower operating and maintenance costs, along with other benefits that reduce environmental harm and greenhouse gas (GHG) emissions.

Advanced Energy Metering supports energy management and identifies opportunities for additional energy savings by tracking building- and system-level energy use.

Tenant-level Energy Performance uses metrics of cost and GHG to calculate marked improvement across all energy sources serving appliances, equipment, display lighting and other features in the space.

Refrigerant Management Systems allows stores with commercial refrigeration systems to reduce ozone depletion while minimizing direct contributions to climate change.

WATER EFFICIENCY

Retail spaces can drastically cut down on water consumption by addressing indoor and process water usage for fixtures and appliances, accounting for unique floor plans and occupancy calculations as well as water metering.

Water Metering supports water efficiency by monitoring and benchmarking water use over time. Individual meters or submeters within retail spaces help owners track usage and promote conservation.

Indoor Water Use Reduction helps businesses save water through high-efficiency fixtures. By establishing a minimum baseline requirement, owners and managers can deploy strategies to achieve water savings.

Appliance and Process Water Use addresses water conservation uses in areas where significant water savings can be employed and recognized.

MATERIALS

Retailers can design spaces that take a whole life-cycle approach to buildings, improving overall performance and promoting resource efficiency. This can be accomplished through strategies that minimize embodied energy and impacts associated with the extraction, processing, transport, maintenance and disposal of building materials.

Building Product Disclosure and Optimization – Environmental Product Declarations encourage the use of products and materials for which life-cycle information is available and that have environmentally, economically and socially preferable life-cycle impact.

Storage and Collection of Recyclables aims to reduce waste that is generated by building occupants, and subsequently hauled to and disposed of in landfills.

Tenant Space Long-term Commitment encourages choices that conserve resources and reduce environmental harm from the production and transport of materials associated with tenants' relocation. Frequent tenant turnover entails major remodeling and replacement of materials before the end of their useful life. Long-term leases and commitments also bring social benefits, such as stronger relationships with service providers in the building and local community.

Low-Emitting Materials reduce concentrations of chemical contaminants that can damage air quality, human health, productivity and the environment.

HUMAN HEALTH AND COMFORT

Retail spaces that prioritize good indoor environmental quality - including air quality and thermal, visual and acoustic comfort - help protect the health and well-being of employees and customers alike.

LOCATION AND SITE

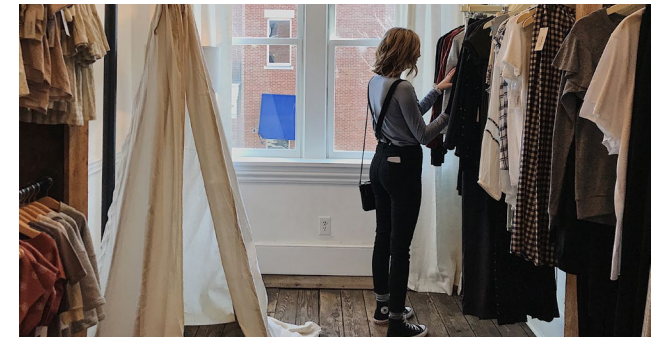
LEED encourages thoughtful decisions about selecting a location and the impact on the surrounding environment. Projects are encouraged to consider compact development, alternative transportation and connection with amenities, as well as the vital relationships between buildings and ecosystems. Retail interiors projects are also rewarded for locating within a LEED-certified building.

Enhanced Indoor Air Quality promotes comfort, well-being and productivity by improving indoor air quality through filtration, increased ventilation, monitoring systems and minimization of indoor pollutants.

Surrounding Density and Diverse Uses encourages development in areas with existing infrastructure and other amenities, thereby promoting walkability, transportation efficiency, physical activity through walking and reduction of vehicle use.

Thermal Comfort works to improve satisfaction with the thermal aspects of a space or building while still supporting energy reduction goals. This includes air temperature, humidity, air movement and more.

High-Quality Interior Lighting improves comfort and productivity by reducing or eliminating distraction, creating visual interest and a sense of place, and supporting occupant interaction and communication.



LEED User Spotlight: adidas

adidas demonstrates a commitment to its employees, investors and consumers and showcases environmental stewardship by setting targets to reduce its environmental footprint. A long-term goal to achieve carbon neutrality in corporate buildings is driven by the Green Company Program, an internal sustainability framework to measure and monitor energy and carbon as well as water and waste reduction.

In late 2018, adidas signed the UN Fashion Industry Charter for Climate Action with many other brands and committed to reducing its carbon footprint further in the coming years. adidas stores will play a significant role in this effort.

For three years, adidas has pursued LEED certification for selected stores within its portfolio with a focus on energy efficiency. adidas also uses internal standards for interior design and construction which mirror key areas of the LEED ID+C program as well as ISO 50001 standards for existing stores to continuously monitor and improve energy performance.

Under the current Green Company 2020 target framework, adidas is committed to using LEED for new key corporate buildings as well as for key own store projects. As of July 2019, adidas operates more than twenty LEED projects globally, the majority under the Interior Design and Construction and Building Design and Construction frameworks. Some of these projects have already been successfully certified while others are still undergoing the certification process. The adidas store in Madrid, Gran Via, was the first to achieve LEED Gold.

The adidas store in Berlin close to Kurfuerstendamm is a highlight as it marks the first adidas retail location to use LEED. The project was awarded LEED Gold. The certification process offered key learnings for the project team and resulted in an approach to standardize LEED credits over multiple projects. Ultimately, the implementation of LEED in the adidas store in Berlin resulted in energy savings of approximately 30 percent, which is one example of how

energy savings can be achieved by using highly efficient lighting and HVAC technologies.

adidas' commitment to build and operate sustainable sites is reflected in their growing portfolio of LEED projects. By 2020, additional adidas projects will be certified in Europe, Asia and the U.S.



Photos copyright Sebastian Wells

Learn more about LEED retail projects. Visit [usgbc.org/projects](https://www.usgbc.org/projects)

LEED User Spotlight: McDonald's China

In 2018, McDonald's China officially announced a sustainability action plan to advance the development of more green restaurants and to set a goal of becoming the largest LEED volume certification user in the Asia-Pacific region. The action plan aims to minimize the environmental impact of each restaurant, to promote energy efficiency and to reduce emissions through attention to location and design, materials and construction, and energy management.

By 2022, McDonald's will open more than 1,800 new green restaurants, meaning over 95 percent of the new store portfolio in China will be eligible for LEED certification using ID+C. As of August 2019, McDonald's China has four certified restaurants with 22 in the pipeline for certification via LEED volume certification.

McDonald's China continuously updates and optimizes their existing restaurants, paying special attention to energy management and reduction, including the use of LED lights as well as efficient air conditioning and kitchen equipment. As of 2019, the average energy consumption in a McDonald's China restaurant is 30% lower than it was in 2013 and the company aims to reduce energy consumption by another 11% by 2022, compared to 2018 levels.

The first restaurant to achieve LEED certification in the McDonald's China portfolio was in the Xiongan New Area. The project achieved LEED Gold in September of 2018. Subsequently, McDonald's China was recognized at Greenbuild China 2019 with an Industry Pioneer award for its work to implement the first LEED volume certification program developed by a company based in China. Additionally, McDonald's China received the "Sustainability Achievement of the Year" award from the Royal Institution of Chartered Surveyors (RICS) in 2019.



Learn more about LEED retail projects. Visit usgbc.org/projects

LEED User Spotlight: TD Bank

In 2008, TD Bank made a commitment to sustainable building practices that would be “as Green as its logo” and set a goal of moving to 100 percent green power (carbon neutral) for all retail and corporate spaces, and to develop Corporate Sustainability policies.

Parallel to these measures, TD was also implementing a major redesign of its retail pipeline which included a mix of both freestanding and inline locations. With a firm understanding of the opportunity to integrate sustainability, TD leveraged the LEED rating system as the backbone for these new projects.

By the end of 2010, LEED guidelines were integrated into TD’s design standards platform, and TD started pursuing LEED certification for all new U.S. stores in 2011, with 12 certifications in the first year. TD opened its 200th store in the U.S. to become LEED-certified in Princeton, New Jersey, in 2018.

TD continues to integrate innovative ideas into its designs that both reduce energy consumption and save on operational costs. One unique design solution, driven directly by LEED, started as a challenge: How can TD integrate the use of renewable energy on small sites and buildings?

Since most of TD’s stand-alone bank designs include drive-thrus, the solution was to leverage the drive-thru canopy space for solar PV panels. TD then took it a step further by using the PVs as the canopy itself. Utilizing these bi-facial PV panels not only provides weather protection and reduces construction costs, but is also a great educational opportunity for customers as they drive underneath and see signage that encourages them to “Look Up!” Now that’s innovative!

TD’s continuing focus on expanding the number of LEED-certified stores reflects its commitment to a more vibrant planet with green buildings and operations that conserve energy and natural resources to reduce its carbon footprint in the communities it serves.

- 266 total LEED-certified spaces (both retail and corporate)
- 1st retail bank in the world to achieve both WELL and LEED Gold certification (Bethesda, MD)
- 4 WELL/LEED-certified projects in North America
- Sole financial institution recognized in 2018 by the Institute for Market Transformation for being a Green Lease Leader
- 2018 USGBC NJ LEED Project of the Year, Interiors (Princeton, NJ)
- Ranks in the top 100 as part of the EPA’s Green Power Partnership
- Opened the first net zero bank in 2011, which continues to operate as net zero (Fort Lauderdale, FL)



Learn more about LEED retail projects. Visit [usgbc.org/projects](https://www.usgbc.org/projects)

LEED Project Spotlight: 7-Eleven

7-Eleven 001 Tecnológico | Monterrey, Nuevo Leon, Mexico | LEED Platinum | Certified April 2019

This new building is located in the corner between Av. Eugenio Garza Sada and Av. Del Estado, in the city of Monterrey, Nuevo Leon. It is the first convenience store in Mexico to achieve LEED Platinum and the third in Latin America.

7-Eleven Mexico is a member of USGBC and already has two LEED-certified stores in Monterrey, Nuevo Leon:

- 7-Eleven Las Musas (LEED Silver)
- 7-Eleven UDEM (LEED Gold)

During the design process, 7-Eleven analyzed energy, water, waste minimization and natural lighting. The results of their analyses were used when making design decisions, promoting a positive impact and maintaining the needs of the project while allowing them to achieve the following goals:

- Promoting the use of alternative transportation, like carpools or green cars.
- Reducing water usage by 39% in comparison to an average building using efficient water equipment.
- Reducing heat transmission without compromising natural light intake by using glass containing a layer specifically designed to filter solar radiation (Solarban 90).
- Generating 38.6% of the building's energy via 88 onsite solar panels.
- Ensuring that 100% of the wood used in the project is certified from sustainable forests.
- Reducing heat transfer and air conditioning usage by deploying roof waterproofing that reflects 95% of the sun's rays.
- Using condensed water from the air conditioning system and rainwater stored in a cistern to water all onsite landscaping.

- Utilizing regional plants in the landscaping to reduce the need for watering.
- Ensuring optimal air quality and working conditions by using only low-VOC paints, adhesives and sealants.
- Improving the site's permeability, allowing stormwater to penetrate the ground, helping to restore aquifers.
- Reducing the overall impact of construction by building on a previously-used site.

This project not only demonstrates that sustainability can be applied to commercial buildings, but also demonstrates sustainability leadership and shows that it is feasible for all building types. 7-Eleven Mexico has worked to set an example through comprehensive projects that contemplate the possibilities that currently exist to transform conventional practices into better alternatives.



Learn more about LEED retail projects. Visit [usgbc.org/projects](https://www.usgbc.org/projects)

LEED Project Spotlight: UŠĆE Mall

UŠĆE Shopping Mall | Belgrade, Serbia | LEED Certified | Certified May 2014

The centrally located UŠĆE Shopping Mall in Belgrade, Serbia, welcomes 30,000 people through its doors every day. It is a unique project that required extensive stakeholder and tenant buy-in to meet its energy reduction and sustainability goals. UŠĆE is the third project to achieve LEED certification in Serbia and the first project to certify for operations and maintenance in existing buildings.

The mall straddles old and new Belgrade and comprises more than 100 tenants – all paying for their own square feet of space – who needed to be convinced that pursuing LEED was a good financial investment for them. One key solution? Free energy consultations.

“No one had performed the math for them,” says Marija Golubovic, a LEED AP and a key consultant on the project. “Tenants don’t immediately see the direct interest or likely long-term benefits to pursuing green building certification. Yet, when you do these free energy audits for them, we can credibly say, ‘If you change and invest money here, you will in ten months regain the money over here.’”

As part of the free consultation, each tenant receives the energy status of their space to better understand their energy consumption and how it affects their operations spending. They also learn how to make improvements and further decrease overhead costs. Through the process, UŠĆE’s tenants also learned about the positive health and social impacts a green building can have on their employees and customers.

Many locals view the UŠĆE as more than a place for shopping, but also as a gathering space for socializing and taking appointments. It’s become a de facto community center, with many flocking to the mall because of the high air quality inside.

“People in Belgrade complain about the poor air quality,” says Golubovic. “We wanted them to sense the difference immediately in this building. We monitor fresh air. It’s all filtered. The tenants can now sense the difference.”

The project took two years to complete and Golubovic, her team and the facility management team proudly boast that they are all “LEED addicts” now. In their eyes, the rating system provides a framework to verify how the building is behaving.



Learn more about LEED retail projects. Visit usgbc.org/projects

LEED Professional Spotlight

Alessandro Bisagni | LEED AP BD+C, WELL AP & Faculty, RESET AP, LBC Ambassador | Founder & President, BEE Incorporations

BEE Incorporations is a LEED consultancy behind global luxury retail brands, with projects ranging from luxury showrooms to food and beverage.



Why do luxury retailers choose LEED to certify their locations?

Luxury retail brands have increased their demand for LEED to apply standardized and consistent sustainable practices to greener design, construction, and operations across their entire portfolio: from retail showrooms to their corporate headquarters. Our retail clients understand all aspects of sustainable product delivery and this includes their offices and stores. LEED provides a proven and recognized standard that helps to

effectively assess the impact from construction materials to daily operations to help benefit the health and well-being of their employees and clients.

What are some of the most exciting or impactful green building, retail-related projects that you've worked on?

Supporting our clients to achieve the first LEED v4 Platinum stores in the UK, Japan, and Monaco significantly promoted the capability for certifications in these regions. More recently we were able to achieve LEED Gold for the first LEED v4.1 O+M Interiors store in the world, which highlights the potential for this newest version of the rating system in the retail sector. BEE has over 200 retail projects either certified or under review across 25 countries, covering more than 30 global brands; from luxury retail, mass retail, to food and beverage sectors. We see the determination of brands to improve the sustainability of their real estate footprint is significantly, and consistently, increasing.

What are some recommendations you would give to retailers applying LEED?

Smart indoor air quality (IAQ) and energy monitoring solutions, such as QLEAR, have enabled retailers to track in real-time the performance of their stores around the world. Not only do monitoring solutions help obtain crucial added points under v4/v4.1, but they also enable retailers to use that data internally to benchmark their performance and improve over time. QLEAR specifically is the first cloud platform to integrate directly with Arc - thus facilitating ongoing reporting and potential O+M certification in the future.



Ferragamo Canton Road Store - Kowloon, Hong Kong. Ferragamo's 6,110-square foot retail store is located at the heart of Hong Kong's shopping district and achieved LEED Gold; one of the brand's many LEED projects around the world. (Photo credit: Salvatore Ferragamo S.p.A)

A Vision for the Future

The time has come to do more with less. As the consumption habits of the developed world begin to overwhelm our planet and impact the entire globe, we have a responsibility to devise solutions and utilize our resources responsibly.

There is a correlation between our consumption and natural challenges. A rapidly growing global population and our collective consumption is stressing the planet beyond its capacity. This starts on the individual level. It starts with the things we do every day – where we shop, eat and do business. There is hope for the future if we choose to spend wisely and to support businesses embracing responsible, resource-efficient practices.

