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From Timber to Luxury: A Brand Analysis of Kering's Sustainability, Innovation and Competitive Positioning in the Luxury Market

Introduction

Luxury conglomerates, owning multiple brands for operational efficiency, dominate the luxury market (Lewis, Kim and Ozturk, 2025:3). Kering demonstrates this through mergers and acquisitions (M&A) - a strategic response to competitive pressures and the need for scale (Lewis, Kim and Ozturk, 2025:6). Guided by Environmental, Social, and Governance (ESG) principles, Kering aligns operations with social and environmental stewardship (Lewis, Kim and Ozturk, 2025:11). This paper analyzes Kering's development, communication, and competitive positioning using SWOT analysis and semiotics, including cultural codes - shared societal conventions shaping consumer brand symbol interpretation (Oswald, 2012:53) - to differentiate it from competitors like LVMH. It also examines Kering's competitive advantage - offering superior value over competitors (Doyle and Stern, 2006:19) - and proposes a future strategy.

The Brand - Kering Group

In the 20th century, luxury brands started merging into powerful conglomerates (Lewis, Kim, and Ozturk, 2025: 3). François Pinault established the Kering Group, formerly known as PPR (Pinault-Printemps-Redoute), as a timber trading business in 1963 (Kering, 2025a). After diversifying into retail in 1990, it turned its attention to luxury in 1999, acquiring a 42% share in the Gucci Group (Kering, 2025a). Major companies like YSL, Boucheron, Balenciaga, and Alexander McQueen were acquired following this strategic manoeuvre. By 2025, the portfolio included 13 brands, with Kering Eyewear and Kering Beauté as sub-brands (Kering, 2025a). François Pinault's son became CEO in 2013 and rebranded PPR to Kering (Fernandes, 2019:6), implementing a new visual identity represented by a new logo - "an owl, a symbol of wisdom, protection, and foresight - and a signature that conveys its approach: Empowering Imagination" (Kering, 2025c). By combining luxury brands for resource sharing, strategic alignment, and a cohesive market presence, Kering has historically evolved from a timber trader to a global leader in luxury. This evolution aligns with broader trends of luxury conglomeration, which Lewis, Kim, and Ozturk (2025:3) characterize as crucial for brands' worldwide reach and operational effectiveness, seeking strength through M&A and conglomerate structures.

Kering's brand values, which are firmly anchored in sustainability, gender equality and innovation, are reflected in its strategic development over time. Launched in 2008, the Kering

Foundation, for fighting violence against women (Kering, 2023c), bridged the rebranding to Kering in 2013 well. Kering (2023a) states that their name is pronounced “caring,”: “a word that also reflects how we think of and build our relationships with our Houses, employees, customers and our stakeholders in general - as well as with the planet.” Kering’s strategy reflects its commitment to ESG principles (Lewis, Kim and Ozturk, 2025:11), with a brand vision centred on “Empowering Imagination” - placing creativity, sustainability and innovation at its core (Kering, 2025b), fostering talent, entrepreneurship, authentic luxury experiences and social and environmental responsibility to create lasting value (Kering, 2025b). The brand promise is tangible and “embodies a clear idea and value proposition”, that appeals to consumers on both an emotional and functional level (Kotler et al., 2016:424). In order to promote gender equality and aid groups that fight gender-based violence, Kering teamed up with the Cannes Film Festival in 2015 to introduce Women in Motion and the yearly Caring for Women dinner (Kering, 2023c; Kering Foundation, 2023). As Achille and Zipser (2020) note, consumer demand for responsible consumption grew post-COVID, increasing the importance of businesses’ transparent sustainability efforts. Kering has upheld its brand promise by making sustainable development central to its company culture and strategy (Kering, 2025b), publishing an Environmental Profit and Loss account (EP&L) since 2015 (Abnett, 2016) and launching the Regenerative Fund for Nature in 2021 to promote regenerative agriculture (WBCSD Communications, 2021).

In 2022, Kering co-founded the €300 million Climate Fund for Nature by partnering up with L’Occitane Group, committing €100 million to support projects like the Peru initiative, protecting 125,000 hectares of forest, preventing over one million tons of CO2 emissions and benefiting 550 households (Paris Peace Forum, 2023; Kering, 2024a:4). Additionally, Gucci established “The Circular Hub” in Italy to pioneer circular luxury (Kering, 2023b). In 2022 Kering banned fur across all Houses and set strict animal welfare standards (Kering, 2021). These efforts demonstrate that their integrated business model accumulates resources across logistics, property, information systems and media buying, enabling House’s internal innovation while maintaining each House’s creative autonomy (Kering, 2025c).

Brand Communication: Visual and Strategic Communication

“The brand’s design can affect preference by offering cues to quality” (Doyle and Stern, 2006:168). Kering’s visual identity uses minimalist, elegant designs with soft beige and white tones to convey timeless sophistication and subtle luxury. The owl emblem (Figure 1), representing “wisdom, protection, and vision - three qualities we want at the core of our management model” (Kering, 2023a), reflects the group’s focus on sustainability, long-term

value, and “care” for its Houses, people, and the environment. The name “Kering,” from the Breton word “ker”, meaning home, reflects the group’s roots in Rennes and commitment to nurturing a “supportive environment” for the growth of its employees and Houses (Kering, 2023a).

Clean, modern fonts reflect innovation, while packaging, following the principles outlined in their Econdesign Tool For Packaging Items report, remains minimalist yet luxurious, using eco-friendly materials to reinforce the brand’s commitment to environmental responsibility (Kering, 2024b; Kering, 2024c).



Figure 1

Oswald (2012:51) states, “brand communication is an entirely social phenomenon,” highlighting how Kering’s visual identity aligns with cultural codes of sophistication and environmental stewardship. The minimalist design embodies what Oswald (2012:51) calls the “material dimension” of marketing signs, where tangible elements like logos and packaging convey intangible brand values. Oswald (2021:54-55) differentiates denotation - providing clear, universal recognition - from connotation, which evokes subjective, culturally influenced associations. For Kering, the owl logo and simple typography directly reference the brand’s name (denotation), connoting wisdom, environmental consciousness, and trust through toned-down colour choices.

Beyond visual elements, Kering employs strategic communication to engage customers across its Houses, consistently reinforcing ESG principles and luxury positioning. Social media serves as a key channel where initiatives like the Women in Motion program are amplified with celebrity endorsements - such as interviews with Angelina Jolie and Selena Gomez shared on Instagram (Instagram, 2025). Zafar and Rafique (2012:62) found that celebrity endorsements significantly influence consumer attitudes and purchase intentions, making this an effective strategy for promoting Kering’s social initiatives. Kering’s messaging, with slogans like “Empowering Imagination”, underscores its commitment to creativity, sustainability, and craftsmanship. They foster a strong emotional connection with their audience by maintaining this

consistency across visual and strategic communication. As Oswald (2012:50) notes, “semiotic analysis aligns the brand meaning and positioning with consumers’ personal, social, and cultural needs and expectations”- a principle Kering hence applies to sustain its luxury brand status.

Competitor Analysis and Strategy for the Future

Differentiating a brand from competitors requires addressing rational and emotional aspects, using models like the brand pyramid (Doyle and Stern, 2006:170; Kapferer, 1994), adapted in Figure 2:

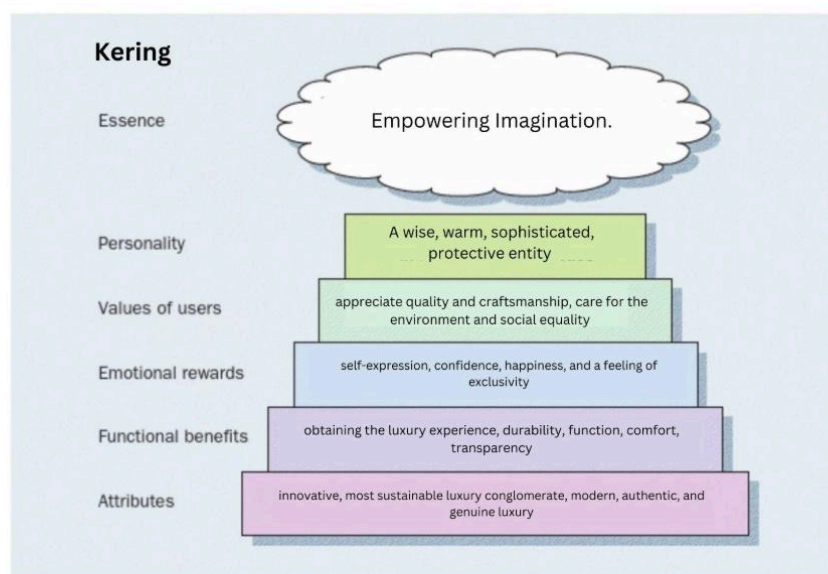


Figure 2

With a 2024 €17.2 billion global luxury market share (Statista, 2024a), Kering competes with industry leader LVMH (€85 billion) (Statista, 2024b) and Richemont (€20.62 billion), which, unlike its competitors, is largely jewellery-focused (Statista, 2024c). Based on the literature (Lewis, Kim and Ozturk, 2025; Pinheiro Esteves, 2023; Kering, 2025b; Kering 2024b; Achille and Zipser, 2020), the SWOT analysis reveals key differences:

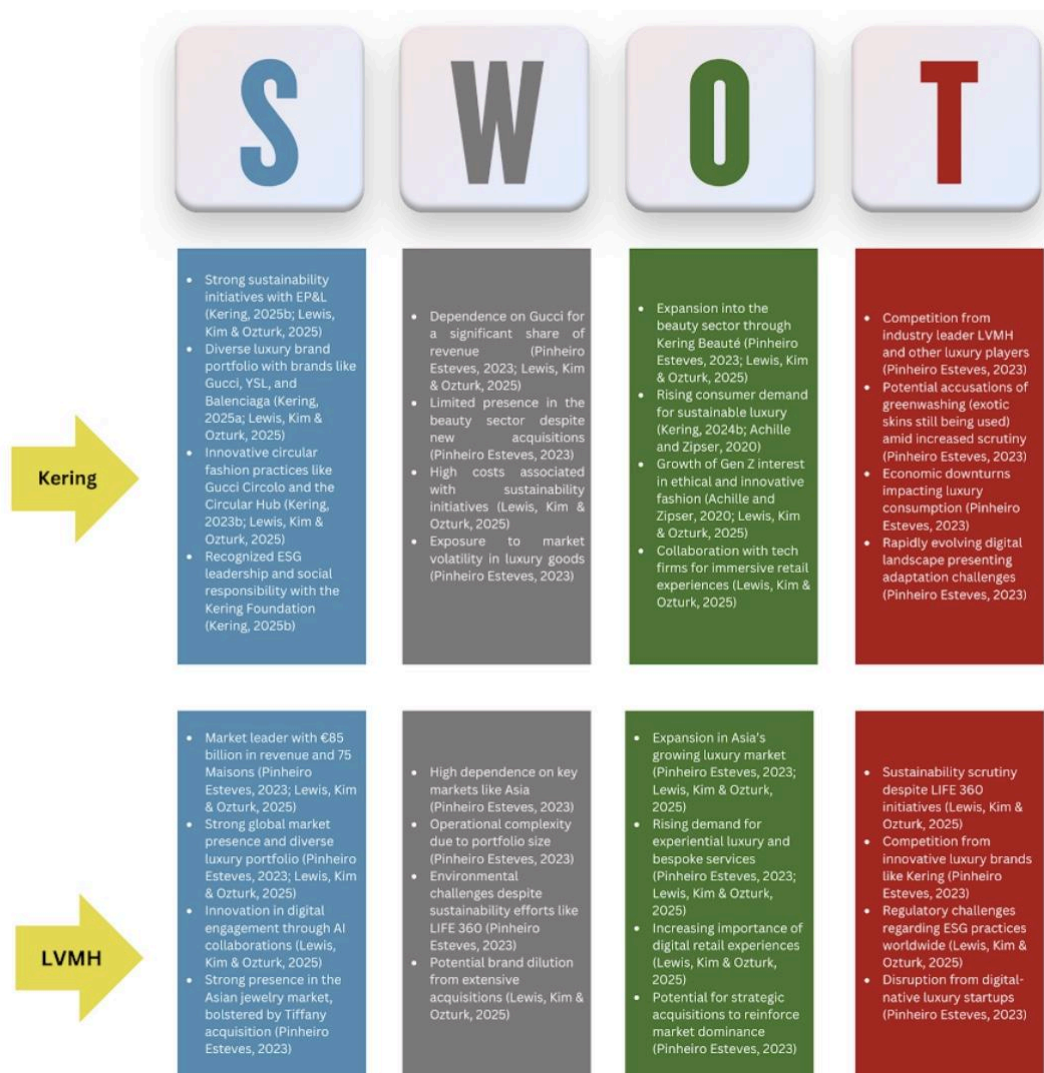


Figure 3

The primary distinction lies in sustainability and ESG leadership. Kering places sustainability at the core, publishing EP&L reports and implementing environmental/social-driven initiatives (Kering, 2025b). Pinheiro Esteves (2023) identifies Kering's supply chains as industry-leading in sustainability. As Kotler et al. (2016:154) highlight, sustainability is a key megatrend critical for long-term competitiveness. In an industry known for environmental malpractices (Fernandes, 2019:6), Kering has achieved a sustainable competitive advantage through its 2013 strategy change rebrand under the motto "Empowering Imagination" (Fernandes, 2019:6). This shift encompassed core structural, operational, and mission changes to address evolving consumer preferences.

Another major difference is portfolio structure. Kering concentrates on high-end fashion and accessories while gradually expanding into eyewear and beauty (Kering, 2025a; Lewis, Kim

& Ozturk, 2025). In contrast, LVMH has a more diverse portfolio spanning fashion, wines, spirits, cosmetics, and jewellery (Pinheiro Esteves, 2023), resulting in greater market coverage but increased operational complexity. M&A are crucial for growth in the competitive luxury sector (Lewis, Kim, and Ozturk, 2025:6). To maintain competitiveness, Kering must continue acquiring brands to reduce reliance on Gucci, its primary revenue driver (Pinheiro Esteves, 2023). Cultural codes further differentiate the two brands. LVMH's 75 Houses evoke traditional luxury codes, such as heritage and craftsmanship, but face challenges maintaining consistency (Lewis, Kim & Ozturk, 2025). Kering, meanwhile, employs distinct symbolic cues - like its name, free from brand associations and its owl emblem - to communicate its care-driven, sustainable identity.

Looking ahead, Kering should build on its sustainability-driven competitive advantage by eliminating exotic skins across its brands to reinforce its commitment to environmental stewardship. The beauty sector also offers growth opportunities; by acquiring eco-conscious brands for Kering Beauté, the group can meet rising demand for responsible luxury. Vertical integration, already successful with Kering Eyewear, should be extended to the beauty sector to streamline operations and maintain quality standards (Kering, 2025a). These strategies align with industry trends, strengthening Kering's competitiveness.

Conclusion

Kering's evolution into a luxury leader reflects its commitment to innovation, sustainability, and social responsibility. It differentiates itself from competitors like LVMH through ESG leadership, a focused portfolio, and culturally resonant communication. Its minimalist visual identity, the owl logo, and the "Empowering Imagination" motto convey long-term value, while social media engagement and celebrity endorsements reinforce initiatives like Women in Motion and EP&L reporting for social impact. Future growth should prioritize eco-conscious beauty lines, AR/AI-driven experiences, and sustainability-focused partnerships.

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