



THE GLOW INDEX

H1 2025

Measuring the Impact of Newness
in China Luxury

Newness as a Growth Engine in China's Luxury Market



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As we reach the midpoint of 2025, the pressure to get product launches right has never been greater. With growth becoming increasingly polarized, a solid performance of upcoming F/W collections will be critical to capturing momentum in the second half of the year. In this environment, the ability to deliver newness that truly resonates locally is no longer optional, it's a commercial imperative.

The **GLOW Index** offers a clear, data-driven view of how new collections contribute to revenue growth across leading luxury fashion and leather goods brands. By combining the share of new product launches with their revenue impact, this proprietary framework enables decision-makers to benchmark performance, identify strategic outliers, and optimize future assortments.

The GLOW Index leverages proprietary insights from COMPASS: our Competitive Intelligence Platform for Luxury Brands in the Chinese Market

BENCHMARK YOUR PERFORMANCE

against your competitors across channels

IDENTIFY PERFORMANCE GAPS

and opportunities to prioritize

GENERATE NEW GROWTH OPPORTUNITIES

at speed



MARKETING

Benchmark your brand's digital impact against competitors. Track audience growth, content performance, and UGC to understand what drives engagement—and what doesn't



ECOMMERCE

Gain a clear view of revenue drivers. Benchmark performance against competitors, identify bestsellers, and evaluate the impact of key commercial events to uncover growth opportunities



MERCHANDISING

Benchmark your merchandising and pricing strategies against competitors. Evaluate key revenue drivers and portfolio gaps, and analyse the performance of new product launches to identify areas for growth

Key Questions COMPASS Can Answer

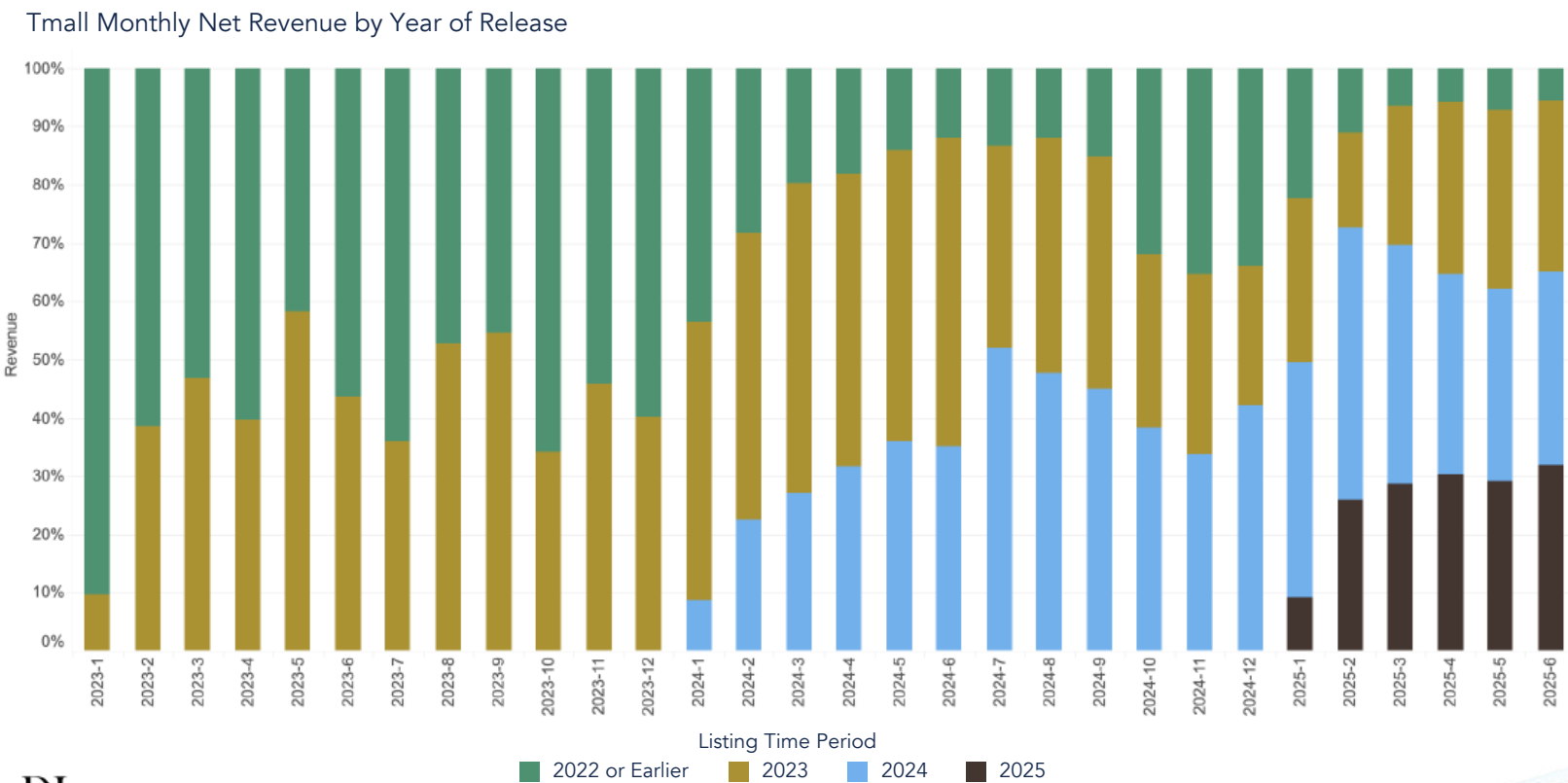
	1. MARKETING IMPACT	2. PRICING STRATEGY	3. DISCOUNT & PROMOTION	4. MERCH OPTIMIZATION	5. NEW PRODUCTS	6. GREY MARKET
YOUR BRAND	<p>Assess the success of your activations and the direct impact into your ecommerce revenues</p>	<p>Uncover category and product performance across price segments and measure portfolio premiumization</p>	<p>Align your promotional strategies to optimize your top line while protecting your brand equity</p>	<p>Track your portfolio development, discover over / under leveraged categories and subcategories</p>	<p>Measure the impact of new product releases into revenues over time</p>	<p>Assess Grey Market's impact on sales cannibalization and measure collection and brand power over time</p>
COMPETITION	<p>Measure the relative impact of your activations vs competitors, optimize your influencer strategy and learn from best practices</p>	<p>Identify portfolio pricing gaps and build portfolio strength based on changing market dynamics</p>	<p>Identify best practices and adapt your promotional actions to maximize revenue opportunities</p>	<p>Identify product trends and benchmark your performance against other brands' portfolios to maximize revenues</p>	<p>Uncover your competitors' new launches and seasonal strategies and related performance</p>	<p>Identify market product trends to inform your merch strategy and benchmark your brand health</p>

The GLOW Index: Growth Leveraging On Newness



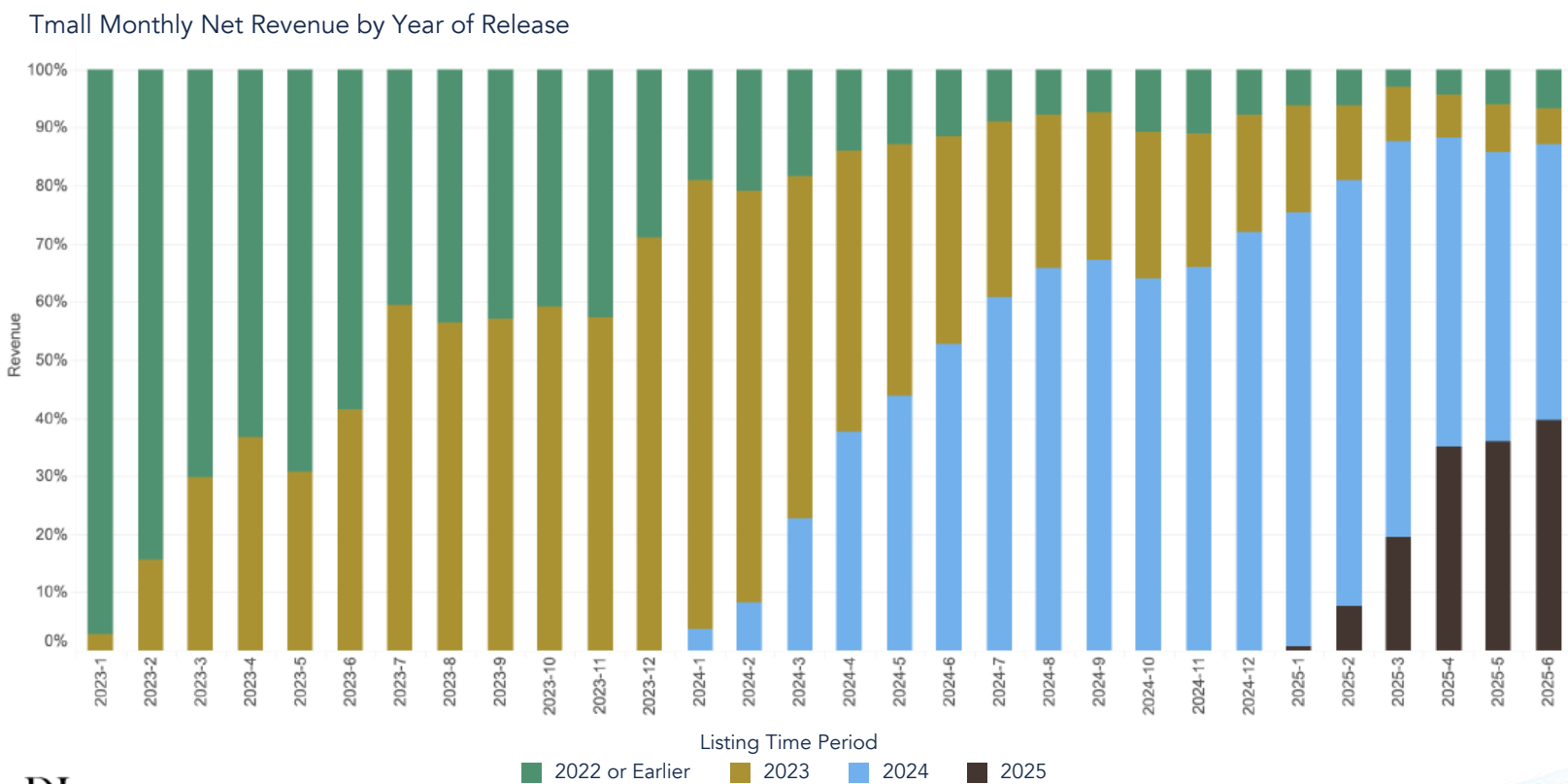
STRONG MOMENTUM: ACNE STUDIOS

Since the release of our first GLOW Index, the Swedish designer brand climbed out of the “Fading Signals” zone and into the “Strong Momentum” cluster, indicating clear improvements in both revenue growth and new product traction. By the end of June, items launched in 2025 accounted for 37% of the brand’s total Tmall listings and contributed nearly a third of total revenue. Key drivers included the 1981 jeans collection and the reissued 1996 T-shirt — both of which maintained full pricing with no discounts during 618 or other shopping festivals.



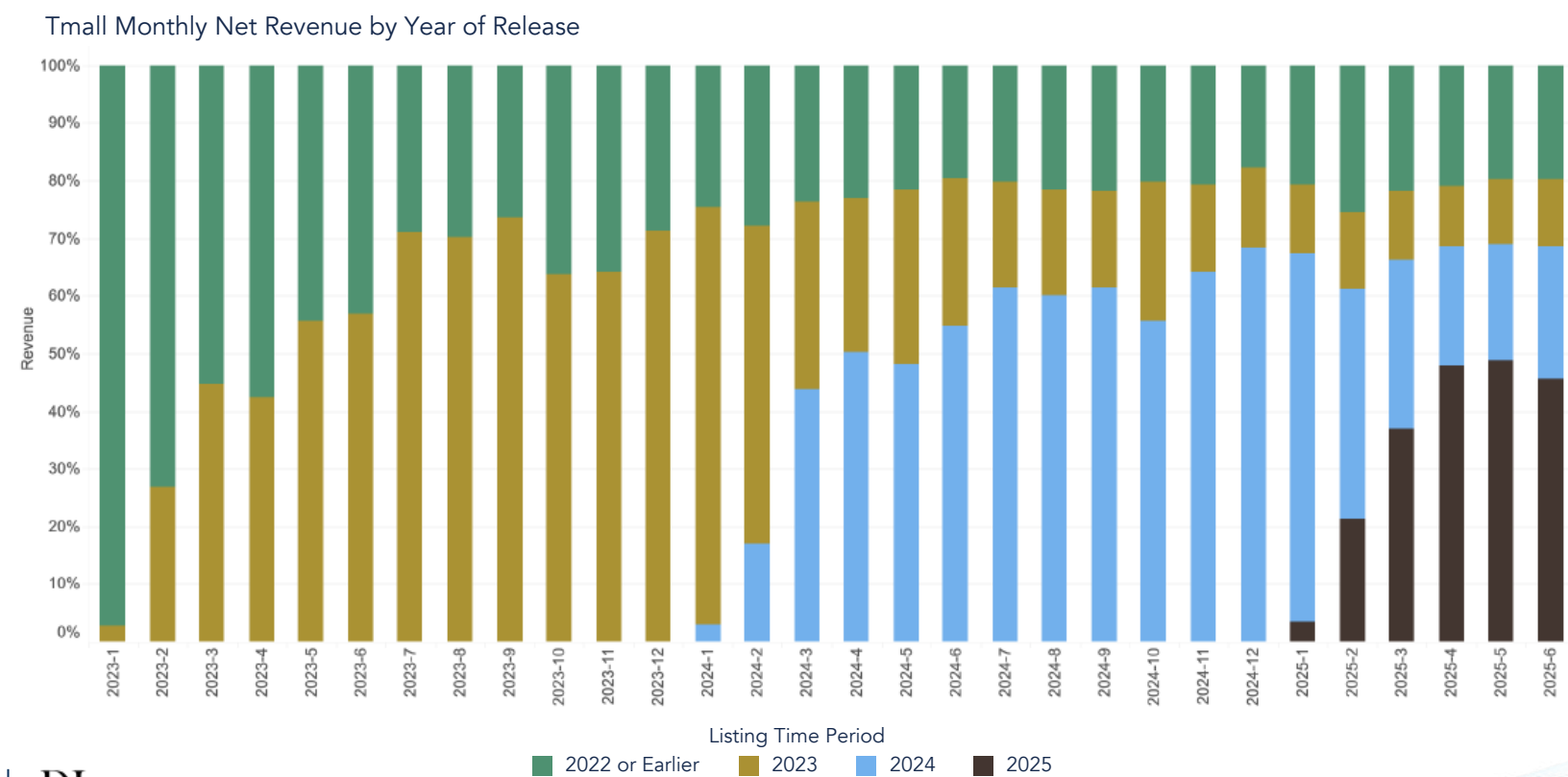
CREATIVE BRIGHT SPOTS: HUGO BOSS

New arrivals in 2025 made up 37% of Hugo Boss’ Tmall listings and generated a quarter of the total revenue in the first half of the year. However, the store saw a low-teens revenue decline YoY. While these new products showed some consumer interest, their performance was driven by discounting during major local milestones, rather than a sense of fresh fashion appeal. Among the top 10 bestsellers — three of which were new releases — all were offered at varying levels of discount, potentially undermining the brand’s long-term desirability.



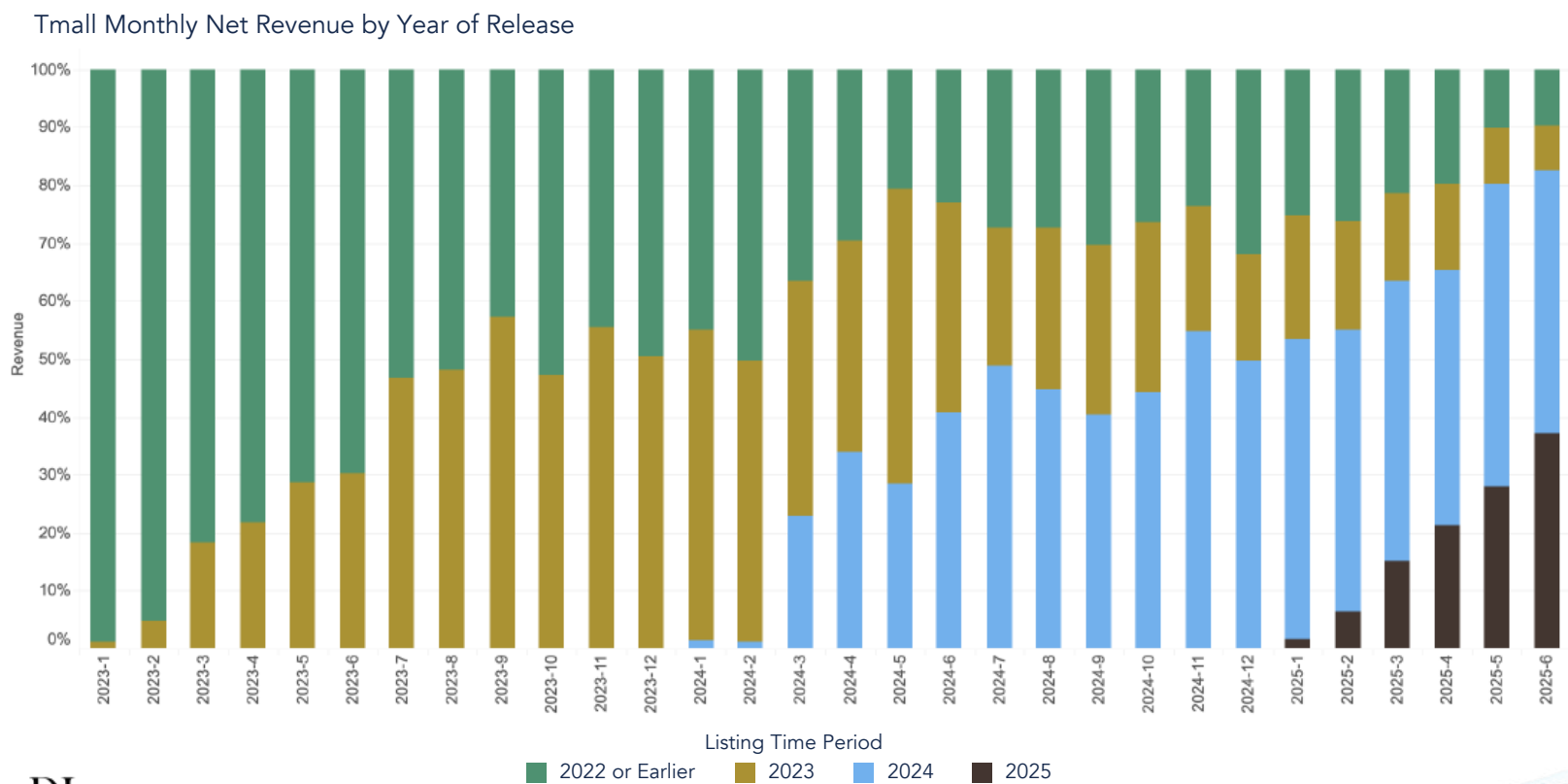
TIMELESS PERFORMERS: RALPH LAUREN

Riding the wave of the preppy and Ivy League trend in China, Ralph Lauren achieved double-digits year-over-year revenue growth from January to June. While its GLOW index remained slightly below the median at 0.60, its new product push has indeed been strong: 2025 launches account for 60% of listings and contribute to over a third of revenue. The brand has shown a clear commitment to novelty, including staging a replica of its Spring 2025 Hamptons runway show in Shanghai. Still, Ralph Lauren’s current strategy raises a key question: how can a heritage or resurgent brand maintain relevance in a market increasingly driven by freshness?



FADED SIGNALS: BURBERRY

Burberry continues to lose momentum — both globally and in China. The brand saw a double-digit decline in Tmall revenue, with new products comprising 60% of listings but contributing just a fifth of revenue, far below the industry benchmark for novelty performance. Of its top 10 bestsellers, seven were entry-level items such as T-shirts and scarves, while higher-margin categories like coats and bags saw significantly lower demand. The brand now stands at a crossroads: should it continue to uphold its luxury positioning, or pivot toward a broader customer base?



Is Your Brand Positioned to Lead?

In a market where growth is increasingly selective, understanding how your product strategy stacks up against competitors is critical to capturing market share.

The GLOW Index provides a clear, data-driven lens to assess the commercial impact of your new collections, and reveals where your brand stands within China's highly competitive luxury landscape.

Luxury growth in China is expected to return, but not for everyone. The next wave will reward brands that are already aligned on product relevance and execution. Now is the moment to benchmark, adjust, and lead.

Schedule a session with us to receive your brand's GLOW Index positioning and to uncover where growth is being captured.

CONTACT

About Re-Hub

Re-Hub, a DLG company, is an AI-powered business intelligence platform designed to empower luxury brands with data-driven solutions across key business areas. By leveraging its proprietary Data & AI tracking platform and a dedicated team of PhDs and data experts based in Shanghai, Re-Hub delivers actionable insights across brand-owned digital channels, gray markets, and pre-owned markets. These insights help brands achieve clarity, alignment, and strategic optimization for their operations in China.

About DLG

DLG (Digital Luxury Group) is an independent marketing and technology group with offices in Geneva, Shanghai, and New York. The company provides social media, e-commerce, CRM, consulting, and creative services to luxury and lifestyle brands. DLG is renowned for its expertise in defining and implementing impactful business strategies, combining technological know-how, creativity, and luxury savoir-faire to target sophisticated consumers.



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