

A woman with her hair in a bun, wearing a dark vest over a light-colored long-sleeved shirt, stands in a library with rows of bookshelves. The entire image is overlaid with a semi-transparent orange filter.

Sustainability

Drive your growth with sustainability intelligence

Euromonitor International Sustainability

1. Identify the right opportunities.
2. Measure how you stack up.
3. Build a winning strategy.
4. Deliver with impact.



Passport Sustainability: What's included?

Helping you solve the sustainability puzzle

We help you identify and measure opportunities in sustainability through multiple lenses:

Products: Make the right sustainable product claims in the right markets, at the right time.

Consumers: Evaluate consumer attitudes and behaviours surrounding sustainability topics and claims.



Brands: Benchmark and track sustainability credentials from global brands, as well as new market entrants.

Industries: Identify and size sustainable business opportunities and assess potential threats.

Passport Sustainability: How it works



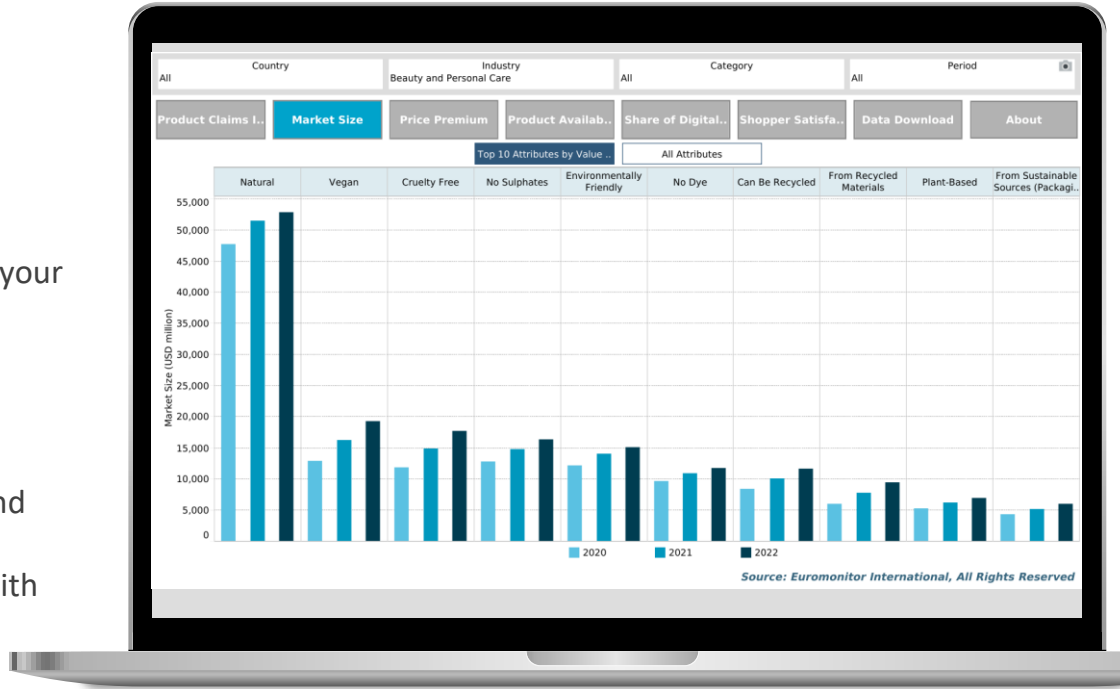
Analyse product claims: compare the development of established and emerging sustainability claims globally.



Benchmark against rival brands: Measure your sustainability performance against competitors and identify the biggest opportunities.



Stay on top of emerging trends: Understand and act upon consumers' and businesses' evolving attitudes towards sustainability with key insights and analysis.



Passport Sustainability: Key USPs

- 1 The full picture** – The only platform that offers global product claims analysis. Measure sales and penetration of 70+ sustainability claims using a standardised taxonomy across 25 countries, 11 industries & 50 categories.
- 2 Deeper analysis** - Delve into sustainability data and insights at a granular level. Analyse market size, product availability and price; explore shopper satisfaction by country, product category, brand and claim.
- 3 Connect the dots** - Validate market opportunities for specific claims against consumer needs and preferences using our proprietary data and methodology, rigorously tested over many years.
- 4 Avoid Greenwashing** - Use our claims trackers and survey insights to craft substantiated claims backed by data; aligned with evolving regulations and consumer preferences.

Passport tools: Sustainability Dashboards

Product Claims Tracker

Shows levels of sustainability adoption across countries and product categories

- 25 countries
- 11 industries
- 50 product categories
- 70+ individual claims
- 6 Data Types
- Updated annually

[View more](#)

Brand Claims Tracker

Benchmarks and tracks performance against competitors

- 25 countries
- 11 industries
- 50 product categories
- 70+ individual claims
- 6 Data Types
- Updated annually

[View more](#)

Quarterly SKU Count and Price Tracker

Measure how strongly a sustainability claim manifests itself and monitor median price changes for each claim

- 25 countries
- 11 industries
- 50 product categories
- 70+ individual claims
- 3 Data Types
- Updated quarterly

[View more](#)

Voice of the Consumer

Explore consumers' evolving sustainability attitudes, expectations and adoption

- 40 countries
- 1,000 responses per country
- 7 topics
- 12 consumer types
- Updated annually

[View more](#)

Voice of the Industry

Explores trends, strategies, investments and product launches

- 5 geographic regions
- 6 topics
- More than 1,000 respondents
- Updated annually

[View more](#)

Sustainability Report Analysis

Actionable and engaging thought leadership identifying key sustainability trends using a data-driven approach.

The latest titles include:

- Affordable Sustainability
- Understanding Sustainable Consumers
- Retailer Corporate Strategies in Sustainability

Comprehensive overview of 25 countries including consumer analysis, retail sales and industry trends.

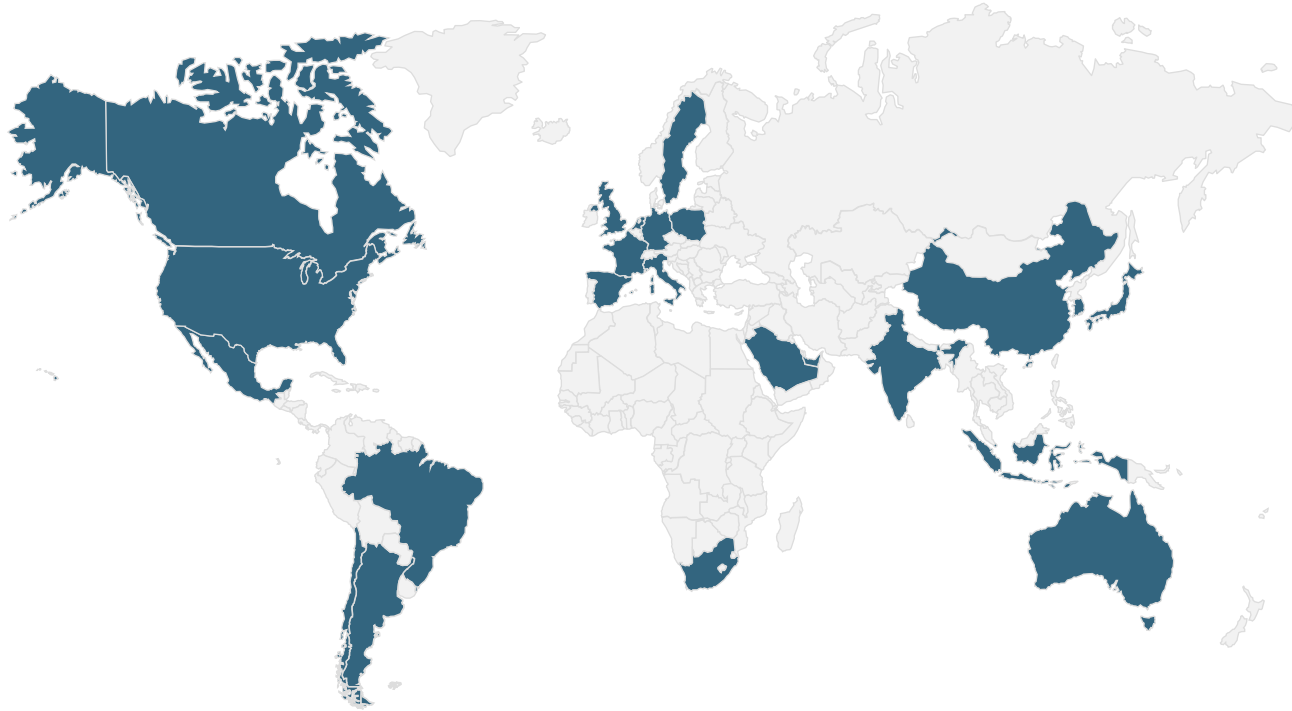


Dozens of examples showing how companies, brands and retailers are innovating with sustainability, including:

- Coca-Cola
- Procter & Gamble
- DoorDash
- Nestlé x Algramo
- Walmart

Analysis of different sustainable claims taking in retail sales, product availability, price positioning and shopper satisfaction for each of our 7 types of Sustainability claims

Global Coverage



Global Markets: 25

- Argentina
- Australia
- Brazil
- Canada
- Chile
- China
- France
- Germany
- Hong Kong
- India
- Indonesia
- Italy
- Japan
- Mexico
- Netherlands
- Poland
- Saudi Arabia
- Singapore
- South Africa
- South Korea
- Spain
- Sweden
- UAE
- United Kingdom
- USA



Industries: 11

- Beauty and Personal Care
- Consumer Health
- Cooking Ingredients and Meals
- Dairy and Milk Alternatives
- Hot Drinks
- Home Care
- Pet Care
- Snacks
- Soft Drinks
- Staple Foods
- Tissue and Hygiene

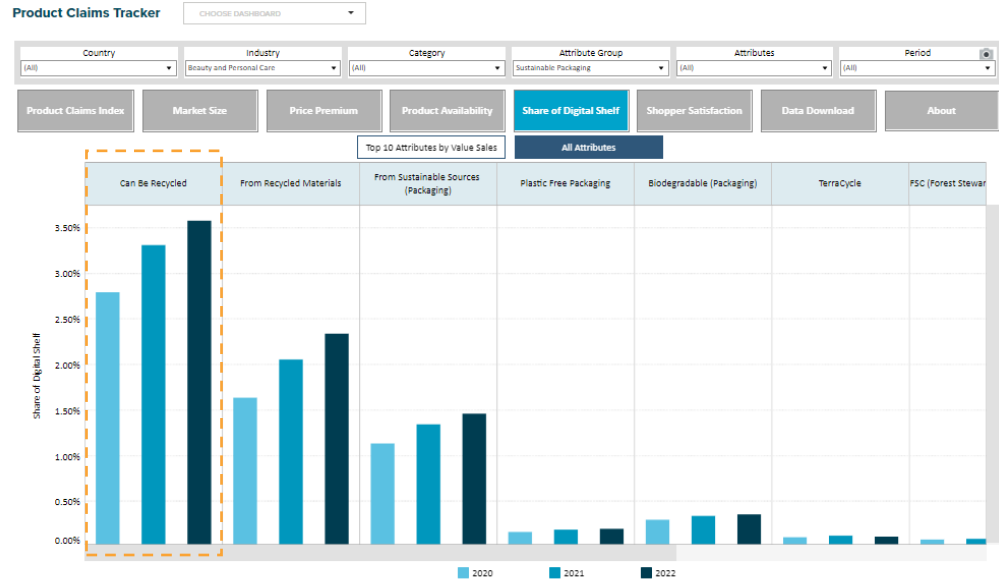
11 Industries | 25 Global Markets | 50 Product Categories | 70+ Sustainability Claims

Passport Sustainability: Sample insights

Spot opportunities from consumer signals

- **Industries:** 69% of business professionals in BPC report that their company plans to develop products with sustainable packaging in 2023.
- **Consumers:** 52% of respondents consider recyclable packaging sustainable in 2023, making it the most desired product packaging claim.
- **Products:** Only 3.6% of BPC Products currently hold a **“Can be Recycled”** sustainable packaging claim globally.

Source: Euromonitor's Voice of the Industry: Sustainability Survey, fielded January 2023; Voice of the Consumer Survey, fielded in February 2023 and Product Claims Tracker, updated in July 2023



Source: Euromonitor International, All Rights Reserved

Key insight: Our voice of the industry and consumer survey insights can signal real opportunities for product development when combined with data from our product and brand claims trackers.

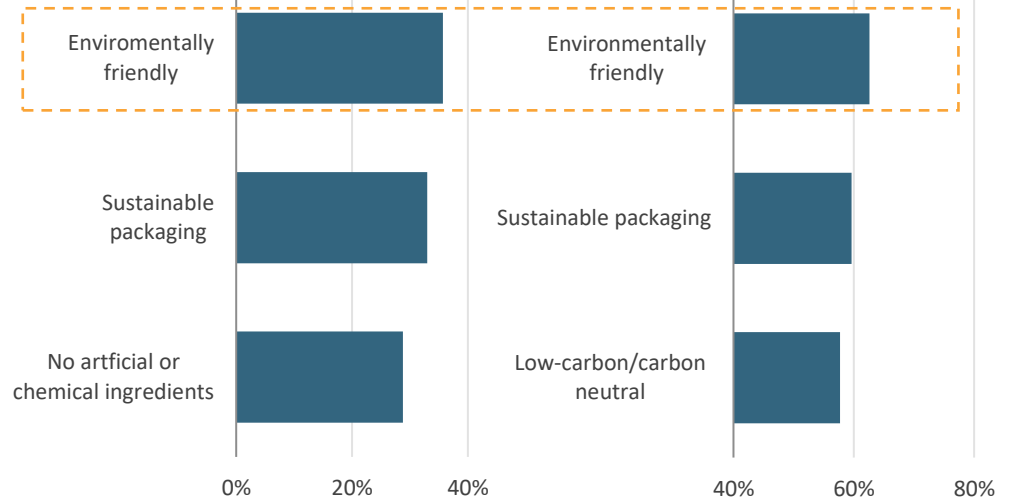
Adapt to face challenges in the regulatory environment

- **Consumers:** When analysing consumer purchasing behaviour and companies' plans to develop products with specific claims in 2023, the **“Environmentally Friendly”** claim ranks most popular.
- **Products:** Labelling products as “Environmentally Friendly”, however, lacks universally established standards, leaving companies susceptible to accusations of **“Greenwashing”**.
- **Legislation:** This concern is particularly pronounced in Europe, where **new legislation** is being introduced to counteract the practice of “Greenwashing”.

Source: Euromonitor's Voice of the Consumer Survey, fielded in February 2023 and Voice of the Industry: Sustainability Survey, fielded January 2023

Consumers: Recent Purchases of Sustainable Products, 2023

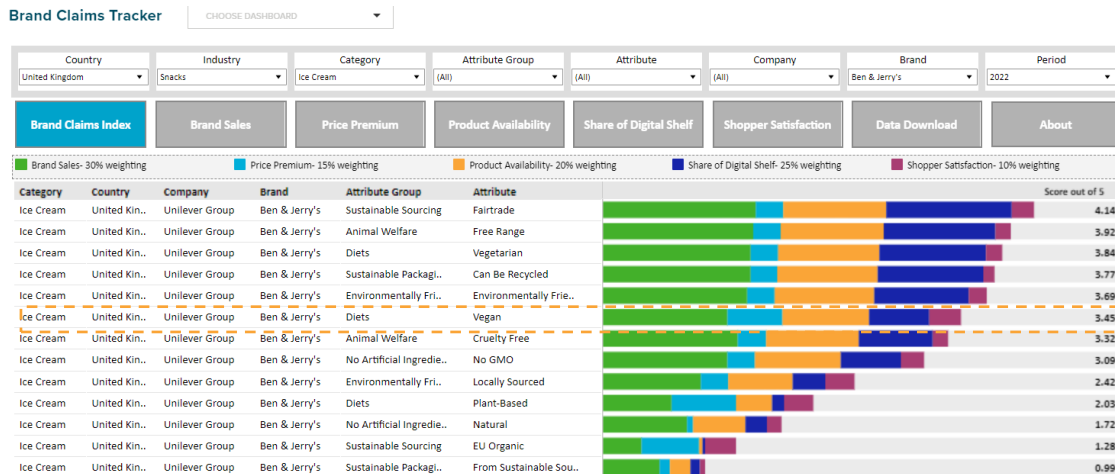
Top 3 responses, % of respondents



Key insight: Monitor the impact of regulatory changes and third-party-certified product claims over time and choose the right claims for the right markets.

Optimize your pricing by claim

- Brands:** Fairtrade and Free Range are Ben & Jerry's most adopted product claims in the UK in 2022. However, these brand-claim combinations don't support a higher price position.
- Consumers:** Ben & Jerry's Vegan ice cream variant is **4%** more expensive than Ben & Jerry's in general and still has a higher Shopper Satisfaction rating.
- Products:** With only an **9%** share of the digital shelf, vegan claims and products represent a clear growth avenue for Ben & Jerry's.



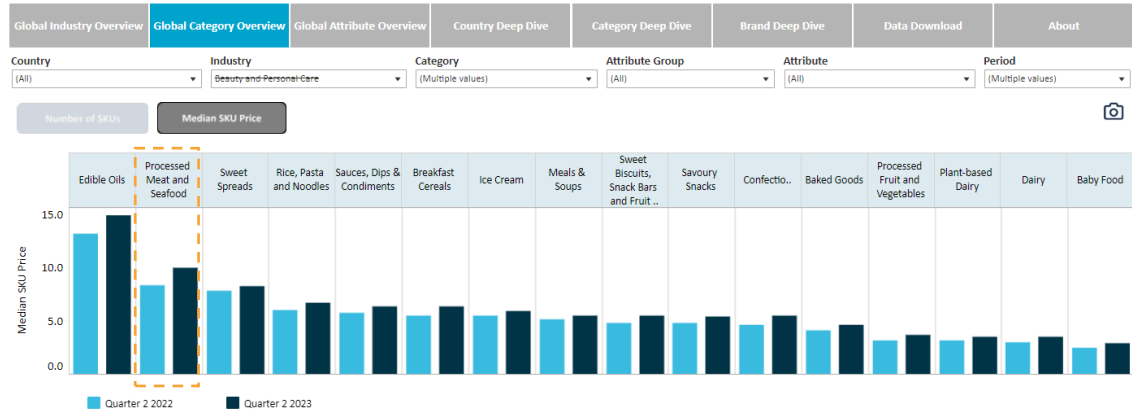
Key insight: Identify which sustainability claims are most valued by shoppers and which also drive a higher price point to reinforce margins.

Strike the right balance between claims and rising costs

- **Businesses:** 42% of business professionals consider the lack of consumer willingness to pay more for sustainable products a barrier in 2023.
- **Consumers:** 41% of consumers consider price the main barrier to making more sustainable purchases in 2023.
- **Products:** 21% YoY median SKU Price increase in Processed meat and Seafood products with sustainable claims in Q2 '23, the food category with the highest median SKU price growth.

Source: Euromonitor's Voice of the Industry: Sustainability Survey, fielded January 2023; Voice of the Consumer Survey, fielded in February 2023 and Product SU Count and Price Tracker, updated in July 2023

Quarterly SKU Count and Price Tracker



Source: Euromonitor International, All Rights Reserved

Key insight: Strike the right balance between promoting sustainable consumption and acknowledging consumers' financial constraints.

Coverage: Claims Trackers

Global Markets

Countries

1. Argentina
2. Australia
3. Brazil
4. Canada
5. Chile
6. China
7. France
8. Germany
9. Hong Kong, China
10. India
11. Indonesia
12. Italy
13. Japan
14. Mexico
15. Netherlands
16. Poland
17. Saudi Arabia
18. Singapore
19. South Africa
20. South Korea
21. Spain
22. Sweden
23. UAE (United Arab Emirates)
24. United Kingdom
25. USA (United States)

Data

Product Claims Tracker

- Retail Sales
- Price Positioning
- Product Availability
- % Share of Digital Shelf
- Shopper Satisfaction

Brand Claims Tracker

- Retail Sales
- Price Positioning
- Product Availability
- % Share of Digital Shelf
- Shopper Satisfaction

Quarterly SKU Count and Price Tracker

- Product Availability
- % Share of Digital Shelf
- Median Online Prices

Industries

Beauty and Personal Care

- Baby and Child-Specific Products
- Bath and Shower
- Colour Cosmetics
- Deodorants
- Depilatories
- Fragrances
- Hair Care
- Men's Shaving Products
- Oral Care
- Skin Care
- Sun Care

Consumer Health

- OTC
- Vitamins and Dietary Supplements
- Sports Nutrition
- Weight Management and Wellbeing

Cooking Ingredients and Meals

- Edible Oils
- Sauces, Dips and Condiments
- Meals and Soups
- Sweet Spreads

Dairy Products and Alternatives

- Baby food
- Plant based dairy
- Dairy

Home Care

- Air Care
- Dishwashing
- Home Insecticides
- Laundry Care
- Polishes
- Surface Care
- Toilet Care

Home Care

- Coffee
- Tea
- Other Hot Drinks

Pet Care

- Pet Food
- Pet Products

Snacks

- Confectionery
- Savoury Snacks
- Ice Cream
- Sweet Biscuits, Snack Bars and Fruit Snacks

Soft Drinks

- Bottled Water
- RTD Coffee
- Carbonates
- RTD Tea
- Juice








Staple Foods

- Baked Goods
- Processed Meat and Seafood
- Breakfast Cereals
- Rice, Paste and Noodles
- Processed Fruit and Vegetables

Tissue and Hygiene

- Retail Hygiene
- Retail Tissue

Coverage: Attribute Groups and Attributes

 Animal Welfare	 Diets	 Environmentally Friendly		 No Artificial Ingredients	 Safer/No Chemical Ingredients		 Sustainable Packaging	 Sustainable Sourcing		
Animal Friendly	Plant-Based	Biodegradable (Product)	Environmentally Friendly	Natural	BPA Free	No Pesticides	Biodegradable (Product)	FSC (Forest Stewardship Council)	Associazione Italiana Agricoltura Biologica	Rainforest Alliance
Certified Animal Welfare Approved	Vegan	Biodynamic/ Demeter	EU Ecolabel	No Dye	EWG Verified	No Phosphates	Can Be Recycled	Plastic Free Packaging	B Corp	Regenerative Organic Certified
Cruelty Free	Vegetarian	Blue Angel	Green Seal	No GMO	Made Safe	No Polyethylene	Compostable	Recycled PET	EU Organic	Responsible Forestry
Free Range		Carbon Neutral/ Reduced Carbon	Locally Sourced		No Bleach	No Solvents	From Recycled Materials	TerraCycle	Fair for Life	Responsible Marine Sourcing
Sustainably Fed/Raised		Carbonfree Certified	No Palm Oil		No Chemicals	No Sulphates	From Sustainable Sources	Widely Recycled	Fairtrade	Soil Association
		Climate Pledge Friendly	Nordic Swan Ecolabel		No Herbicide	No Surfactants			From sustainable Sources (Product)	Sustainable Palm Oil
		Compact by Design	Reef/Ocen Safe		US EPA Safer Choice				Global Organic Textile Standard	USDA Organic
		Cradle to Cradle Certified	Waterless/Water Savings						Nature	UTZ Certified
		Ecologo Certified Products	Zero Waste						Organic	Woodland Trust
		Certified CarbonNeutral by Climate Impact Partners	Carbon Neutral Certified by SCS Global Services							
		Carbon Neutral by Carbon Trust								

Questions: Consumer Survey (Cont 2)

Marketing Channels

Which of the following information sources do you typically rely on when deciding what to buy? Select all that apply.

Sample answers include: Friends and family recommendations, Blogger/social media influencer, Brand/company social media accounts

How trustworthy do you consider the following information sources? Sample answers include: Celebrity endorsement, Advertisement from company or brand, Government or non-government expert organizations

Shopping Attitudes

In this last section, we would like to learn a little more about you, your lifestyle, and your shopping preferences. Please look at the following statements and tick all that apply. Sample

answers include: I would rather buy fewer, but higher quality things, I try to shop in locally-owned stores

Thinking about your shopping preferences, please look at the following statements and tick all that apply. Sample answers include: I try to lead a minimalist lifestyle and do not buy new items unless necessary, I am willing to buy second-hand or previously-owned items

Key questions we can answer:

Products: What sustainability product claims are available and growing the fastest across markets? Which ones are most utilised?

Consumers: In which markets consumer demand for sustainable products is higher? Are consumers willing to pay more for sustainable products?



Brands: How does brand A compare to brand B regarding the range of sustainability claims they use? How do they compare in value sales?

Industries: How do companies choose to communicate sustainability initiatives and commitments with their stakeholders effectively?



Dairy Products and Alternatives with sustainability claims recorded **14%** value sales growth in 2022 compared with **5%** for products without sustainability claims.