



Euromonitor
International

Where to Play and How to Win? Mapping the Opportunity of Sustainability in Packaged Food

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INTRODUCTION

Scope

Key findings

THE NEED FOR SUSTAINABLE PRODUCTS

Emerging market consumers particularly positive about sustainability

Organic, the leading environmental sustainability label, loses share in 2020

Community impact and affordable eco-friendliness in high demand

COVID-19: from sustainability to purpose

SUSTAINABILITY CLAIMS' MARKET LANDSCAPE

Ethical labels is a small group without strong growth in packaged food

Rich variety of claims within ethical claims

Ethical claims not only for small premium brands

Who are the consumers demanding sustainability?

WHERE TO PLAY: PACKAGED FOOD SUSTAINABILITY INDEX

Methodology: a three-pronged approach to market measurement

Measuring sustainability in packaged food: data types and coverage

Packaged food product claims: tracking digital share of shelf

Green actions correlate with a desire to buy sustainable food and drinks

The "green macroenvironment": Euromonitor's Sustainability Index

Where to play: Nordic markets lead Sustainability Index in packaged food

Where to play: mapping the opportunities in packaged food sustainability

White spaces: high-potential markets with low claim penetration rates

HOW TO WIN: INNOVATORS IN SUSTAINABILITY

Nestlé innovates with sustainable packaging and phrasing of its claims

Unilever doubles down on use of ethical claims

Hipp is a multinational with a consistent approach to organic

Polarbröd rebuilds better during the pandemic after a devastating fire

CONCLUSION

Conclusion

APPENDIX

Measuring sustainability in packaged food: data types and coverage

Product Claims and Positioning method

Packaged Food Sustainability Index: included lifestyles survey questions

Packaged Food Sustainability Index: standardising scores

Overview of Lifestyles survey

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-to-play-and-how-to-win-mapping-the-opportunity-of-sustainability-in-packaged-food/report.