

# 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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