

Out of the crises: does green get the best deal?

Insights from the FMCG industry

18/10/2023

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Global Commercial Director, Advanced Solutions

Consumer Panel Services GfK



Eco-actives pushing through
Cost of Living impact
Brands have a job-to-be-done
Scaling-up



Main Sources today



Sustainability and product choice:

how does it affect shopping decisions in key industries?

- Who Cares Who Does
- Europanel, GfK, Kantar
- 5th edition in 35 countries, 112,000 households
- FMCG & plastic waste
- Consumer Panel Why2Buy
- Today: EU-16: BE, CZ, DE, DK, ES, FR, GB, HU, IT, IE, NL, PL, PT, RO, SE, SK



WHO CARES? WHO DOES? 2023

GET AHEAD OF THE SUSTAINABILITY CURVE

-  Harmonized survey from 35 countries – 9 more than last year!
-  Understand 5 year eco segment trends and other sustainable behaviours
-  Link segments to category databases to look at what is bought by those that say they care about sustainability

Country reports are now available!
Visit also our latest Webinar:
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Out now!

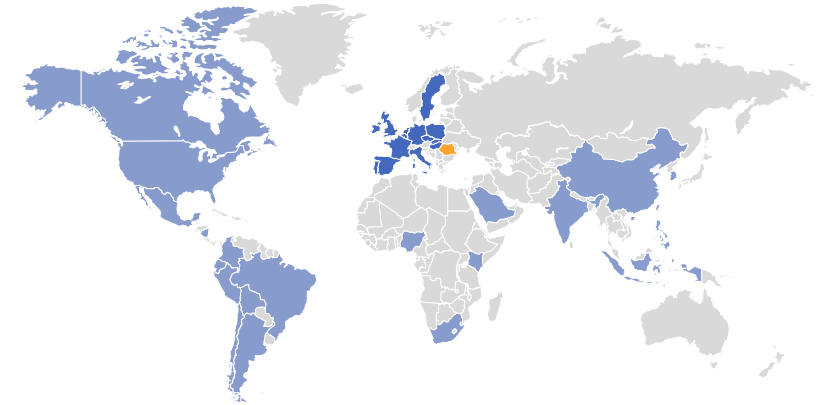
europanel

The graphic also features a circular seal with 'WHO CARES? WHO DOES? 5th YEAR' and a photo of a smiling woman holding a bouquet of flowers.

Who Cares, Who Does 2023



- Global harmonized survey of 35 countries and 112,000 respondents - to understand how to gain a competitive advantage from sustainability
- Single source linking attitudes and needs with actual purchase data using Consumer Panel data

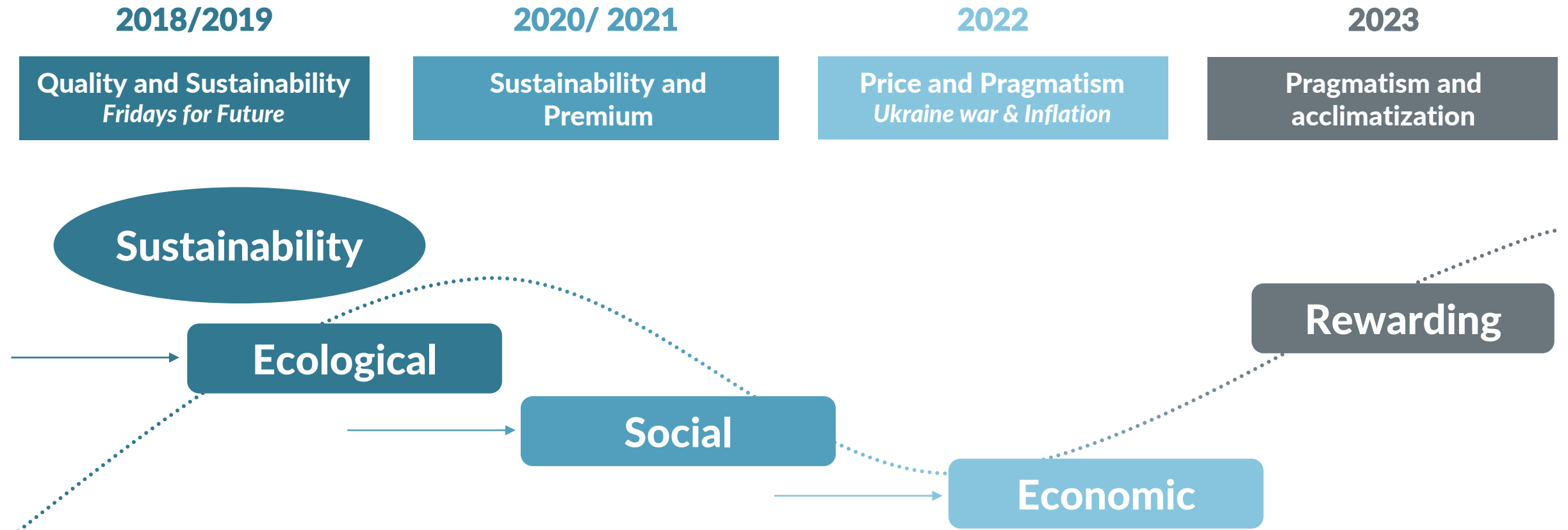


Our survey respondents are grouped into three segments based on their actions taken to reduce environmental footprint:



Through all the crisis also sustainability became more differentiated

From shoppers' perspective



Five years, five learnings

1

Europe – and Germany - still at the forefront. In all but 1 European country (DK) higher level of eco-actives than 5 years ago. Biggest increase in NL at a rate of +12 ppt.

2

Environmental concerns are stronger than ever and skewing more toward climate change. Solutions still hinge on local, packaging and plastic waste, yet the tide is turning

3

Action does not equal purchasing. An increasing number of households takes regular measures, yet purchasing green is slowed down by the Cost-of-Living crisis

4

Widening trust gap. Much is expected from manufacturers, yet shoppers often do not recognize nor trust their efforts. The crises have put governments more center stage.

5

Price remains the largest barrier to purchasing sustainably, but much is to gain when other key barriers like lack of know-how and perceived product functionality are overcome

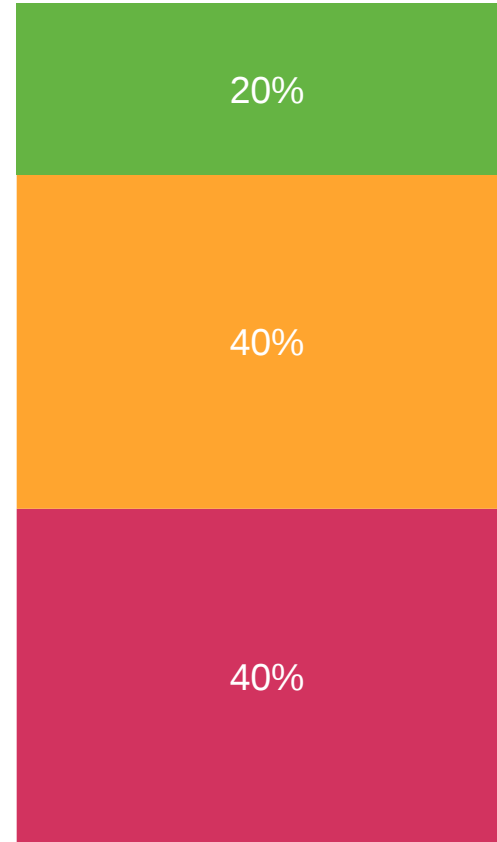


1

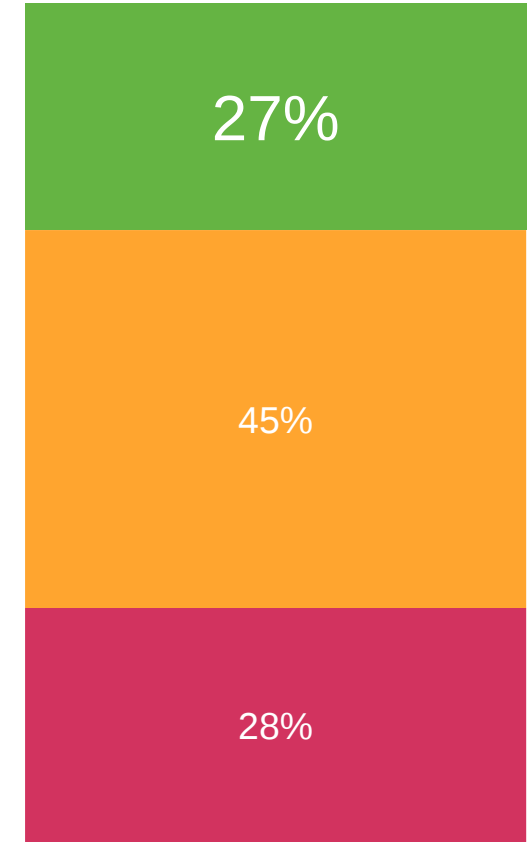
Eco-actives
pushing through
the crises



Eco-actives reach highest level so far in Europe



Global 2023



Europe 2023

European eco-actives surpass €250 bn worth

€254
BN

- Eco-active FMCG worth
- Opportunity to build
- Addressable market

+6.2
PPT

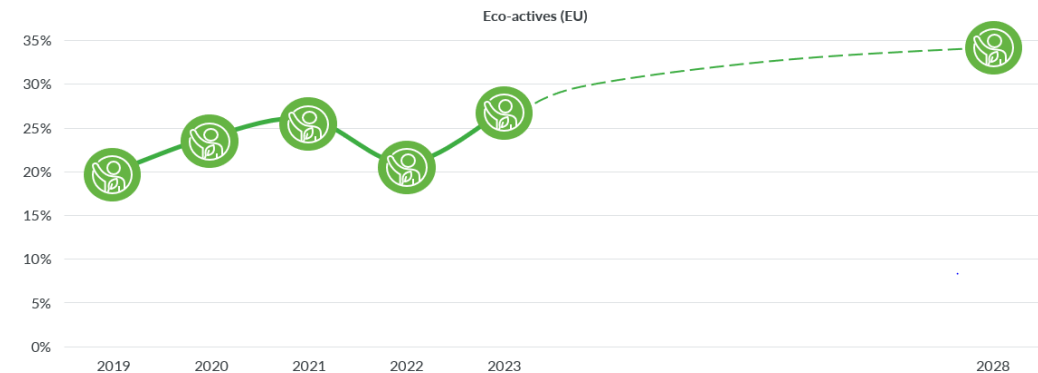
- Eco-share growth vs 2022
- 16/16 grow vs 2022
- 10/16 eco-actives above 25%

+1.1
PPT

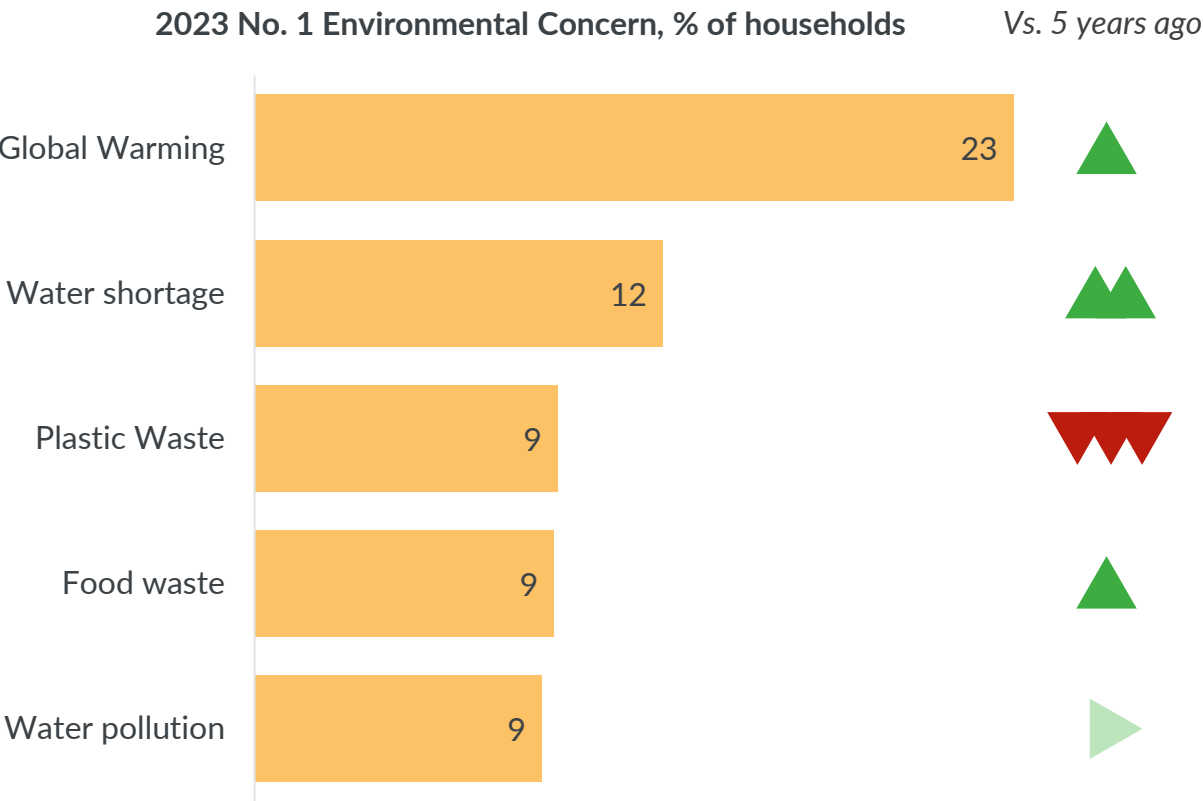
- Likely average growth rate
- 1 in 3 will be eco-active in 5 years
- Cannot afford to ignore



A 'most likely' scenario puts eco-actives up to one-third in 5 years



Global warming prime concern, worries about water shortage swell





“It upsets me how much plastic I end up with”

Europe

67%

Global 62%

“I try to buy products packaged in an environmentally friendly way”

Europe

57%

Global 63%

2

Cost of Living impact



The difficulty behind the actual circumstances

Inflation & Sustainability

Inflation

Price competition



Limitations



Brand pressure



Sustainability



Complexity



Investment



Regulations & obligations



Delegation of responsibility



44%



34%

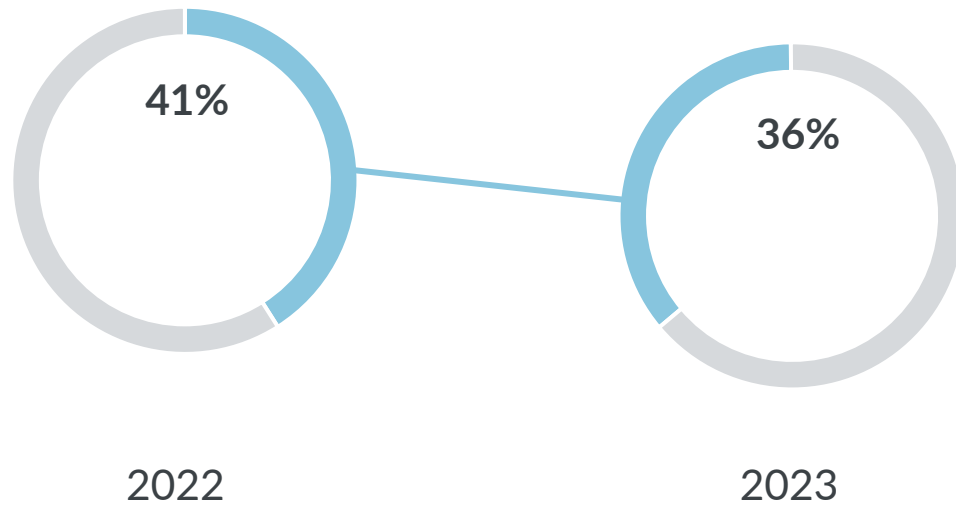


16%

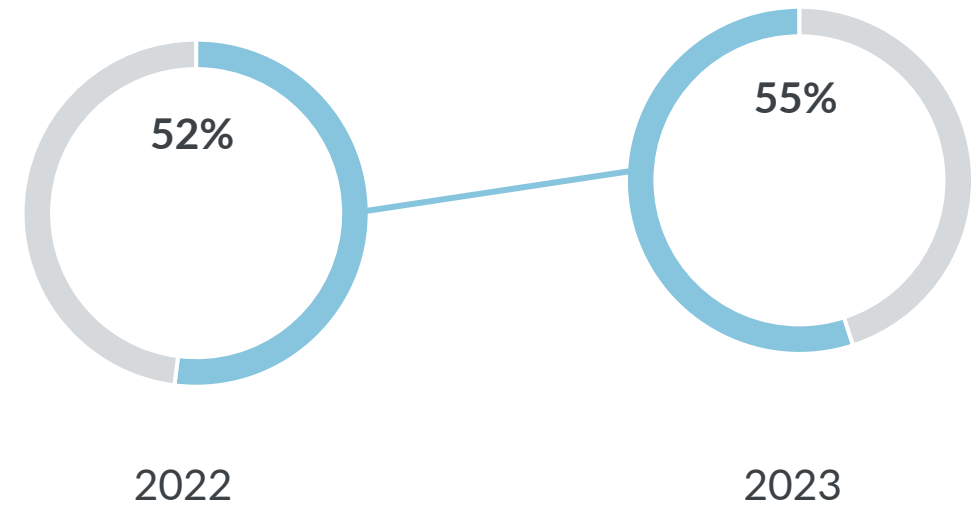


5%

Going green & Cost-of-living: less in store, more in home



I (almost) always take the environment into account when making a purchase



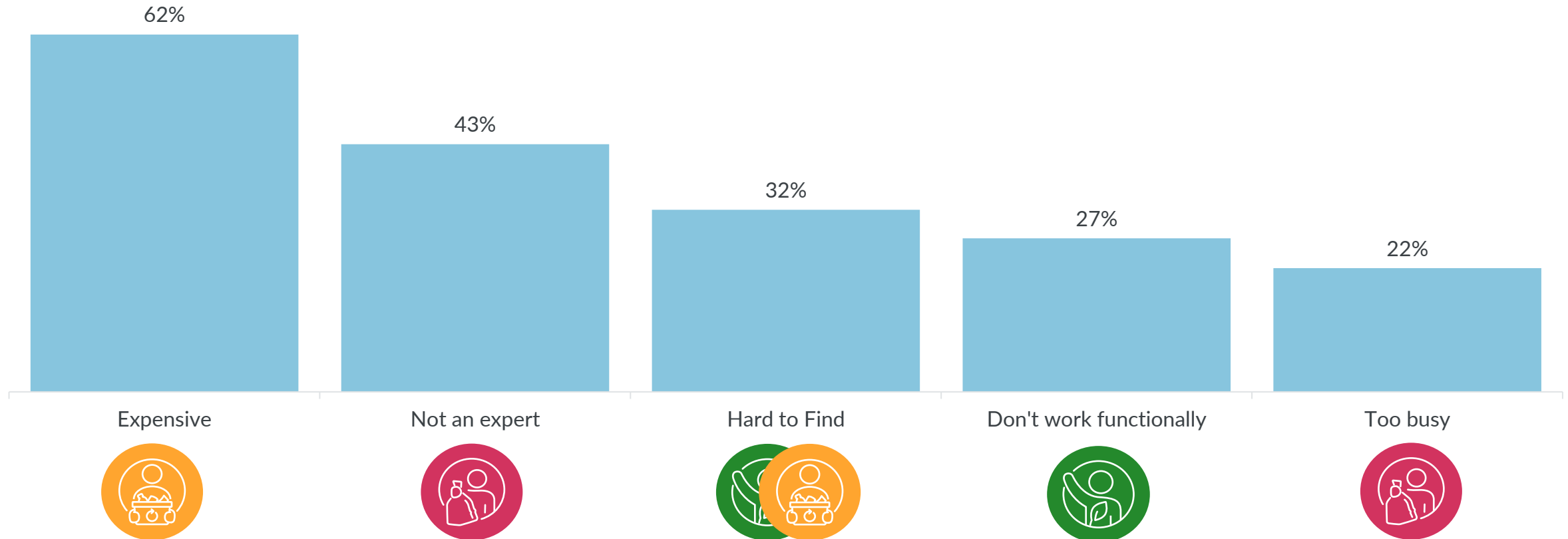
I always save energy in my home

Price remains major barrier, but 'total' approach means mending other barriers as well

What are the major barriers stopping you from buying sustainably?

% households, strongly agree & agree

Europe, all shoppers

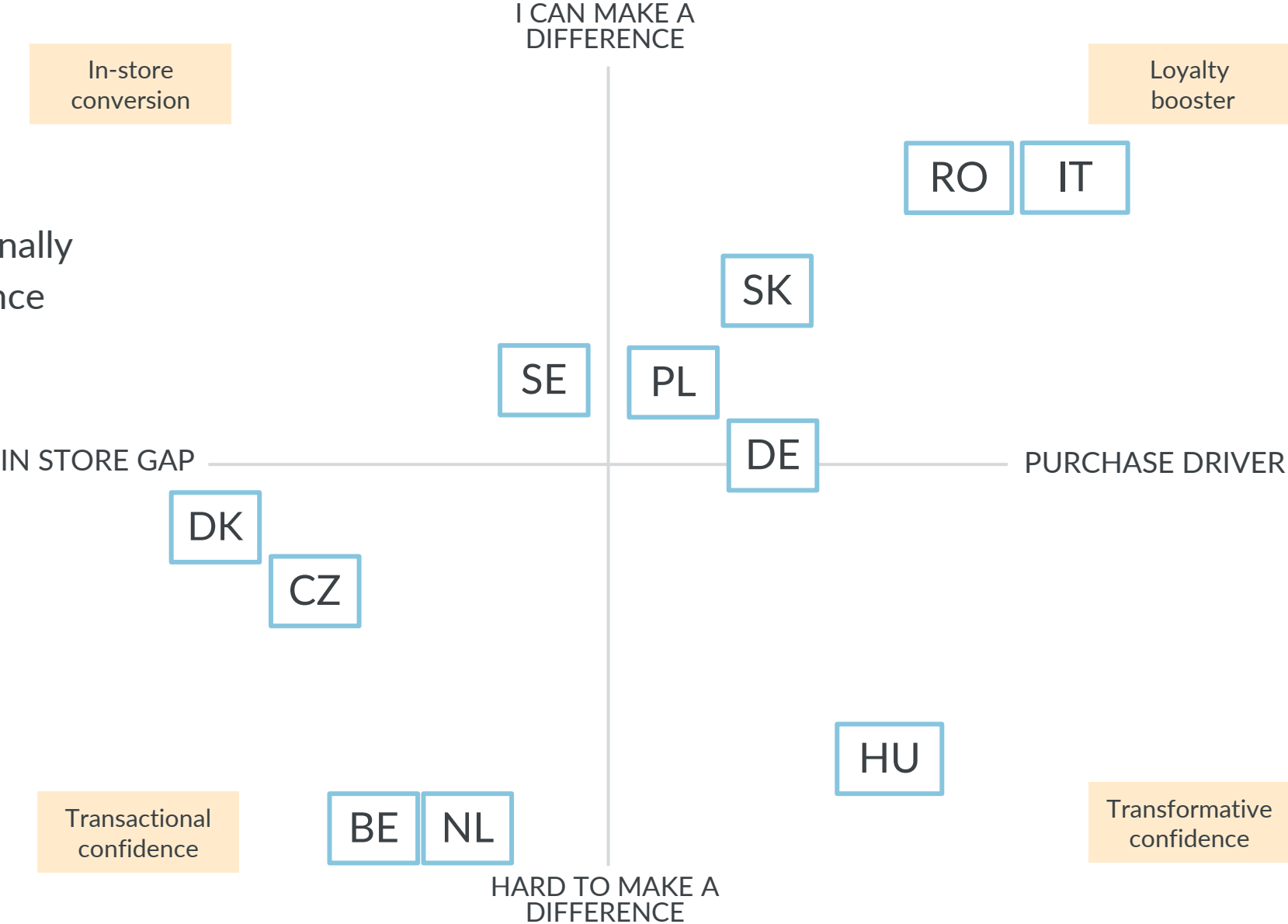


Shoppers need to be (RE)activated



54%

“I feel I can personally make a difference”



Local and packaging still top choice drivers

Carbon neutral up and coming, but often not understood

Top product choices

Top 3 - Choose this regularly



- 81% Locally sourced ingredients
- 80% Locally owned
- 79% Packaging from recycled material

Top 3 - Don't but would like to



- 30% Carbon neutral
- 26% Providing sustainability tips
- 25% Company donates to charity

Top 3 - Don't and won't



- 46% Fully vegan
- 32% Meat / dairy alternative
- 18% Features diversity in advertising

Don't know what this is



- 16% Carbon neutral
- 13% Featuring diversity in advertising
- 12% Protecting / promoting biodiversity

A young man with dark hair, wearing a black shirt with a colorful tropical print, is shown from the chest up. He is holding a small, yellow and white carton of 'SOYMILK PURE' with both hands and drinking from it. He is looking off to the side with a thoughtful expression. The background is a bright, cloudy sky. In the top right corner, there is a teal circle and the GfK CPS logo. On the left side, there is a purple trapezoidal shape containing the number '3' and the text 'Brands have a job-to-be-done'. The number '3' is large and white. The text 'Brands have a job-to-be-done' is in a smaller white font. The GfK CPS logo is in the top right corner, consisting of the letters 'GfK' in white on an orange square background, with 'CPS' in smaller white letters below it. The page number '19' is in the bottom right corner.

3

Brands have
a job-to-be-done

“Companies only care about profits; sustainability claims are just a marketing tool”

63%

highest in Europe...and growing

“I trust brands not to have raised prices more than necessary”

35%
trust

40%
distrust



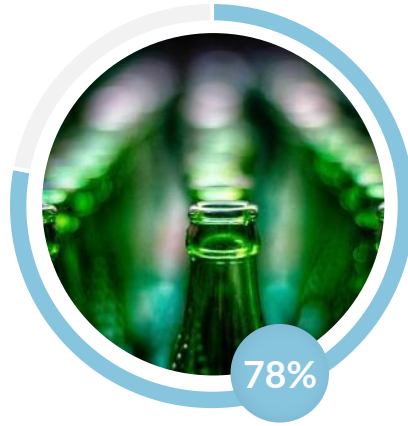
Low brand recognition, especially in beverages

7/8 out of 10 can't name a brand, 6 can't name a retailer

`I **CAN'T** name any brand that does a good job protecting the environment`



Food brand



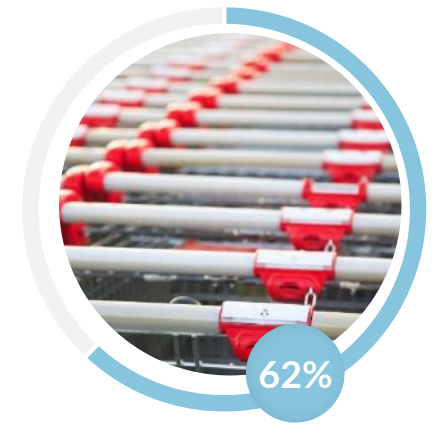
Beverage brand



Personal care brand



Home care brand



Retailer

Brands that are successful in reaching eco-actives

The Flower Farm

- Value growth vs YA +64%
- Penetration 11% to 14%



Spend per buyer vs YA

131

Rel. Penetration vs YA

109



107

133



107

141

Share



- Value growth vs YA +5%
- Penetration 6% to 7%
- Rel. penetration eco-considerers ix 105

Granoro



- Value growth vs YA +64%
- Penetration 8,5% steady
- Spend/buyer eco-actives ix 151

Serla



- Value growth vs YA +14%
- Penetration 39% to 41%
- Spend/buyer eco-dismissers ix 116

Long-standing A-brand HAK has made a green turn

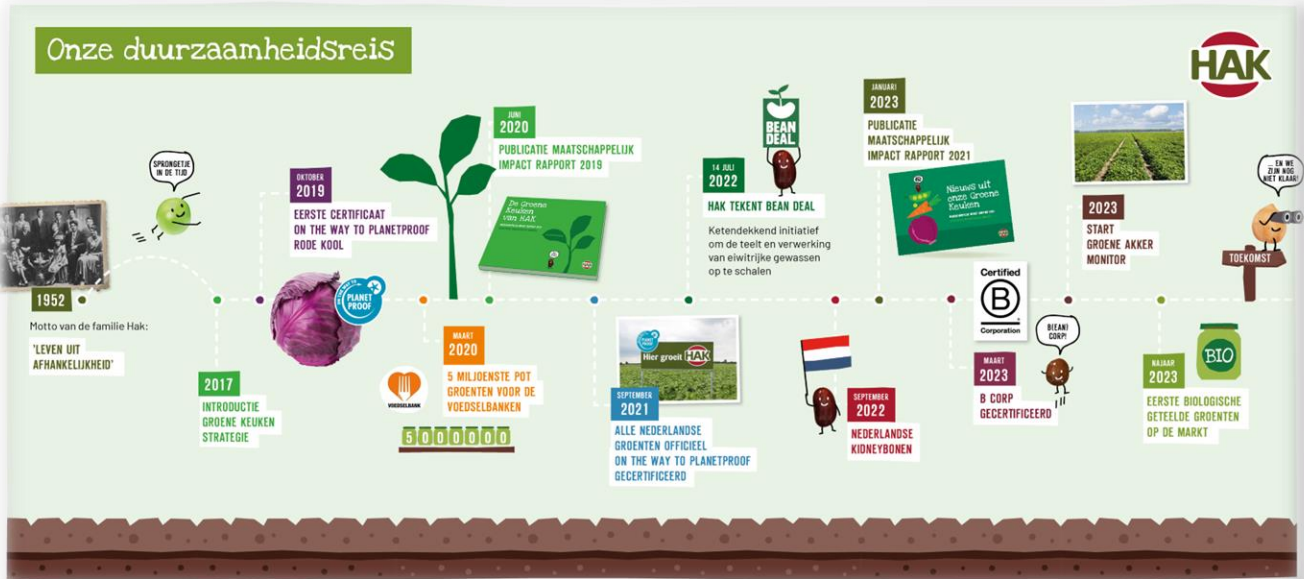
Overall penetration growth from 26 to 34%



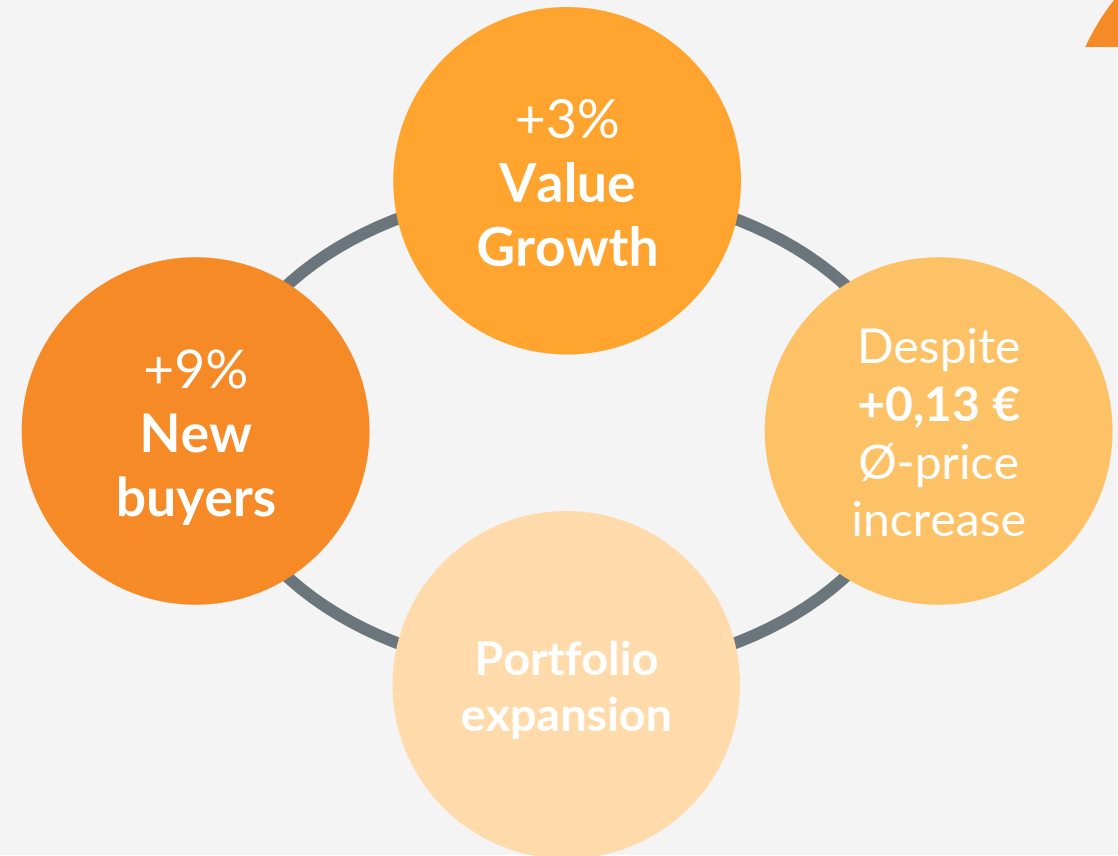
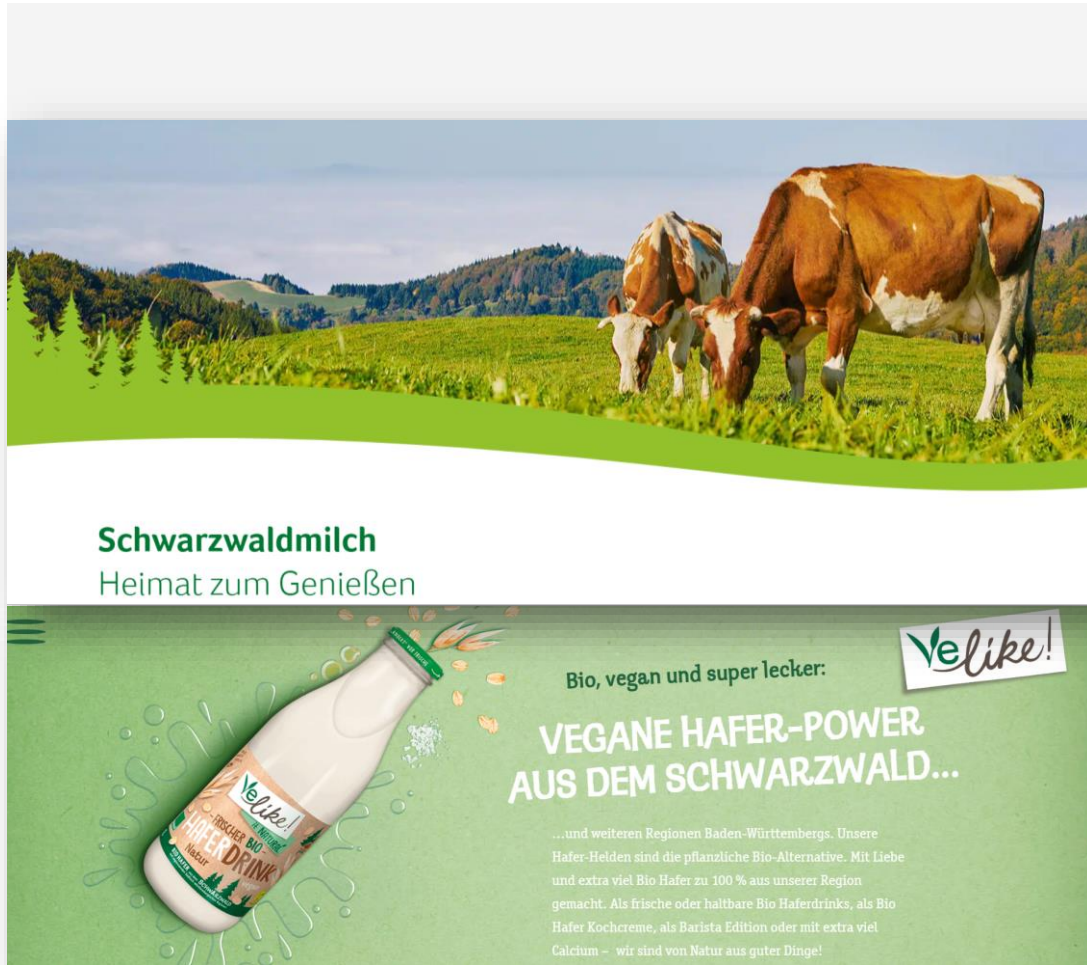
Value %
ix 110



9%
Name a food brand



Example: Schwarzwaldmilch - Regional Community, Holistic Thinking





On-pack messaging for rPE



Let's contribute to a circular economy together!

The plastic in this packaging is certified to support the use of materials that have already been used once.

Packaging using certified recycled plastic* that promotes the use of recycled materials (in plastic production). Helps ensure that fewer fossil materials are used.

*The plastic in this packaging is certified according to a mass balance procedure. It proves that fossil raw materials have been replaced with an equivalent amount of recycled materials.

Learn more about the path to a closed loop economy and give us feedback (scan QR code).

To keep RECYCLING going: discover a collection point near you at www.getraenkekarton.ch

The Tetra Pak quiz – how it works with the QR-code designs

► A consumer journey through the Tetra Pak world

1

Consumers see the code on the package & scan it.



2

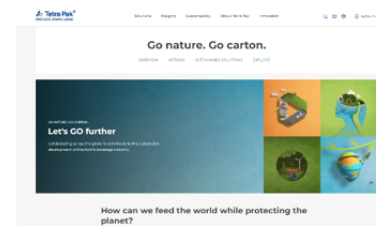
Consumers play the quiz while we collect data. At the end, they are prompted to "read more".



2 different types of quizzes (roulette, questions)

3

Consumers are taken to or web page to read more about sustainability.



Campaign landing page:
www.gonature.tetrapak.com



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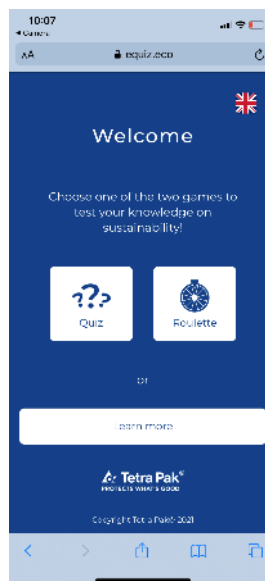
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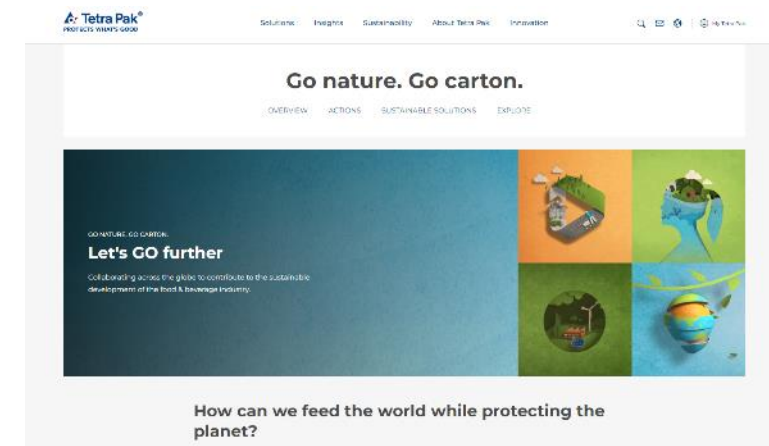
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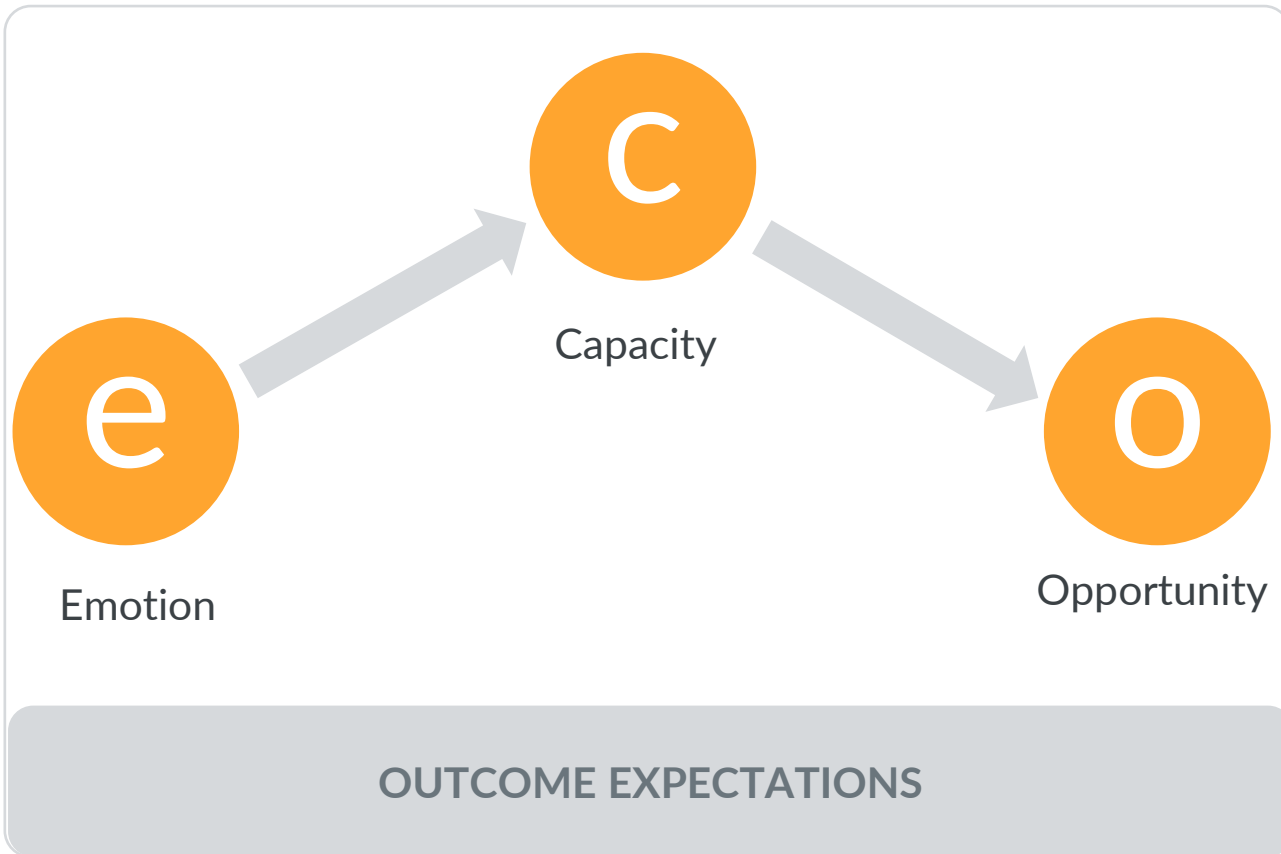
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5

Scaling-up

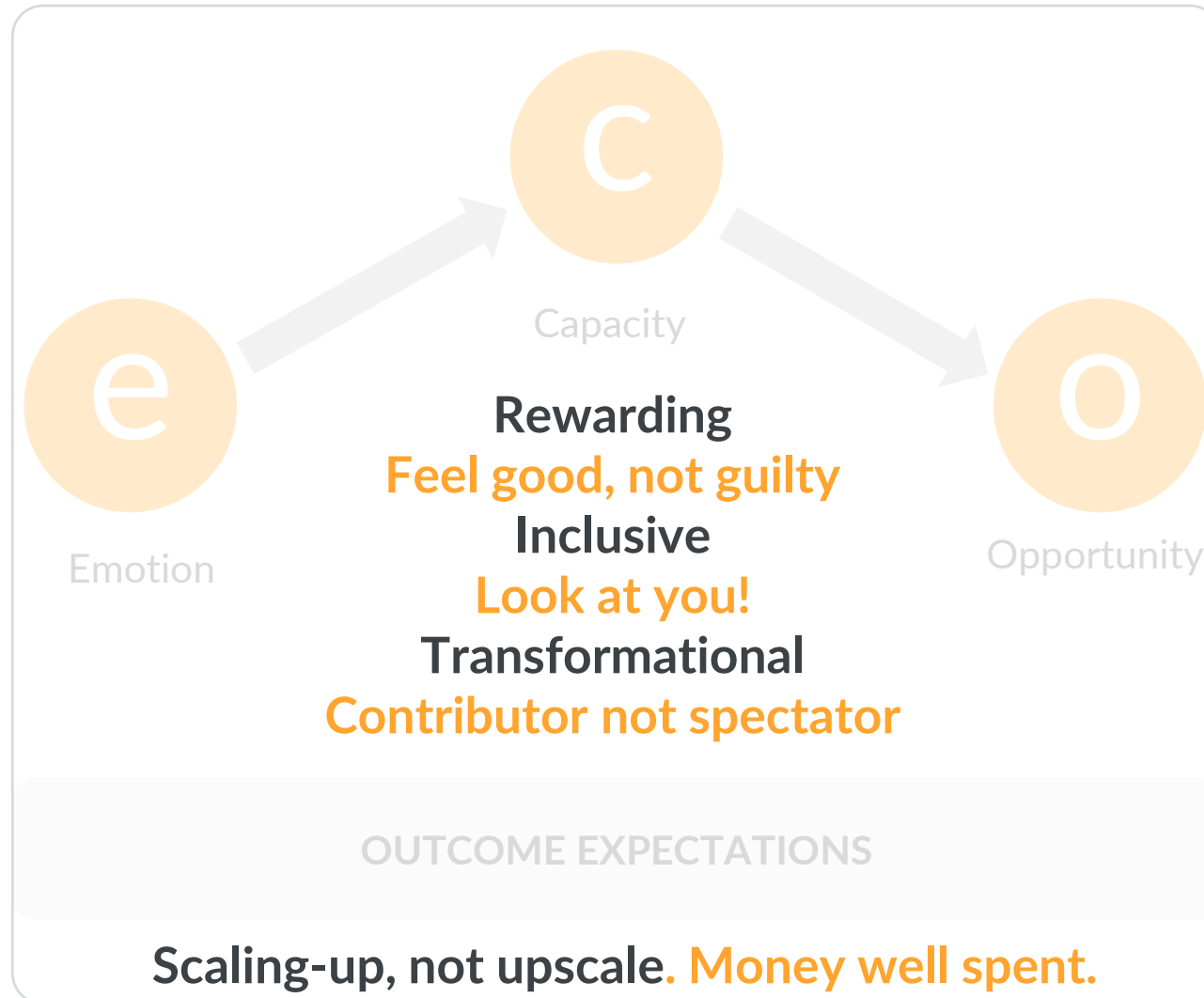


Driving behavior change



~~DOUBT~~

Driving behavior change



DOUBT

Sustainability Insights of Consumer Panel Services GfK



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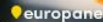
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FUTURE

POP UP

by CPS GfK Germany

TEAMS LIVE EVENTS

JEDEN DONNERSTAG

von 09:30-10:00 Uhr



Wie gelange ich zur Stage?

Klicken Sie auf das Teams-Symbol neben dem Datum

(Alternativ: Links Klick und Link öffnen oder Link auf Seite 2 öffnen).

19.10.2023 

Does Beauty Still Go Green?

Das Duell Hersteller- vs. Handelsmarke in Zeiten der Inflation mit Andrea Herzog, Tina Löwe und Katrin Steffes

Die Inflation ist im Personal Care Markt angekommen – dieser muss sich für die Zukunft rüsten:

Wie verhalten sich Marke und Handelsmarke zueinander?

Kann Naturkosmetik bei knappen Budgets noch wachsen?

02.11.2023 

Young Shoppers and their Funders

Die Auswirkungen auf das zukünftige Kaufverhalten mit Marleen Fuchs und Lena Eberhardt

Die junge Generation tickt anders, hat eine andere Einstellung zum Preis und möchte sich anders ernähren. Zeit für einen kurzen Ausflug in die Welt der Young Shopper?

16.11.2023 

Labels are not Private anymore

Die Erfolgsfaktoren der Handelsmarken mit Romy Meussler

Handelsmarken gewinnen immer mehr Marktanteil. Welche Veränderungen ergeben sich dadurch am FMCG-Markt? Gibt es noch den typischen Handelsmarkenkäufer? Welche Kriterien sind bei der Handelsmarken-Wahl relevant?

This Year's line Up

26.10.2023 

Who cares, who does?

Nachhaltigkeit in wirtschaftlich unsicheren Zeiten mit Andrea Wendler und Michael Wolfson

Nachhaltig zu handeln und zu planen ist unumgänglich. Doch welchen Platz nimmt die Nachhaltigkeit mit ihren verschiedenen Facetten in den aktuell unsicheren Zeiten bei den Shoppern ein? Welche Anknüpfungspunkte gibt es für Hersteller & Händler?

09.11.2023 

The End of the Veggie hype?

Warum Fleischanalog an Dynamik verliert, aber noch viel Potenzial bietet mit Nastassja Mendel und Anne Schweickhardt

Aktuell ist die Entwicklung fleischanaloger Produkte gebremst, zugleich bleibt die Kategorie hoch relevant. Welche Barrieren existieren bei den Shoppern? Wie können diese beseitigt werden, um (wieder) Wachstum zu generieren?

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https://teams.microsoft.com/l/meetup-join/19%3ameeting_M2JkNDBkNDgtM2EyZC00Zjk5LTljYzktNDZhZWUwOWIzNDhm%40thread.v2/0?context=%7B%22Tid%22%3A%2260f3f635-a520-4eb7-a859-dbc5572fc839%22%2C%22Oid%22%3A%22d880da95-5e0e-4529-a45d-3252bb8f58b0%22%2C%22IsBroadcastMeeting%22%3Atrue%2C%22role%22%3A%22a%22%7D&btype=a&role=a

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Die Erfolgsfaktoren der Handelsmarken

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links zu den Events

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Siehe Links auf Seite 2

Was ist ein Pop Up by CPS GfK Germany?

Eine spontane Vortragsreihe, insbesondere dann, wenn uns als CPS GfK bestimmte Themen oder Trends auffallen, über die es sich zu sprechen lohnt. Die 30 Minuten dienen als Inspiration und Gedankenanstoß für Ihre tägliche Arbeit.

Muss ich mich vorab anmelden?

Es ist keine Anmeldung erforderlich. Einfach zur gegebenen Zeit (immer Donnerstag von 09:30-10:00 Uhr) über das Teams Symbol auf Seite 1 oder die Links auf Seite 2 einwählen.

Erhalte ich eine Aufzeichnung oder Charts im Nachgang?

Gerne schicken wir Ihnen die gezeigten Charts zu. Wenden Sie sich dafür im Nachgang an Ihre gewohnte Kontaktperson oder die Vortragenden (Email-Adressen erscheinen am Ende). Eine Aufzeichnung wird es nicht geben.

Auf welches Land fokussieren sich die Inhalte?

Die Inhalte fokussieren sich auf Deutschland. Teilweise sind die Ergebnisse auch global verfügbar (z.B. Who cares, who does). Wenden Sie sich bei Interesse gerne an Ihre gewohnte Kontaktperson.

In welcher Sprache ist das Pop Up?

Die Pop Ups werden in deutscher Sprache gehalten.

Darf ich die Einladung Intern weiterleiten?

Unbedingt, wir freuen uns über eine rege Beteiligung.

Habe ich die Möglichkeit Fragen während des Pop Ups zu stellen?

Aufgrund der Zeit können Fragen nicht direkt geklärt werden. Wenden Sie sich dafür im Nachgang gerne an Ihre gewohnte Kontaktperson oder die Vortragenden (Email-Adressen erscheinen am Ende).





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Advanced Solutions**

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