
GfK Insight Summit 2023

Sustainability:
new consumer
demands in the
Dutch market



The limits to growth! Where did sustainability start and how is it going?

Only 35% in NL believes that oneself can make a difference



Sustainability will be the most important mega-trend for the next years!

Green bounces back as the permacrisis 'normalizes'



Top concerns NL

- | | |
|-------------------------------|-----|
| 1. Energy supply | 39% |
| 2. Economic / budget concerns | 38% |
| 3. Climate change | 36% |

Most growing concerns NL

Waste and pollution

182

People & Planet versus Profit



Large trust and awareness gap in EU when it comes to sustainability

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



“I feel that brands raised prices more than they should have”



“I can name a supermarket that does a good job for the environment”



“I can name a food / beverage brand that does a good job for the environment”



Eco-actives on the rise once more

Eco actives **do care**, and they are growing (again)

Eco Actives



Highly concerned about the environment and plastic waste.



Taking the most actions to reduce their waste.



They feel an intrinsic responsibility to be more sustainable, follow the topic more actively and have a greater awareness.



Eco-actives **back to growth** everywhere in Europe



In NL, around **29%** of all households cares and acts. NL is **6th** “greenest” country in EU.



The NL eco-shopper represents **20%** of total FMCG value. For plantbased meat this is **42%** and for plantbased dairy **46%**.

Buying frequency and volume in decline of plant based alternatives

Temporary **downtrading** or other **headwinds**?



Vol index NL ytd Q2 23 vs ytd Q2 22: **94%**
Same for meat: **100%**



Vol index NL ytd Q2 23 vs ytd Q2 22: **98%**

Challenges: consumer perception, ultra-processed is not natural, health benefits, sugar, taste.

The Flower Farm: sustainable growth, it is possible



Since introduction Q1 2020

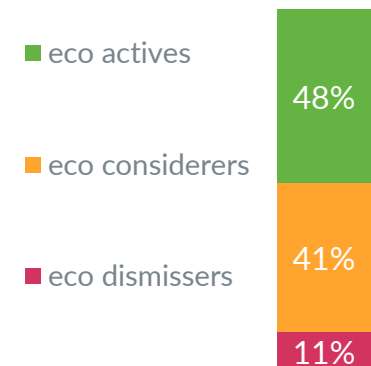
- BOUGHT BY 20% OF THE DUTCH HOUSEHOLDS

- REPEAT RATE 60%



Value share growth eco-actives +10%

Value shares



2023

Sustainability in Tech&Durables enter the next level & differentiate



Consumer

Sustainability remains a resilient consumer value – despite all disruptions.

Climate change as a main concern keeps on rising, esp. among 60+ age group

Market

Sustainability claims can be a differentiator.

It is yet difficult to prove a price premium paid solely for sustainability without a clear additional saving (via durability, energy efficiency...)

Brands

Pivoting brand equity towards sustainability is crucial for many brands.

As eco-images are not yet developed in consumers minds, fast movers will reap the benefits.

Legislation

Legislative pressure is up and expected to further gear up in the coming years.

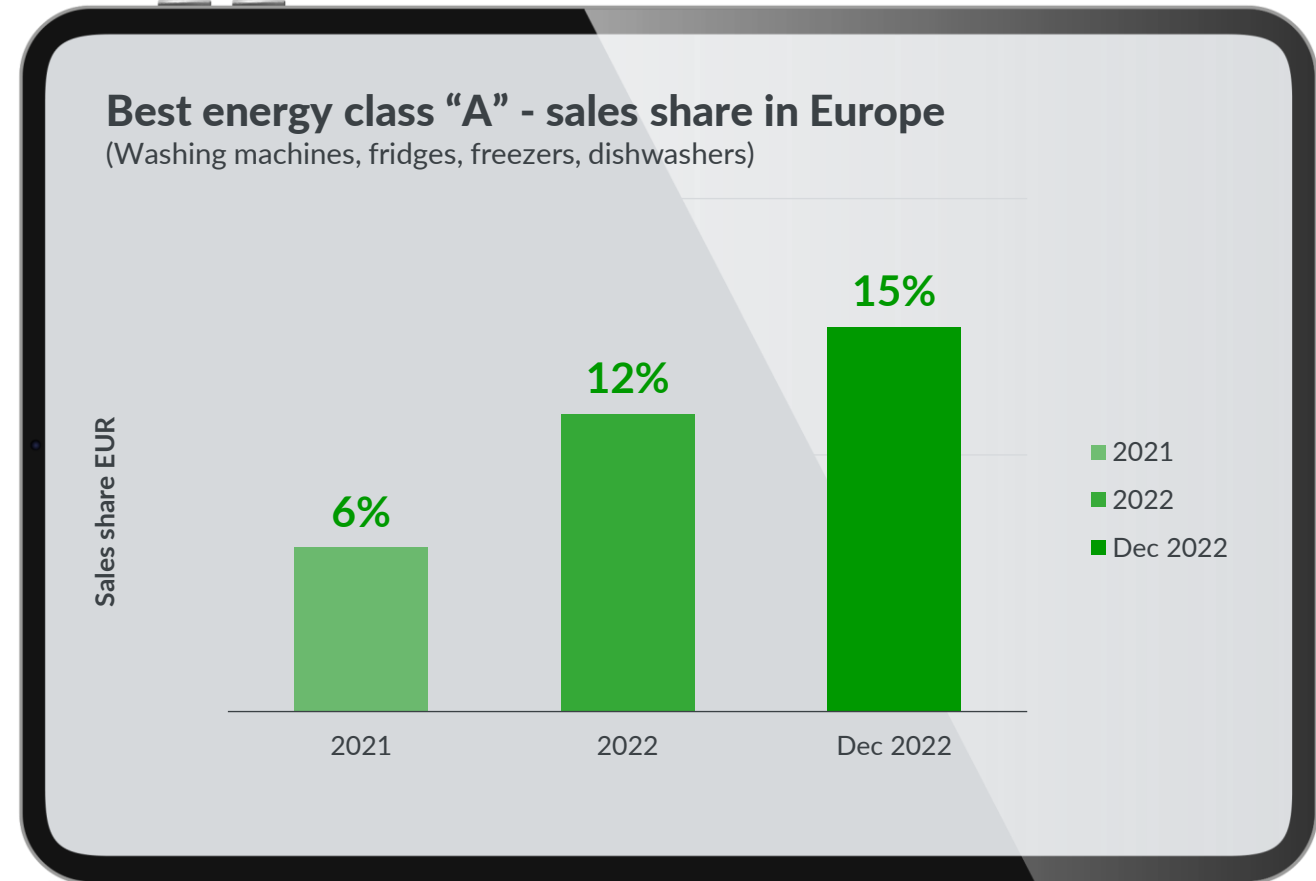
Consumers care about energy efficiency

Growing attitude towards sustainability in Buying behaviour



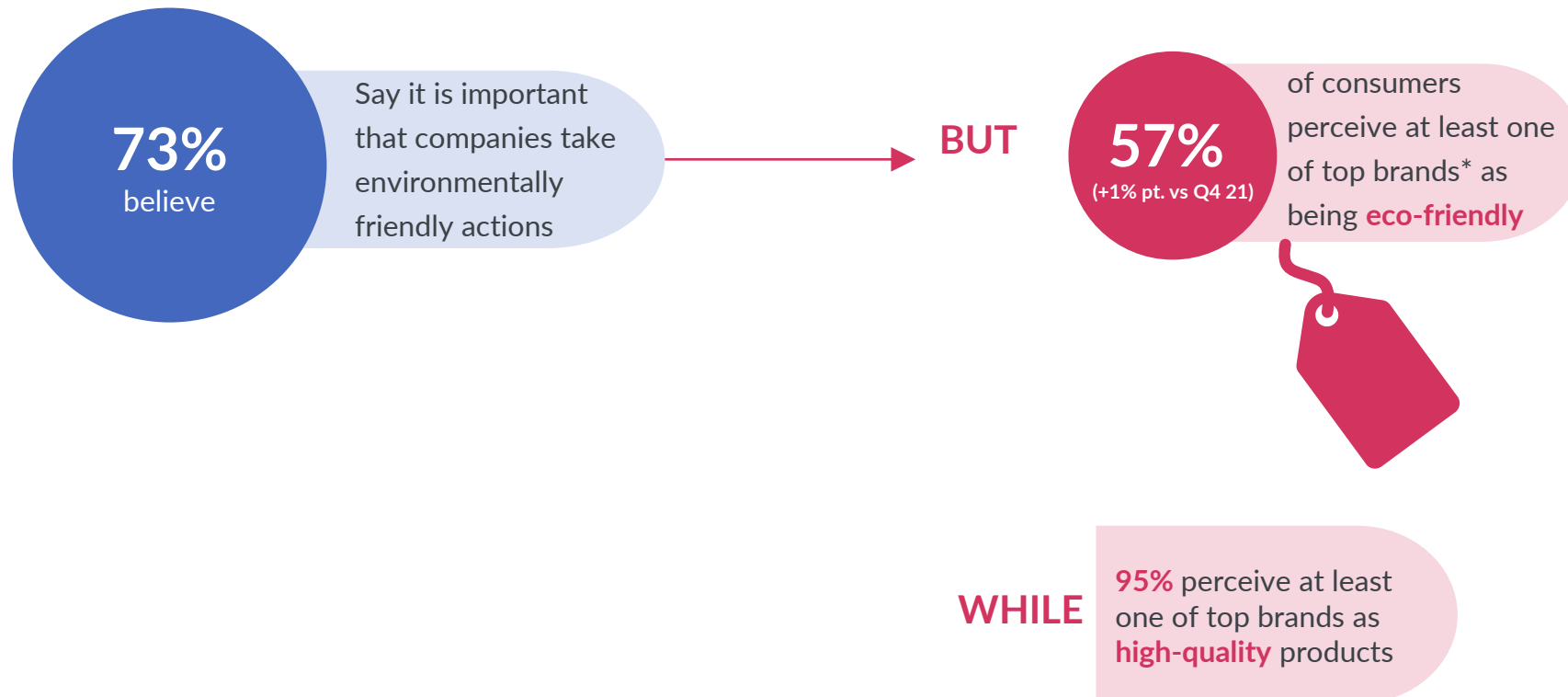
The new energy label (introduced in March 2021 in the EU) remains a **pivotal anchor point** for consumers' decision making.

- Sales share of “A-class” more than doubled in one year
- In certain categories/countries the share of “A-class” is above 60%
- Prices for best in class energy label products become more affordable



The sustainability gap

Awareness and trust remains a key challenge & opportunity

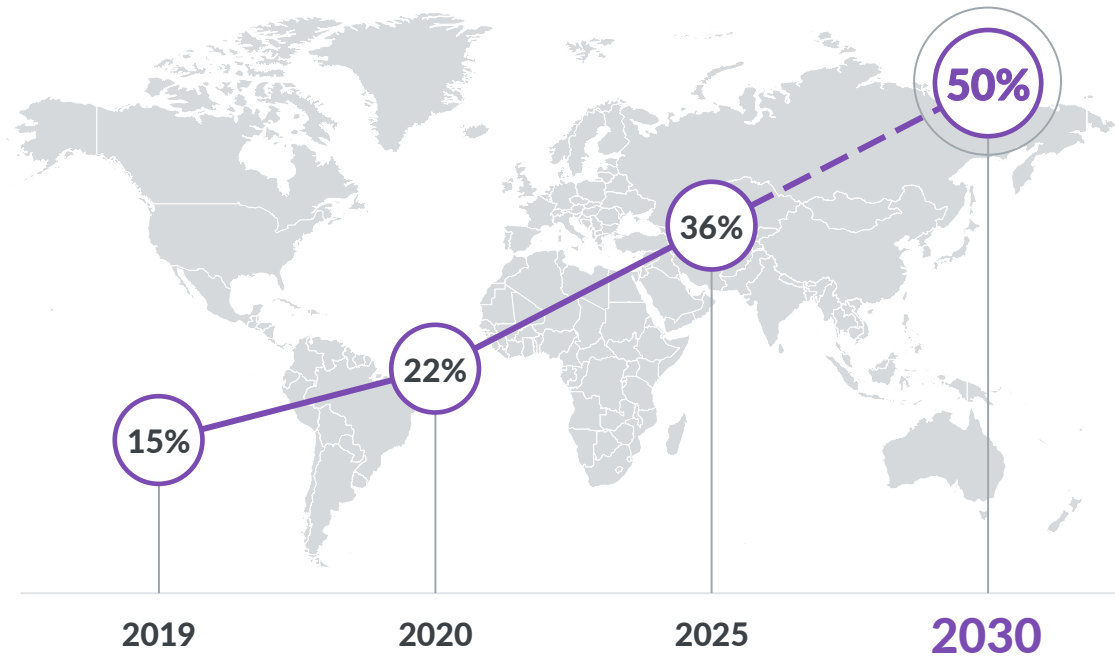


Sustainability has reached maturity

It is no longer a question of IF or WHEN but HOW



By 2030, 50% of global population will be eco-active!



Eco-actives' revenue potential 2030

