



## FIFTY SHADES OF GREEN THE CONSUMER & SUSTAINABILITY

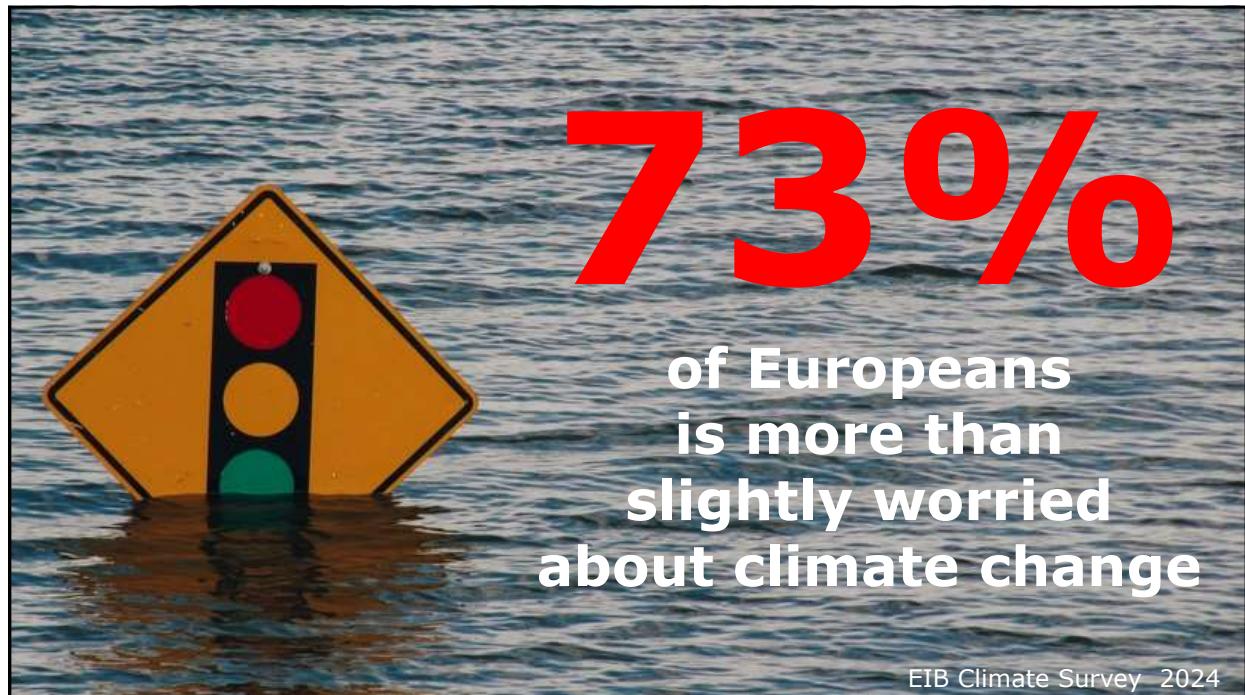
PROF. GINO VAN OSSER



1



2



EIB Climate Survey 2024

3

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**TRAVEL WEEKLY**

NEWS IN DEPTH DESTINATIONS MEDIA COMPETITIONS JOBS EVENTS TRAVEL WEEKLY HUB LATEST EDITION

Travel Agents Tour Operators Cruise Air Accommodation Touring & Adventure People Finance Regulation

**European airports surpass pre-Covid passenger levels**

Feb 12, 2025 07:32 GMT by Phil Davies

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**16\***  
Sweet  
COMMISSION

Book a package  
Blank a ~~free~~ comission!

EXCLUSIVE

**Most Popular / Latest**

**Cruise**  
Agent racks up £330,000 in P&O Cruises bookings in three days

**Travel Agents**  
Kelly Cookes to leave Advantage for InteleTravel

<https://destinations720.com/look/2025/02/06/0730-of-europeans-worried-about-climate-change>

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1



## THE CONSUMER EXPOSED

5



brown consumer  
(the minority)



light green consumer  
(the majority)



dark green consumer  
(a niche)

6



dark green consumer  
(a niche)



**fear → control**

7

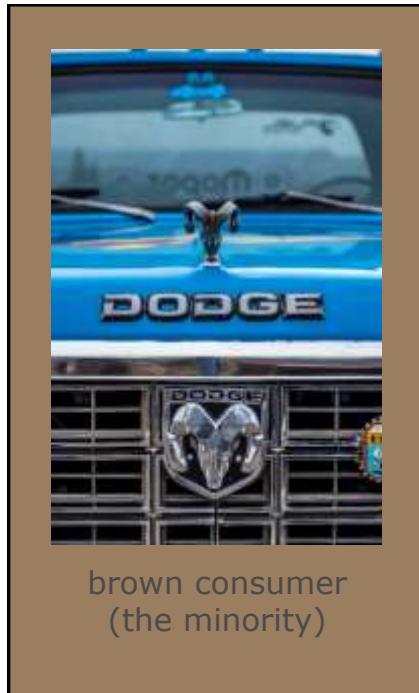


dark green consumer  
(a niche)



**fear → control**

8



brown consumer  
(the minority)



**indifferent or negative**

9



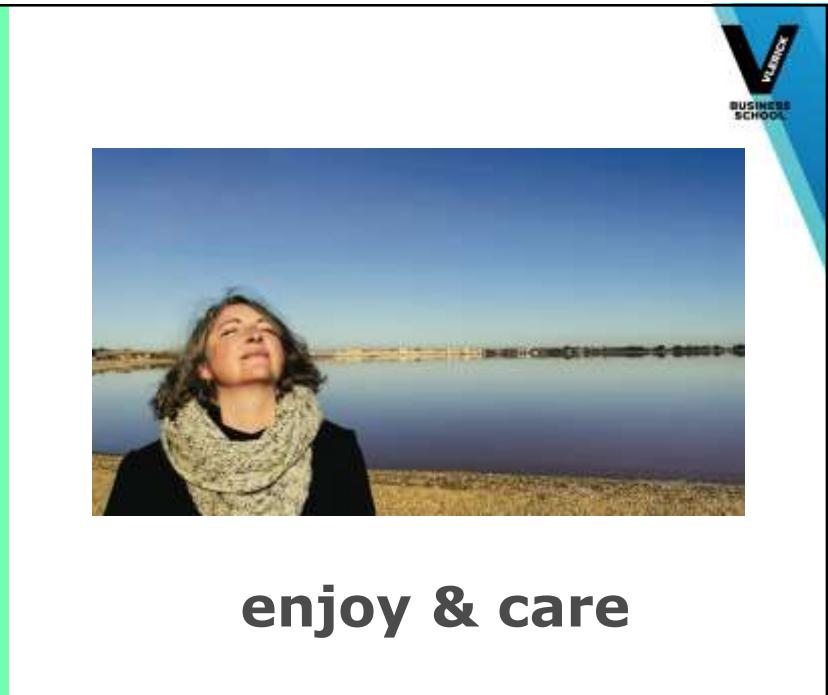
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11



12



light green consumer  
(the majority)

**enjoy & care**

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**CUSTOMER VALUE EQUATION**

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McKinsey & Company NielsenIQ



**“tracking dollars instead of sentiment”**



**V  
Vlerick  
BUSINESS SCHOOL**

**Consumers care about sustainability—and back it up with their wallets**

A joint study from McKinsey and NielsenIQ examines sales growth for products that claim to be environmentally and socially responsible.

This research is a collaborative project between McKinsey and NielsenIQ and is based on NielsenIQ's Consumer Manufacturing & Consumer Packaged Goods practices.

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**600,000 product SKU's  
44,000 brands**

**32 categories in food, beverage, personal care & household**

**93 claims reduced to 6 types: animal welfare, environmental, organic, plant based, social responsibility and sustainable packaging**

**5 years ('17-'22) in the US**

**“Consumers care about sustainability—and back it up with their wallets”, McKinsey Feb '23 (analysis by NielsenIQ based on actual sales of 600,000 SKU's in the US – cumulative growth 2017-2022)**

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**FMCG products  
with a sustainability  
claim grow**

**40%**

**faster than  
those without**



"Consumers care about sustainability—and back it up with their wallets", McKinsey Feb '23  
(analysis by NielsenIQ based on actual sales of 600,000 SKU's in the US – cumulative growth 2017-2022)

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## **CUSTOMER VALUE EQUATION**



$$\text{customer value} = \frac{\text{functional \& emotional benefits}}{\text{price + effort}}$$

18

Marcel's  
**GREEN SOAP**  
TODAY • TOMORROW • CLEANING

Search    

PRODUCTS STORY FRAGRANCES SUSTAINABLE SOAP BLOG STORE LOCATOR

**20% OFF PALM OIL FREE PRODUCTS**  
Try our palm oil free products with a discount!  
**SHOP NOW**

20% off palm oil free products



• FEEL • GOOD • CLEANING •

BEST SELLERS



19

**THE 3 PROMISES:**

Marcel is always working to make sure that he can keep his three promises: Marcel's Green Soap smells wonderful, works fantastically and is very friendly.

**1 ➔ SMELLS WONDERFUL**  
 • Fragrance from nature  
 • Unique combinations  
 • Lasts for a long time

**2 ➔ WORKS FANTASTICALLY**  
 • Clean power  
 • Rich foam  
 • Gentle and caring

**3 ➔ ECO-FRIENDLY**  
 • Plant based soap  
 • Vegan  
 • Recycled bottles

**UNIQUE, PLEASANT SCENT**   *Makes cleaning fun and relaxing.* 

**LATEST FROM MARCEL**

**NEW!**  
Marcel introduces his new palm oil-free Laundry Detergent!



**MARCEL'S INTRODUCES PALM OIL-FREE LAUNDRY DETERGENT**  
 After several months of intensive testing and development, the time has come: Marcel introduces

**hand wash or dish-washer?**  
 We are all thinking more and more about making sustainable choices at home. We separate our

**WHAT TO DO WITH THE LAST PIECES OF YOUR SOAP BAR?**  
 If you've been using a plastic-free shampoo bar or shower bar in the shower for some time, you

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## CUSTOMER VALUE EQUATION



clean  
smell

97%  
biodegradable

functional & emotional benefits

customer value =

price + effort

= =



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## CUSTOMER VALUE EQUATION



light green consumer  
(the majority)

=  
clean  
smell

+  
I like 97%  
biodegradable

functional & emotional benefits

price + effort

= =

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## CUSTOMER VALUE EQUATION



=  
clean  
smell

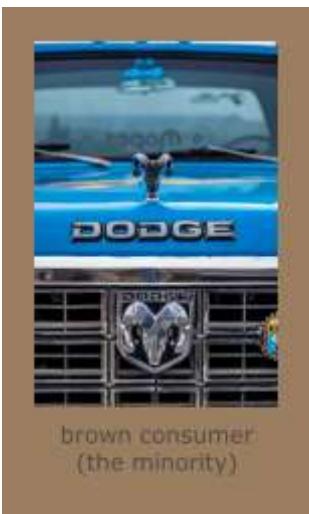
**I want 100%  
biodegradable**

**functional & emotional benefits**

**price + effort**  
+ +

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## CUSTOMER VALUE EQUATION



-?  
clean  
smell

?

**functional & emotional benefits**

**price + effort**  
= =

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# 3



## HOW ABOUT YOU ?

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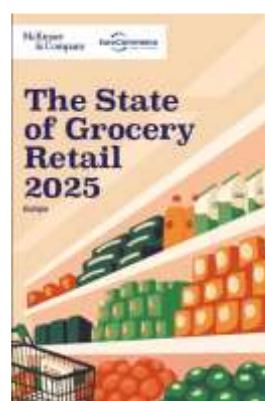
### A VERY SPECIFIC CONTEXT...



**mass,  
not niche**



**high  
involvement**



**indirect  
sales**



**strategic  
category**

26

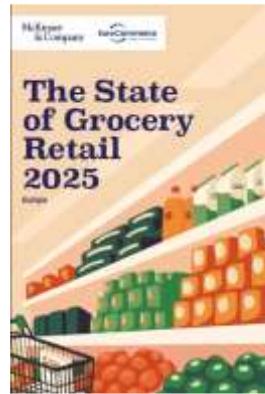
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indirect  
sales



strategic  
category

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### French baguette gets Unesco heritage status

30 November 2022

Flora Drury  
BBC News

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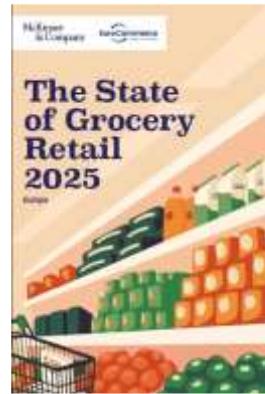
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29

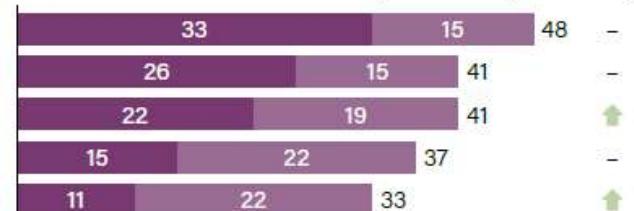
## TOP 15 TREND MENTIONED BY CEO'S



■ Top 1-3 trends ■ Top 4-7 trends

▲▼ Increase/ decrease of ranks compared to last year's survey

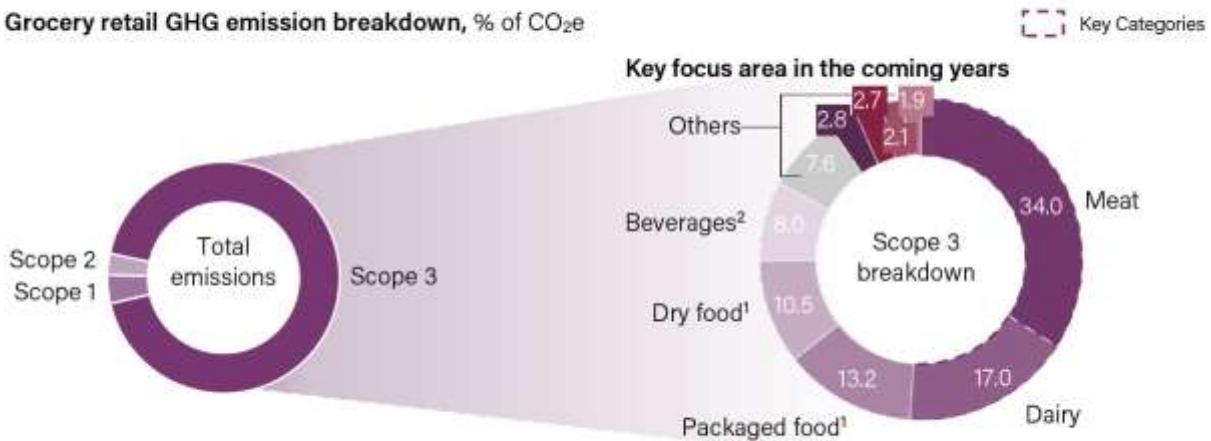
- ① Cost and margin pressure
- ② Downtrading of consumers
- ③ IT modernization
- ④ Private label
- ⑤ Supply chain disruption and availability



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**The equation for Scope 1 and 2 is directionally solved and accounts for a minor share of emissions, while Scope 3 remains a key issue.**

Grocery retail GHG emission breakdown, % of CO<sub>2</sub>e



<sup>1</sup> Processed meat, processed seafood and others (pizza, ready meals, soups, etc.).

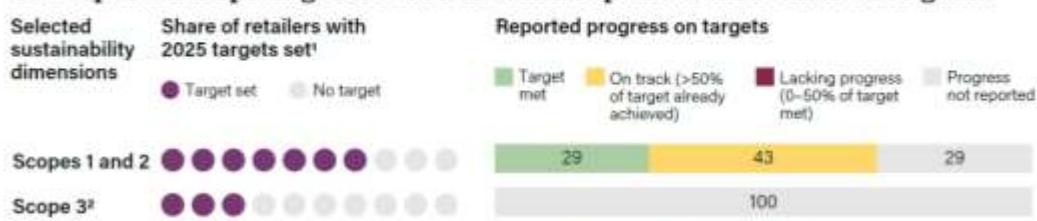
<sup>2</sup> Both alcoholic and soft beverages.

Source: Euromonitor; Poore & Nemecek

The State of Grocery Retail 2023 (McKinsey & EuroCommerce)

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**The top ten European grocers are on a final sprint to meet their 2025 goals.**



Note: Top 10 European grocery retailers: Schwarz Group, ALDI Süd, Ahold Delhaize, Tesco, Edeka, Rewe, Leclerc, Carrefour, Sainsbury, Casino.

<sup>1</sup> Some of the retailers have multiple targets per category. <sup>2</sup> Including supplier goals.

Source: Company sustainability reports; company websites

<sup>1</sup> The top ten European grocers are Schwarz Group, ALDI Süd, Ahold Delhaize, Tesco, Edeka, Rewe, Leclerc, Carrefour, Sainsbury, and Casino; Euromonitor, accessed February 2024.

<sup>2</sup> Scope 1 is direct emissions generated by an organization. Scope 2 is emissions generated by production of purchased energy. Scope 3 is indirect emissions from up and down the value chain.

<sup>3</sup> Scope 3 refers to all greenhouse gas emissions that happen in the value chain before or after grocery retailers (that is, suppliers and consumers).

<sup>4</sup> Regenerative agriculture includes farming and grazing practices that improve soil health, crop resilience, nutrient density, water management, and biodiversity, as well as the livelihoods of farmers.

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Ahold Delhaize     About     Our brands     Sustainability     News     Investors     Careers     [Search](#)

[Back to the newsroom](#)     PRESS RELEASE     Ahold Delhaize achieves AAA MSCI ESG Rating



Zoetermeer, the Netherlands, August 8, 2021 – Ahold Delhaize is proud to share that its MSCI ESG rating has been upgraded to AAA, coming from an AA rating. MSCI is a prominent benchmark in the sustainable financing world. As triple-A is the highest scoring range, the Ahold Delhaize, this indicates that it is a leader in its industry in managing the most significant ESG challenges and opportunities.

Ahold Delhaize CEO Frans Muller comments, "As MSCI's ESG rating is a primary research tool and a widely used benchmark by investors, Ahold Delhaize's ranking upgrade will help investors to understand the importance we place on the transformation to a healthy and sustainable food system and being a business that is fit for the future."

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**V**  
VERITAS  
BUSINESS SCHOOL

**"To solve for net zero, I expect brand owners to address their Scope 1 and 2 emissions."**

**Ole Robert Reitan**  
CEO, Reitan Retail

Reitan Retail employs more than 43,000 people and has a network of 3,850 grocery, convenience, and mobility stations across seven countries, including Norway, Denmark, Sweden, Finland, and the Baltic states.

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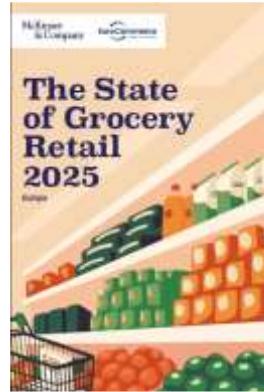
## A VERY SPECIFIC CONTEXT...



mass,  
not niche



high  
involvement



indirect  
sales



strategic  
category

35



36



37



38

## CUSTOMER VALUE EQUATION



SUSTAINABLE  
WHEAT INITIATIVE  
EUROPE

$$\text{functional \& emotional benefits} = \boxed{\text{price} + \text{effort}}$$

A diagram illustrating the Customer Value Equation. On the left, the Sustainable Wheat Initiative Europe logo is shown. To its right is an equals sign. To the right of the equals sign is a box containing the text "functional & emotional benefits" above a horizontal line, and "price + effort" below it. A large red arrow points upwards from the "price + effort" text towards the line.

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A screenshot of the Better Chicken Commitment website. The header features a navigation bar with links for US, UK, EU, CA, AU/NZ, and BR. Below the header, there is a logo for "BETTER CHICKEN COMMITMENT" and a menu with links for COMMITMENTS, WHY THE BCC?, THE POLICY, SUPPLIERS, FAQ, SCIENCE, and CONTACT. The main content area features a large image of a white chicken. The text "THE BETTER CHICKEN COMMITMENT" is prominently displayed. Below this, a paragraph states: "The Better Chicken Commitment is the leading set of standards for broiler welfare driving the food industry towards higher welfare practices." A large white space is visible at the bottom of the page.

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# Biologische vleeskip

5½ week oud  
940 gram

# Plofkip

5½ week oud  
2.900 gram



41



[ABOUT THE LABEL](#)
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Consumers
Business

Home > What is the Better Life label?

## What is the Better Life label?

The Better Life label scheme uses a star rating to indicate the animal welfare of the animals used for livestock for the production of meat, eggs and dairy produce. The higher the number of stars, the more attention is given to animal welfare. The following table shows the exact criteria per animal species that are applicable for livestock farmers and producers.

The Better Life label scheme was founded in 1997 by the Dutch Society for the Protection of Animals (Dierenbescherming). As the first chain-wide scheme, it is now used by many companies in the food chain. The Better Life label is a chain-wide scheme, which means that in addition to livestock farmers, the entire food chain, including processors, importers, exporters, etc. must also be inspected and certified. For more information on inspection and audit, see the [Suppliers page](#).

as of 2023: **only "1 star Better Life" chicken in Dutch supermarkets**

The Dutch Society for the Protection of Animals is the founder and owner of the Better Life label. In this capacity it establishes the criteria relating to animal welfare which must be complied with by the participating companies. In addition to this, the Better Life label Foundation was founded in 2012. The Better Life label Foundation is the private certification organisation responsible for correctly assuring the Better Life label and for communication with the business sector. For more information about the Better Life label Foundation click [here](#), for more information about our organisation click [here](#).

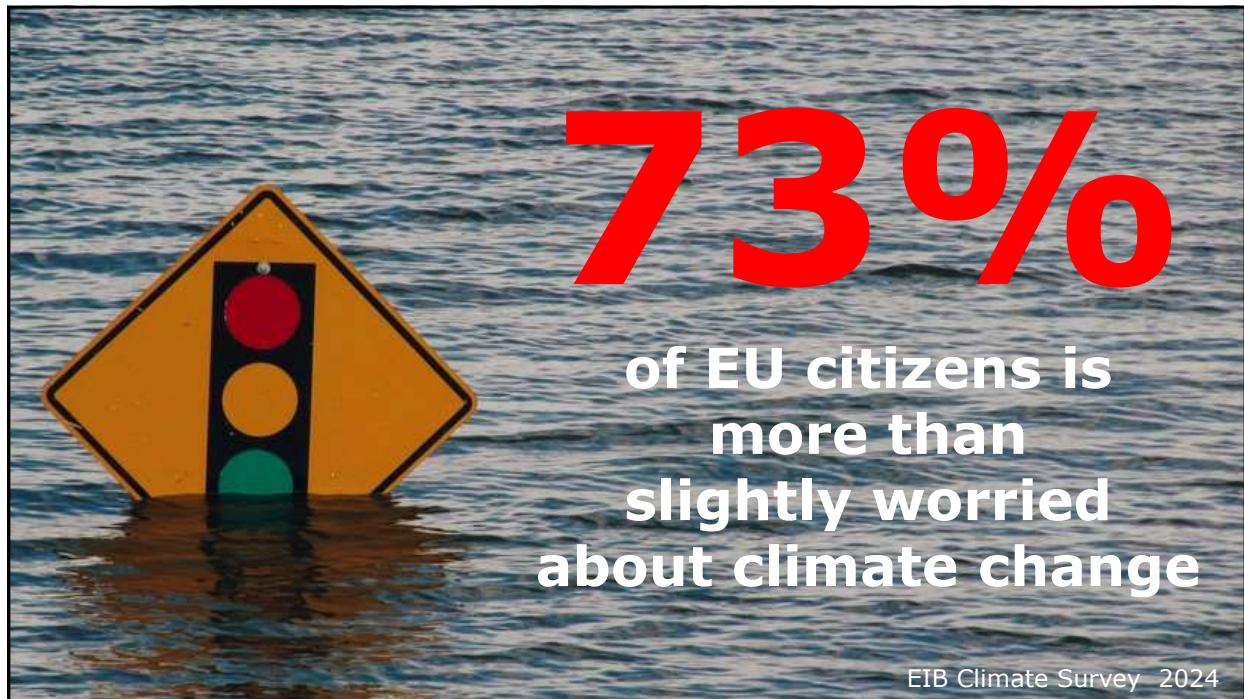
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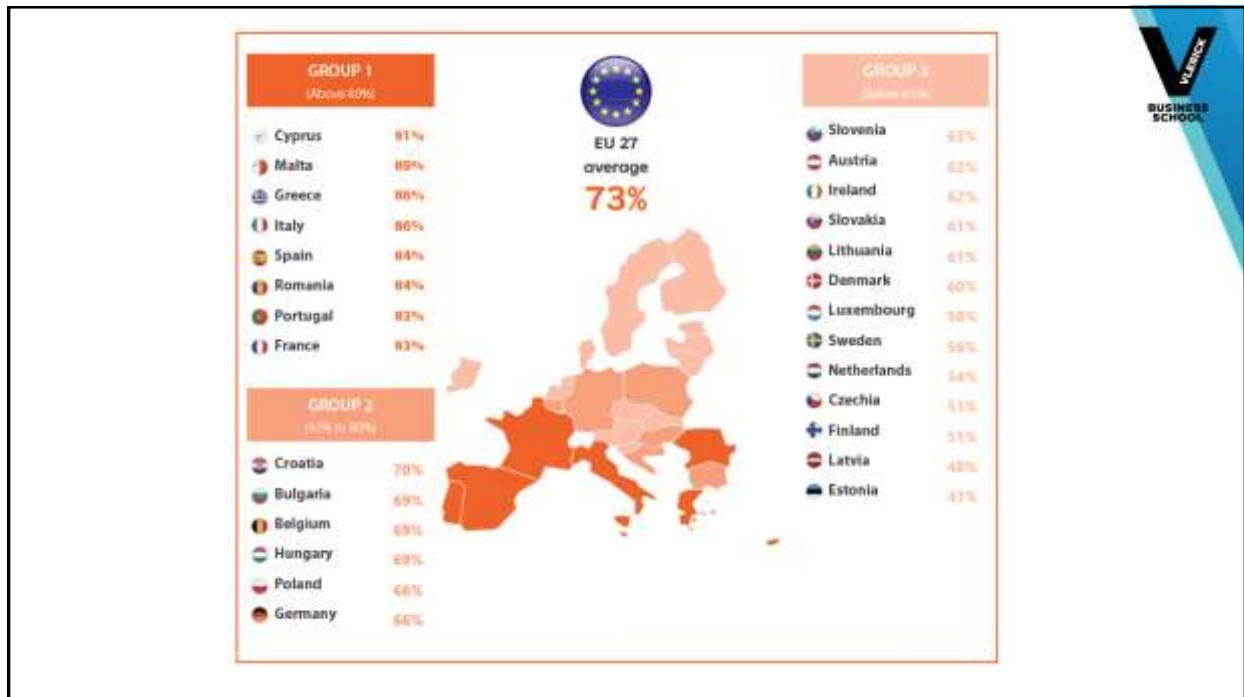
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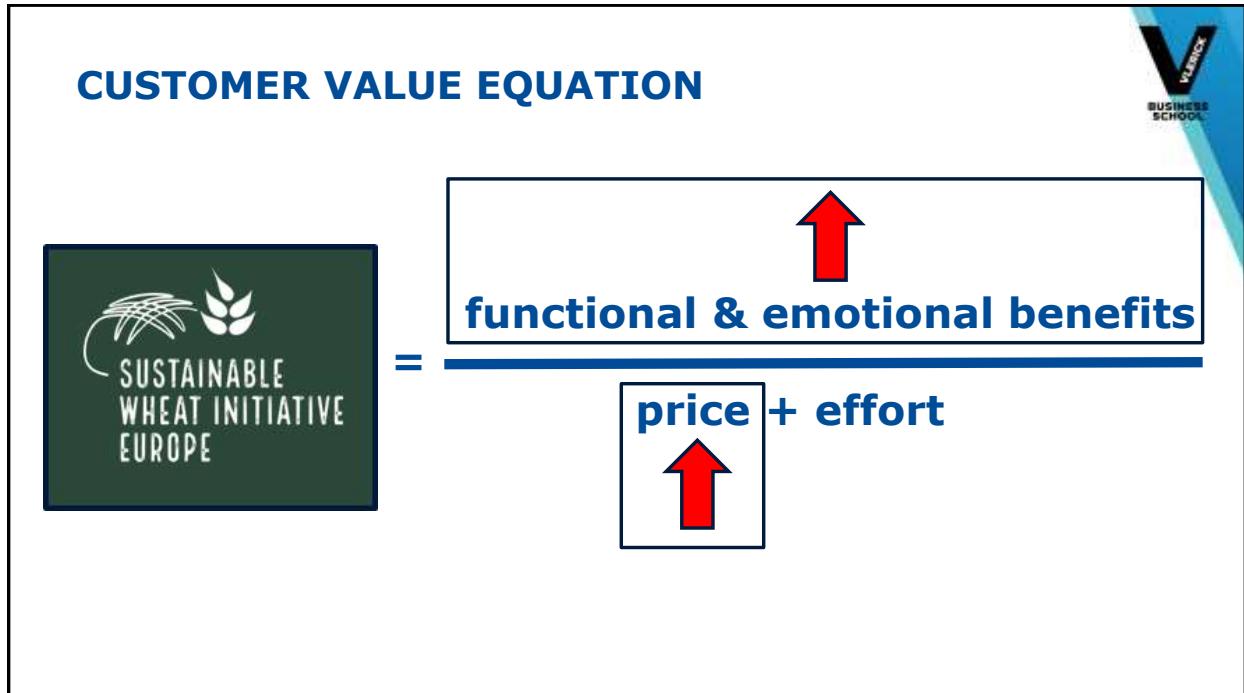
**Why were the floods in Spain so bad?**

Cars piled up in the street with others

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**31%**

**“focus on healthy eating and nutrition”**

Net intent: % willing to do more minus % to do less | N=14,543  
The State of Grocery Retail 2025 (McKinsey & EuroCommerce)

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**16%**

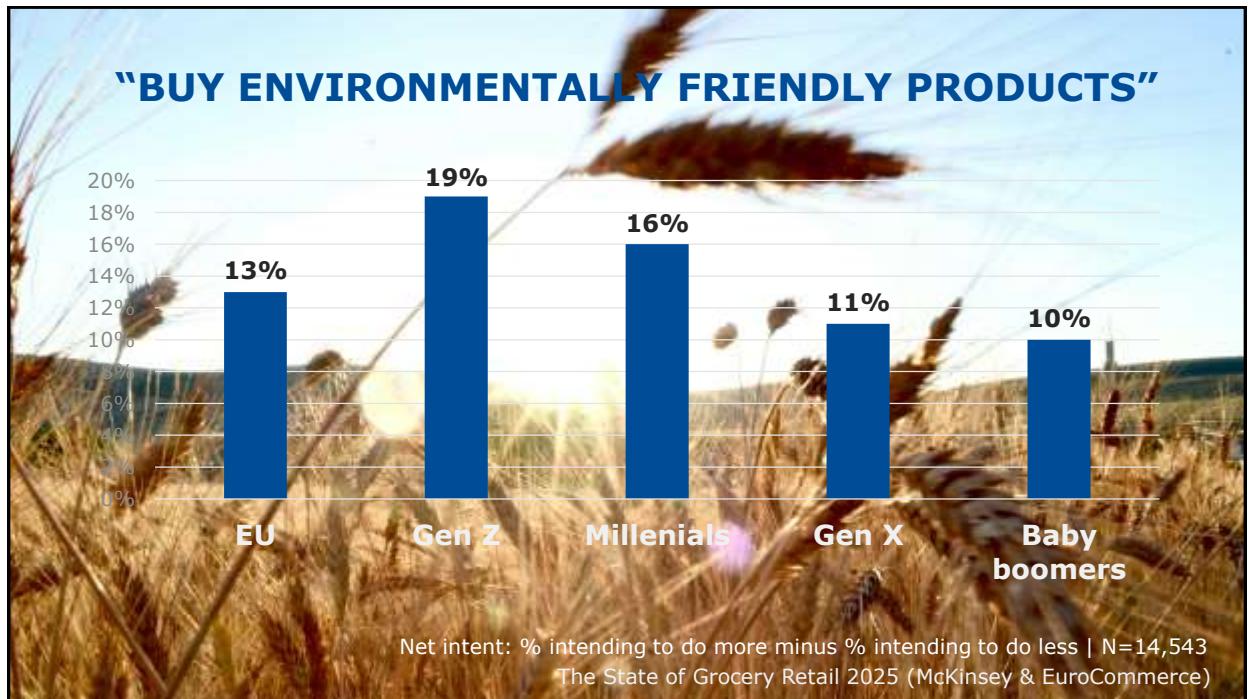
**“buy products from local producers & farmers”**

Net intent: % intending to do more minus % intending to do less | N=14,543  
The State of Grocery Retail 2025 (McKinsey & EuroCommerce)

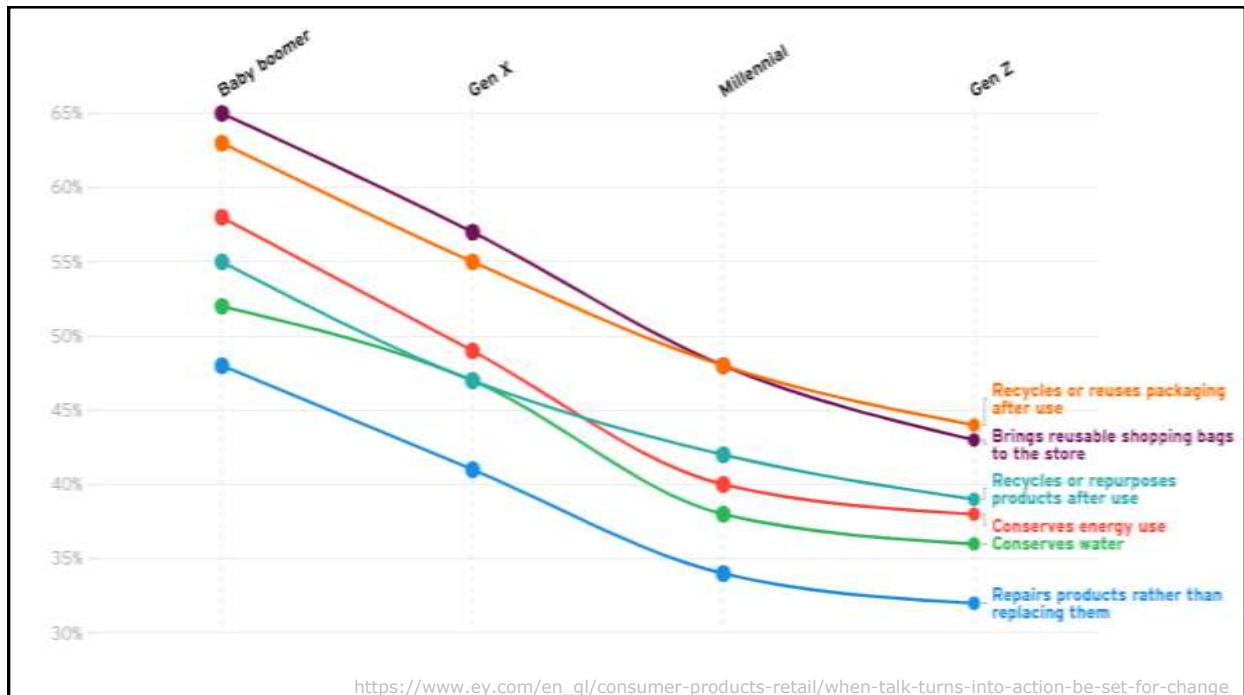
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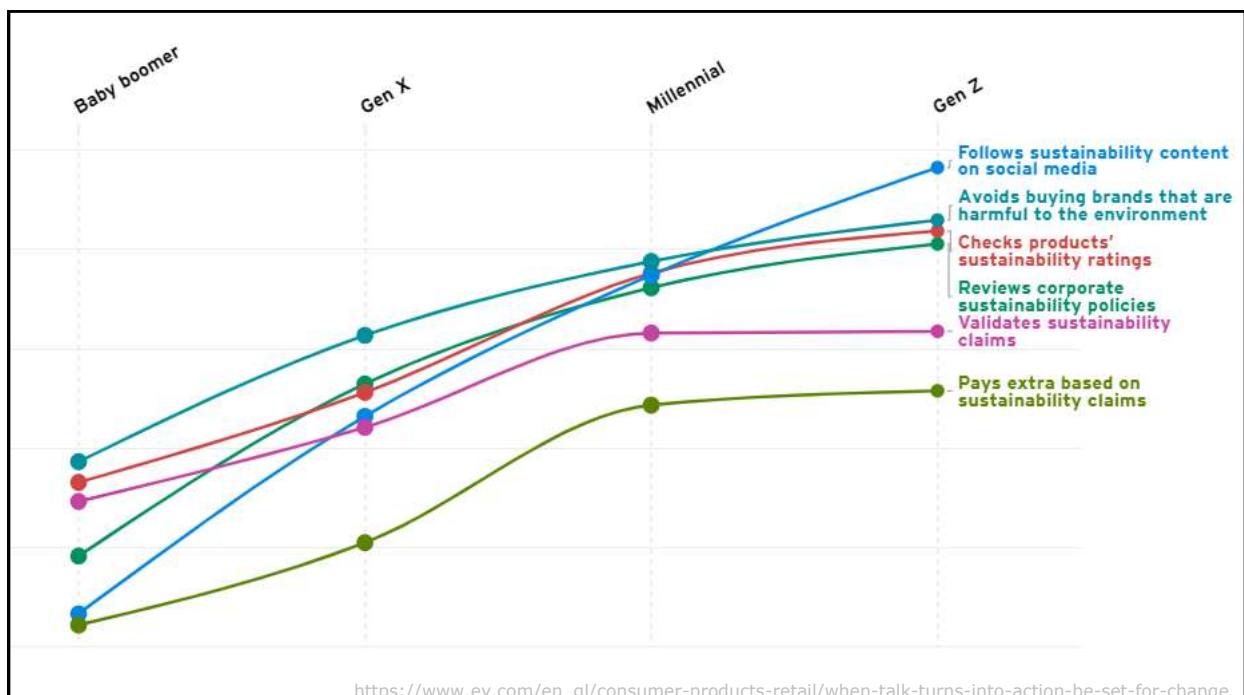
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# 5



## CONCLUSION

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**FMCG products  
with a sustainability  
claim grow**

**40%**

**faster than  
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"Consumers care about sustainability—and back it up with their wallets", McKinsey Feb '23  
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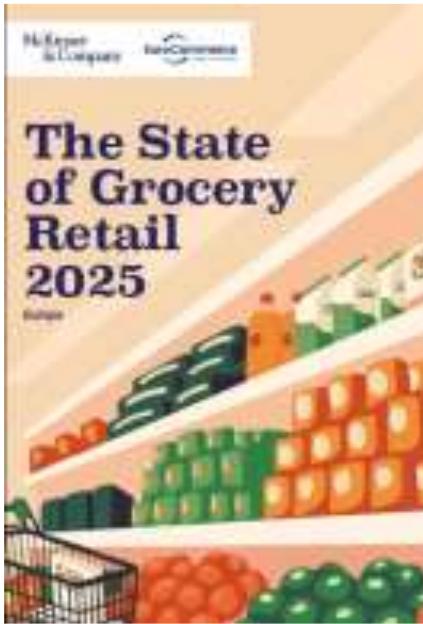


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## CUSTOMER VALUE EQUATION



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the retailer !!!



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# may the force be with you



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**Prof. Gino Van Ossel**

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