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Consumer Insights on Sustainability

SUSTAINABLE WHEAT INITIATIVE EUROPE

June 5th 2025

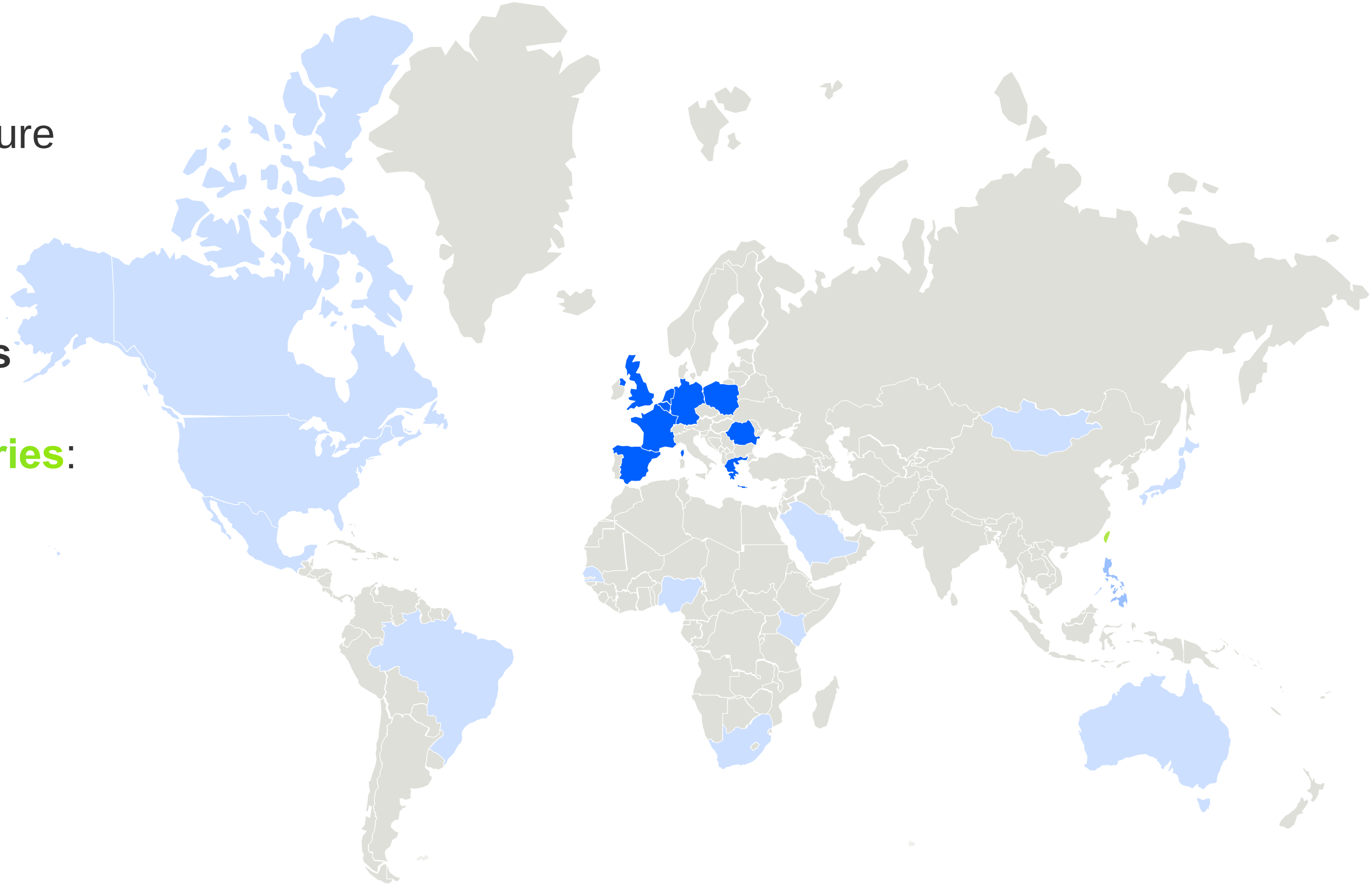
Kantar's Sustainability Sector Index

Objective: to assess **where companies in different industry sectors can credibly play** to ensure relevance to consumers

In 2025, SSI offers a consistent foundational understanding of sustainability **across 22 countries**

For today, we have focused on 9 European countries:

Belgium
France
Germany
Greece
Netherlands
Poland
Romania
Spain
United Kingdom



EU sample: **1000+ interviews** per country
Online fieldwork in October 2024

2025 coverage: 42 sectors, including Bread & Bakery and Packaged Biscuits & Cakes and Super-/hyper-markets

Beer, wine and alcoholic beverages	Alcohol
Financial services, banking, and insurance	Financial Services
Confectionery (Chocolate, sweets, etc.) **UPDATED**	Food & Beverages
Coffee **UPDATED**	Food & Beverages
Fast food/casual restaurants	Food & Beverages
Flavoured beverages	Food & Beverages
Bottled water	Food & Beverages
Packaged biscuits, packaged cakes **UPDATED**	Food & Beverages
Crisps, savoury snacks **UPDATED**	Food & Beverages
Milk, cream, butter, yogurts, cheese **NEW**	Food & Beverages
Dried pasta, rice, noodles, couscous, etc. **NEW**	Food & Beverages
Ready meals **NEW**	Food & Beverages
Bread and bakery products **NEW**	Food & Beverages
Pet food	Pet Food
Over-the-counter medicine, pharmaceutical products **UPDATED**	Health
Cleaning and home care products	Household cleaning
Laundry, washing detergent and fabric care	Household cleaning
Oil and gas (including petrol / diesel)	Oil and Gas
Energy providers	Home
DIY and Home improvement stores and products **NEW**	Home
Property to buy or build	Home

Cars **UPDATED**	Mobility
Tyres **NEW**	Mobility
Travel (airlines, railways, cruise lines, etc.) **UPDATED**	Mobility
Cosmetics make-up	Personal Care
Skin care	Personal Care
Personal Care (e.g. oral hygiene, shampoo, etc.)	Personal Care
Online shopping sites	Retail
Drugstores NEW	Retail
Supermarkets/hypermarkets/department stores	Retail
Delivery services (post, parcel, food, etc.) **NEW**	Service
Hospitality (hotels, accommodations, etc.) **UPDATED**	Service
Out of home entertainment (e.g. theatres, amusement parks) **NEW**	Service
Big technology companies (e.g. Google, Microsoft, Facebook, Amazon, Nvidia, etc.) **NEW**	Tech, Media
News media (e.g. newspapers, magazines, television, radio, social media) **NEW**	Tech, Media
Electronics devices (smartphones, TVs, computers, cameras, etc.) **UPDATED**	Tech, Media
Large household appliances such as refrigerators, washing machines, etc. **UPDATED**	Tech, Media
In-home entertainment	Tech, Media
Telecom service providers (fixed line, internet, mobile)	Tech, Media
AI Tools **NEW**	Tech, Media
Clothing and footwear	Fashion
Luxury products	Fashion

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Categories removed vs. 2023 are ‘Fruit and vegetables’, ‘Meat ‘, ‘Protein products ‘, ‘Milk or Dairy products’, ‘Non-dairy milk or non-dairy product alternatives’, ‘Toys and games ‘, ‘Electric / hybrid vehicles’, ‘Motor vehicles’, ‘Car-based mobility services’, ‘Hygiene products for babies’, ‘Furniture / home furnishing’, ‘Hygiene products’, ‘Specialist retailers’, ‘Cigarettes’, ‘Vaping’, ‘Social media’

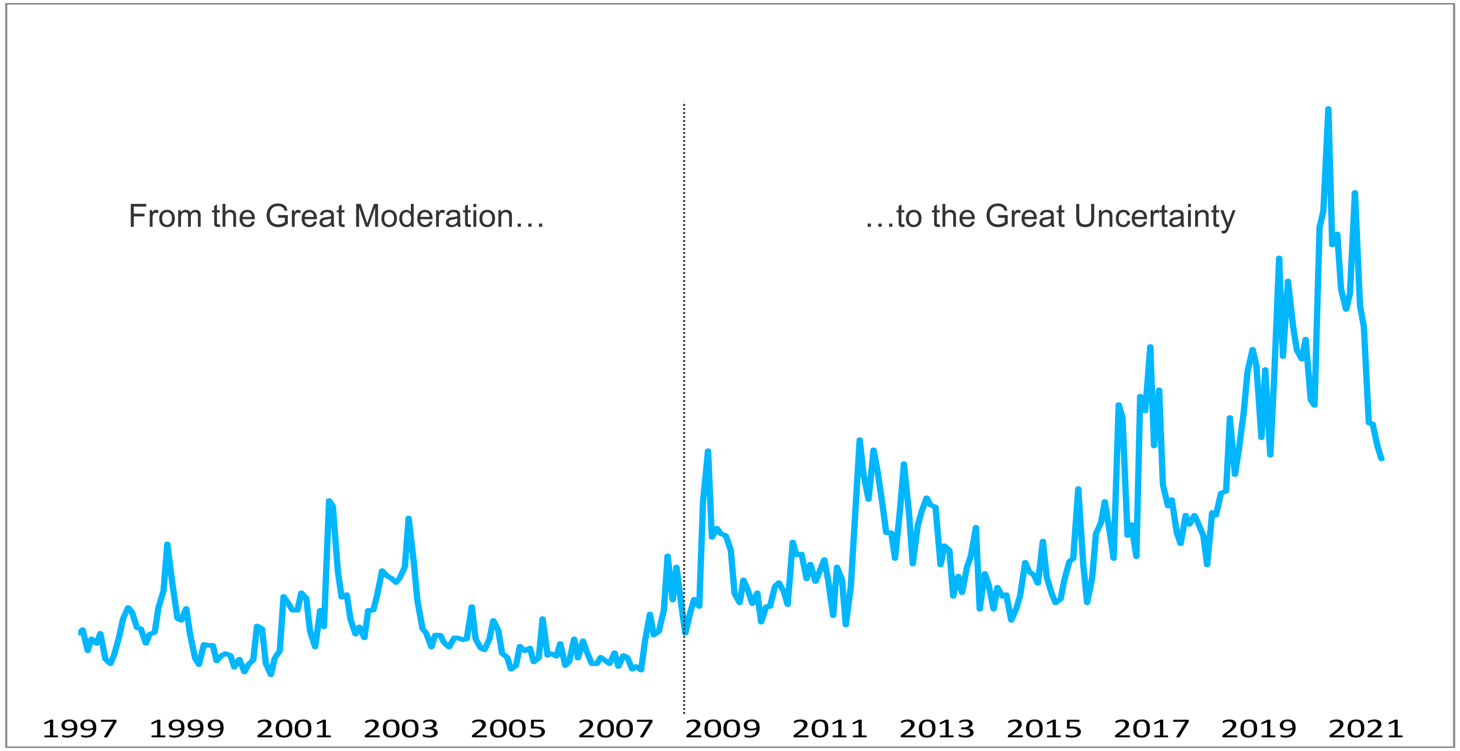
1. Do consumers care about sustainability ?
2. What are the sustainability topics they care about?
3. Are consumers ready to pay for sustainable products ?
4. How can the sector and retailers demonstrate leadership?

1.
Do consumers care about sustainability ?

Disruption is the new normal

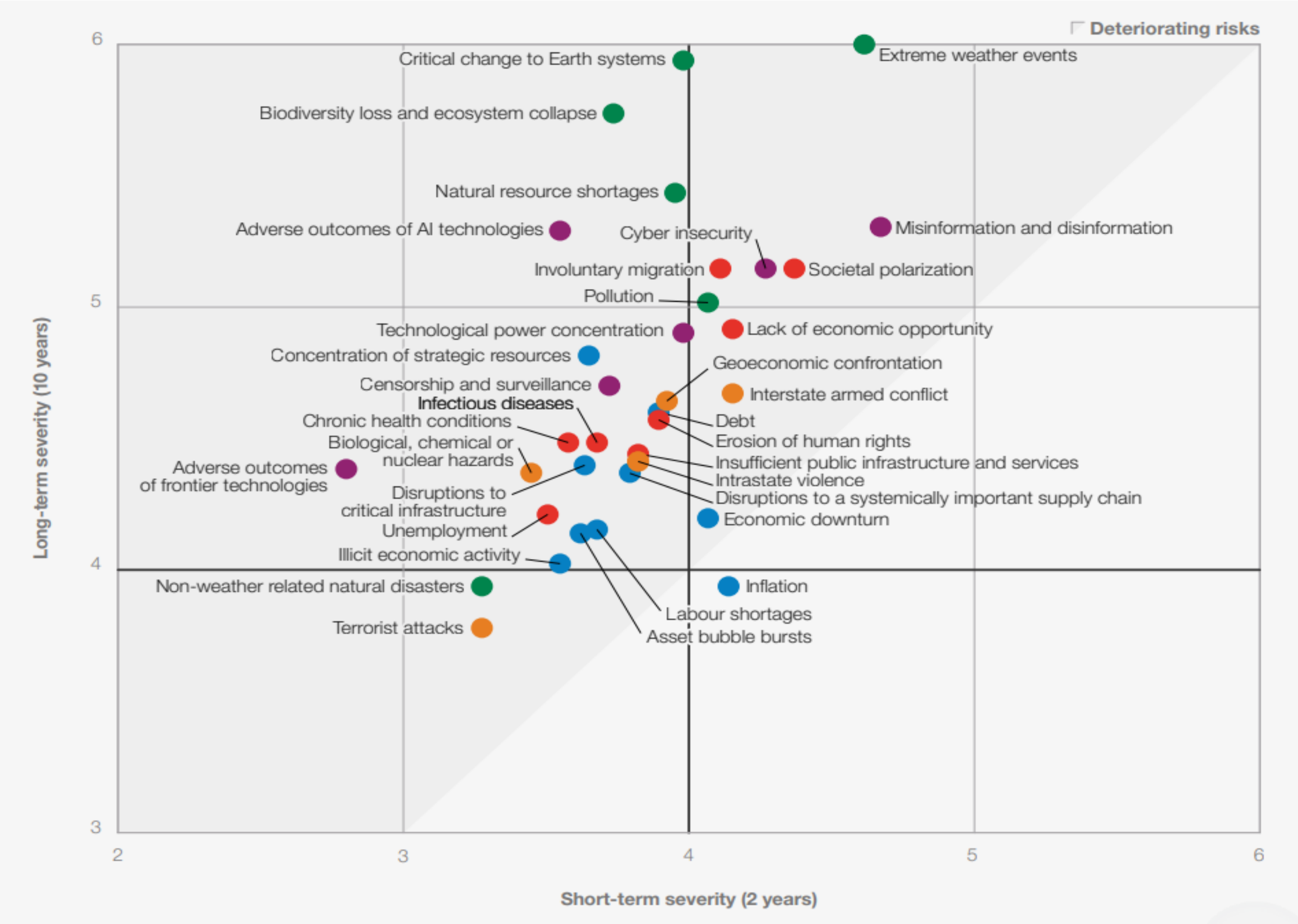
The great uncertainty

Global economic policy uncertainty index



Disruption will be fueled by climate change

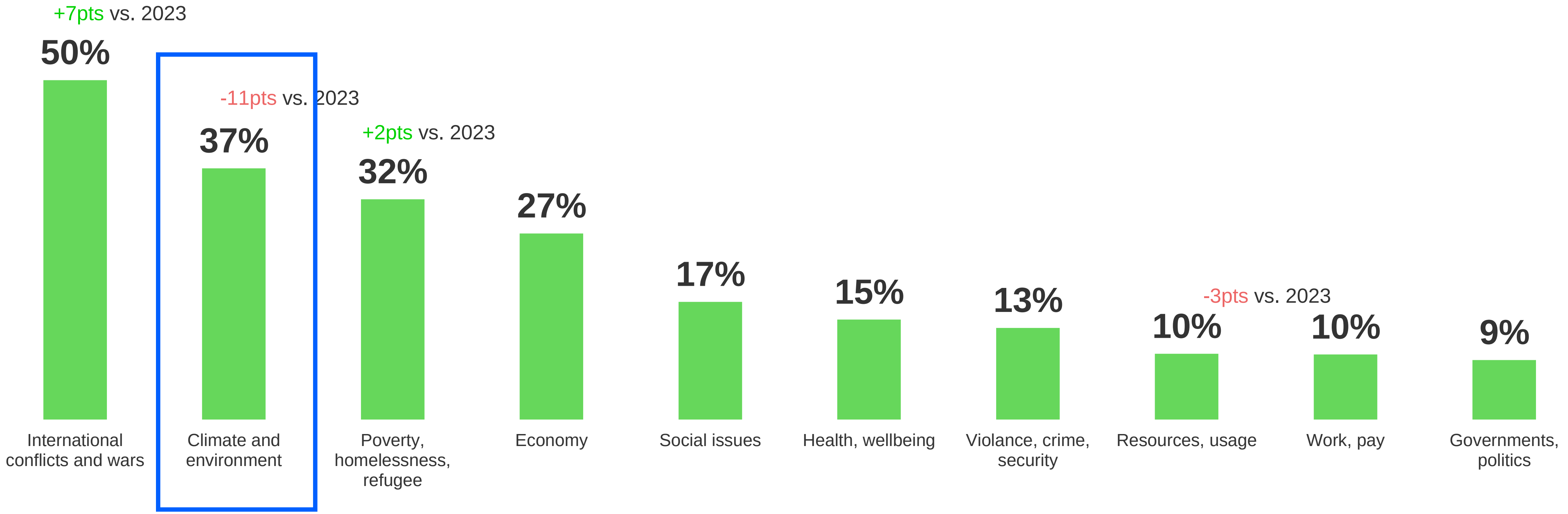
Relative severity of risks over a 2- and 10-year period



https://www.policyuncertainty.com/index.html
[WEF_The_Global_Risks_Report_2024.pdf (weforum.org)](WEF_The_Global_Risks_Report_2024.pdf)

Globally, Climate & environment remains the number one concern, while in Europe, International conflicts & wars moved to the top this year.

% of people mentioning big issues that need to be solved based on verbatim – 2023 vs. 2025 - EU



Kantar's Sustainability Sector Index 2023 & 2025
Q11. Can you name 3 big issues happening in the world that you think something needs to be done about? (OE)
Base: 2023 Europe = 11010 respondents; 2025 Europe = 9003 respondents

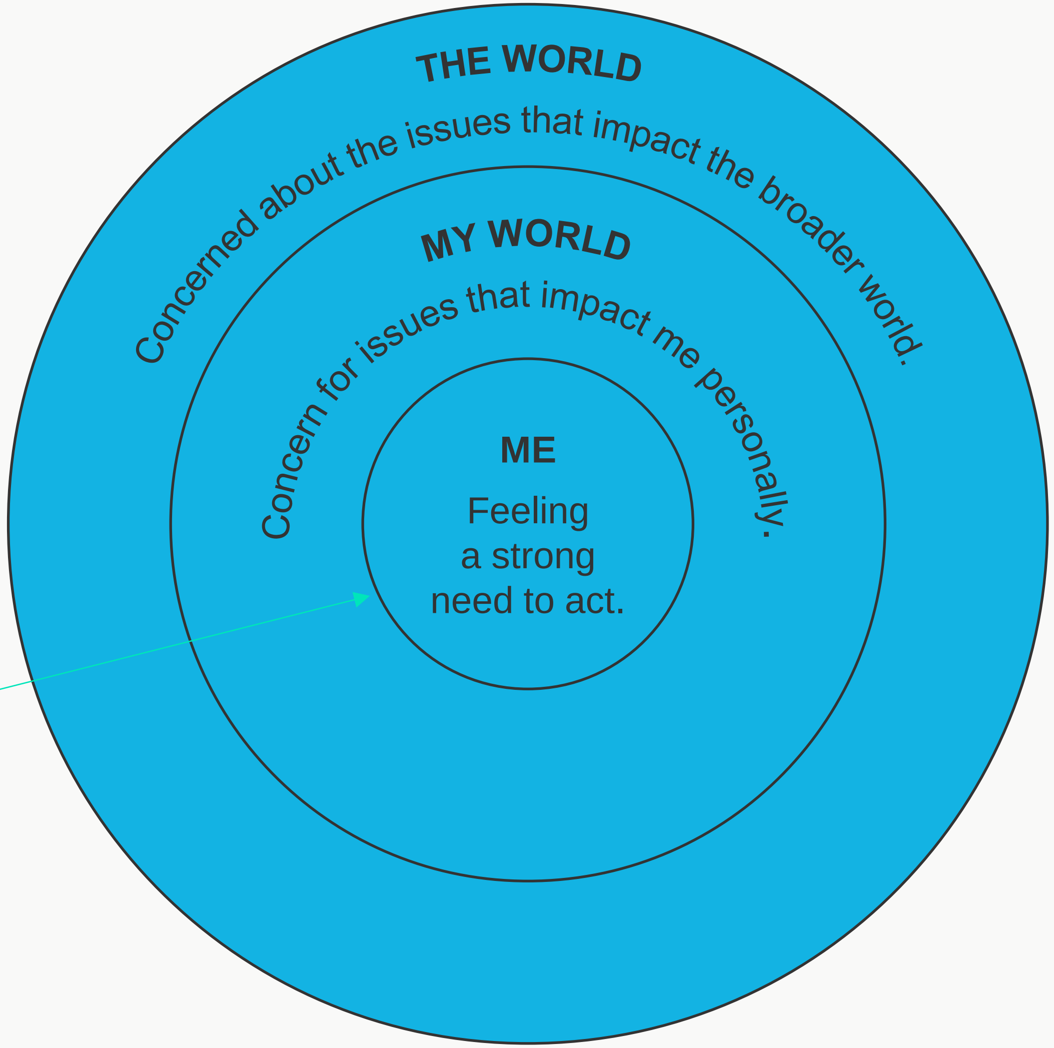
Climate is a human issue

Despite real and perceived impact, sustainability issues including climate, don't always feel personal for people

Longitudinal data demonstrates that people don't act on an issue unless it is personal to them and their lives.

The closer issues feel to people, the higher the motivation to act on the topic.

Me – My World – The World Model



Similarities and variations across the world

- **Climate and environmental issues** alongside **global conflicts** are among the foremost concerns worldwide
- Individuals in Asia and Latin America, who are currently **most at risk** from the effects of climate and environmental shifts, **highlight climate change**
- In **Europe**, concerns regarding **international conflicts and wars** are the primary focus
- When it comes to **social issues,** people in **Saudi Arabia, Taiwan, and Japan** generally pay **less attention**.

People already feel the impact of these issues and the cost of inaction is becoming tangible

65%
+1pt vs. 2023

expect to **personally feel the effects of climate change in their lifetime**

55%
-1pt vs. 2023

Say they "**already feel impacted by environmental issues**"

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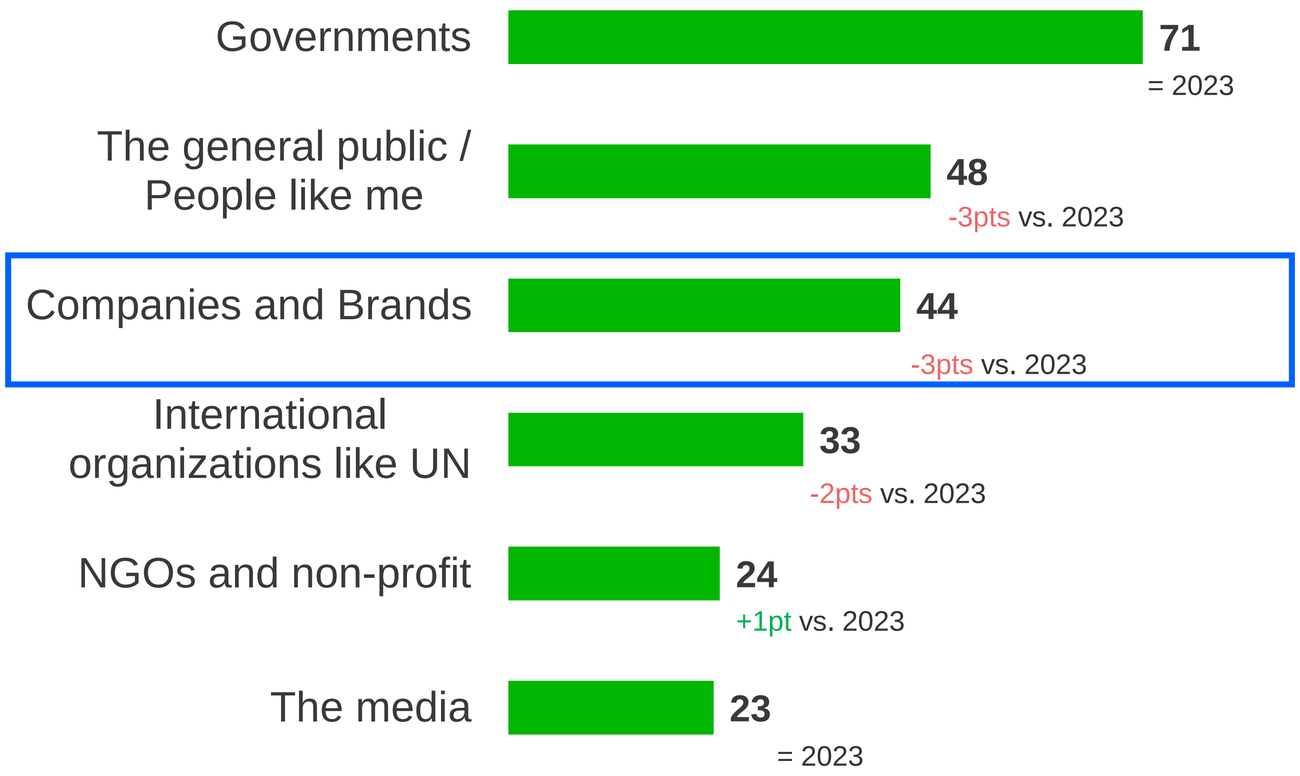
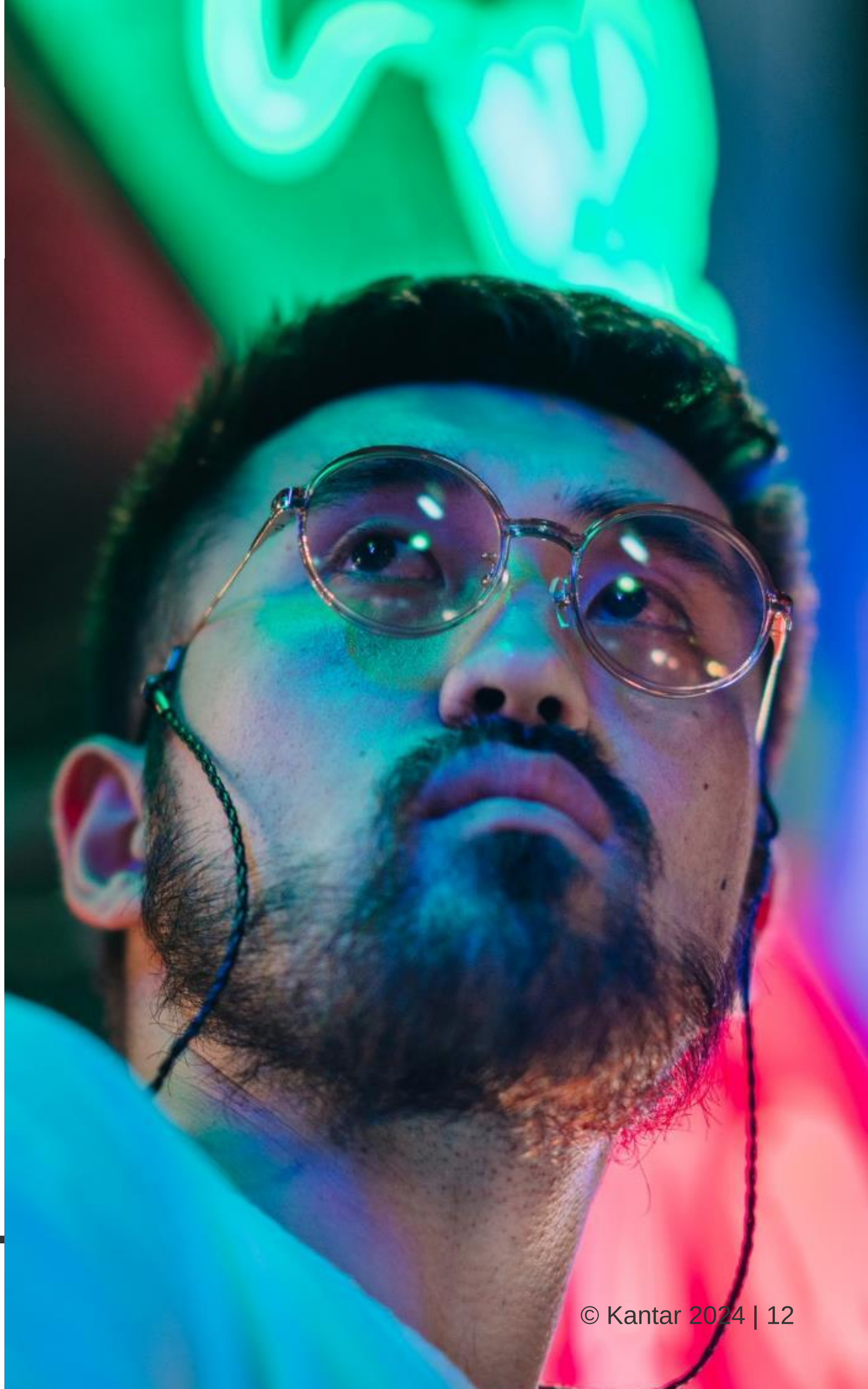
Kantar Sustainability Sector Index 2025
Q20. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Base:Europe = 9003 respondents

People expect companies/brands to step up on environmental issues, esp. in Western Europe

Responsibility for solving environmental issues:





Kantar's Sustainability Sector Index 2023 & 2025
Q15. Whose responsibility is it to help solve/tackle environmental issues in the country where you live?
Base: Europe = 11010 respondents; 2025 Europe = 9003 respondents

A generational gamechanger is taking place

Similar to the post-WW2 period, our era is marked by a fundamental generational pivot that will act as a market disruptor for many years to come

Early-Mid 20th century	Shift	Post-WW2	Shift	21st century
Institutionalism		**Individualism**		**Mutualism**
Lost Generation, G.I. Generation, Silents		Leading-Mid Boomers, Trailing Boomers, GenX, Early Millennials, Trailing Millennials		GenZ

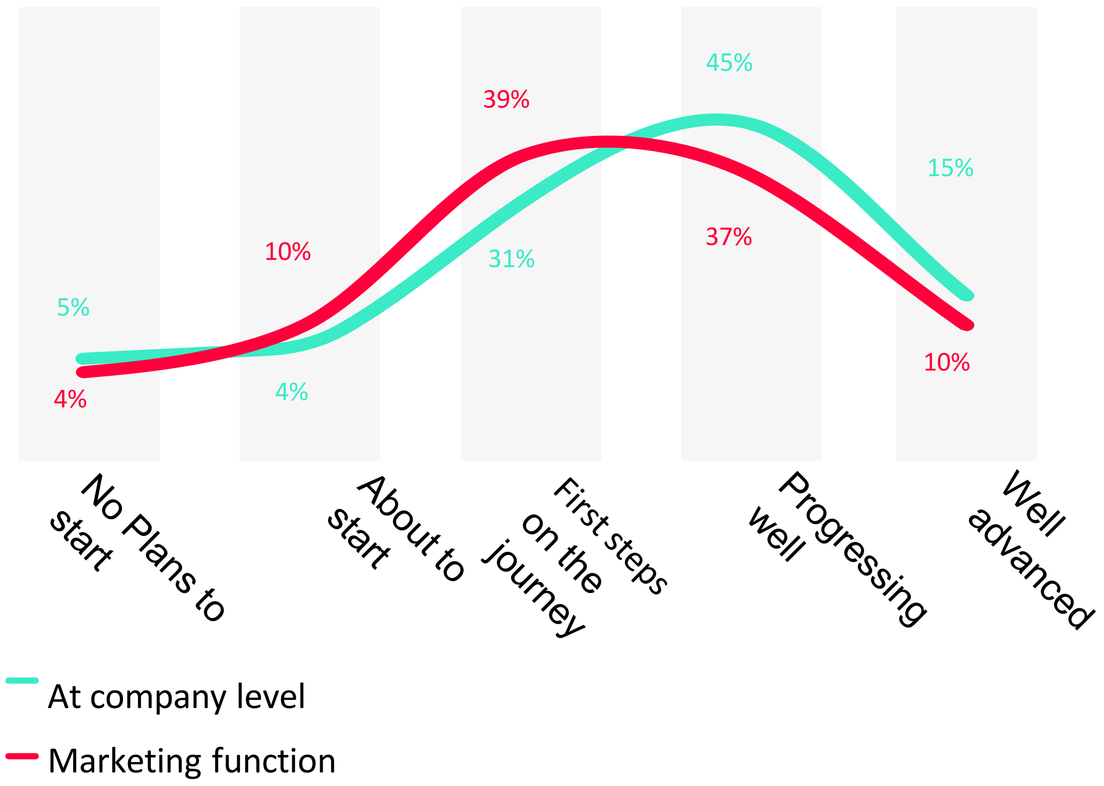
But marketers feel we're not moving fast enough…

90%

of marketers agree that sustainability agendas must be **more ambitious**

94%

of marketers say they need to **act more bravely and experiment** to drive transformative change



Source: Sustainable Marketing 2030 research, Kantar/WFA, 2022 (28 interviews with global leaders and sustainability experts + 938 interviews with marketers across 48 countries)

Because it is an economic imperative

$12T

The annual economic opportunity represented by the sustainable transition*.

New forms of thinking

88%*

of board directors felt that climate requires new forms of thinking and leadership from the Boardroom, the Executive and the workforce.

Opportunity and innovation

84%*

of board directors said that climate represents opportunity and innovation for business

*Source: McKinsey; WBCSD; Kantar Climate Governance Initiative Global Impact Study, 2024

Sustainability drives brand growth

Brands are leaving enormous value on the table by not prioritising sustainability

By measuring elements of E, S & G in BrandZ for over 10 years we have seen how sustainability perceptions can build **equity**, **predisposition** for a brand, driving **volume** and ability to command a **premium**.

Sustainability perceptions contribute…

Up to 10% to brand value

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Learnings

Sustainability remains a **key focus for consumers**, despite other major concerns.

The more people feel **closely impacted**, the **more concerned** they are likely to be.

Consumers want companies to step up and help them live more sustainable lifestyles.

Younger consumers, who will define the marketplace for years to come, **disproportionately value sustainability**.

Sustainability **drives economic opportunity,** and sustainability perceptions can build **equity**, drive **volume** and has the ability to command a **premium**.

2.
What are the sustainability topics they care about?

Consumer issues vary by sector, for example...

Strongest sector association to the overall top concerns on sustainability

Poverty
- Financial services, banking, insurance
- Luxury products
- Beer, wine, alcoholic beverages

Extreme weather events
- Oil and gas
- Energy providers
- Travel

Mental health issues
- Beer, wine, alcoholic beverages
- Over The Counter medicine
- In-home entertainment

Climate change
- Oil and gas
- Energy providers
- Travel

Water pollution
- Laundry, Washing Detergent, Fabric care
- Cleaning, home care products
- Oil and gas

Increasing economic inequality
- Financial services, banking, insurance
- Luxury products
- Property to buy or build

Air pollution
- Oil and gas
- Cars
- Travel

Lack of jobs with a sufficient living wage
- Super/hypermarkets
- Fast food, casual restaurants
- Financial services, banking, insurance

Physical health issues
- Beer, wine, alcoholic beverages
- Over The Counter medicine
- Confectionery

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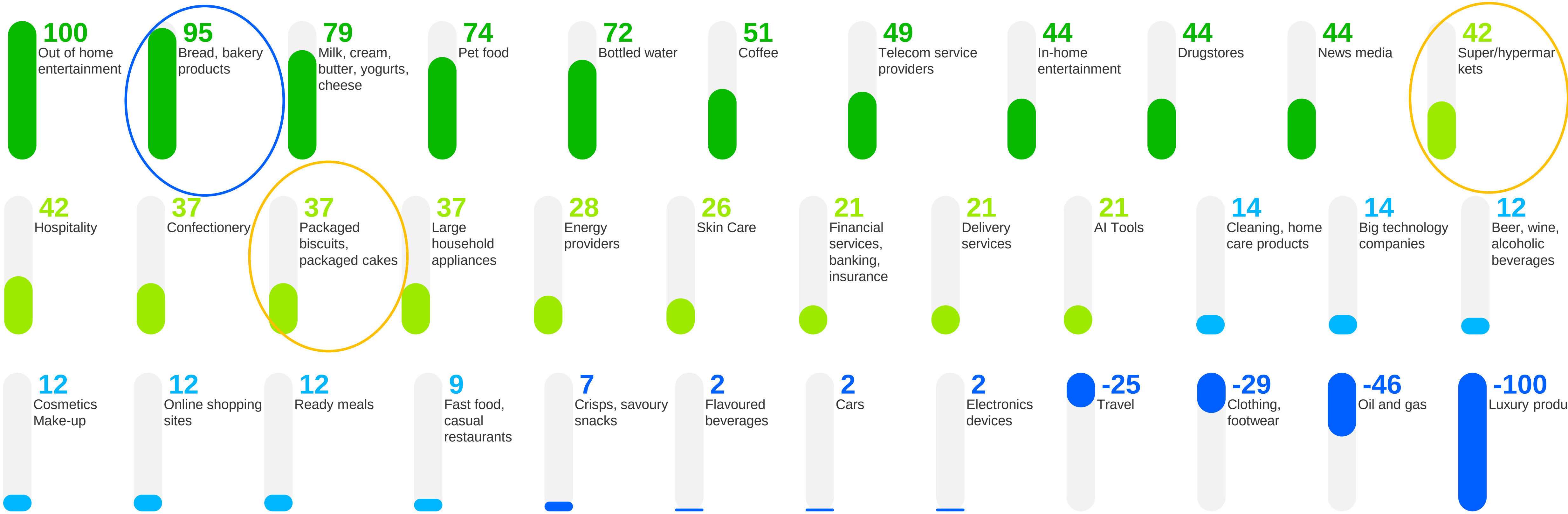
Kantar’s Sustainability Sector Index 2025
Q27. Please indicate which of the following social and environmental issues, if any, you associate most with [sector].
Base: Global = 22004 respondents

Specific Bread & Bakery perceptions indicate opportunity to lead on sustainability. Super-/hyper-markets and Packaged biscuits: more work to do to connect with consumers.



Kantar's Sustainability Sector Index 2025
Q33. Based on what you have seen, heard, or experienced, how would you rate brands in this sector on the following dimensions?
Index built using average scores across the 6 diagnostics, indexed vs. all sectors.
Base: Europe, n=9003 respondents.

Bread & Bakery consumers care about quality of food degradation, overproduction/-consumption, food shortage/waste and intensive farming

Most relevant issues

Quality of food degradation	**20%**
Overproduction and overconsumption	**19%**
Food shortages	**17%**
Waste	**16%**
Intensive farming practices	**16%**
Overpackaging, single-use, non-recyclable packaging	14%
Degradation of soil health due to agricultural practices	**12%**
Physical health issues	10%
Over-exploitation of our planet's natural resources	10%
Poverty	10%
Release of greenhouse gas emissions	**8%**

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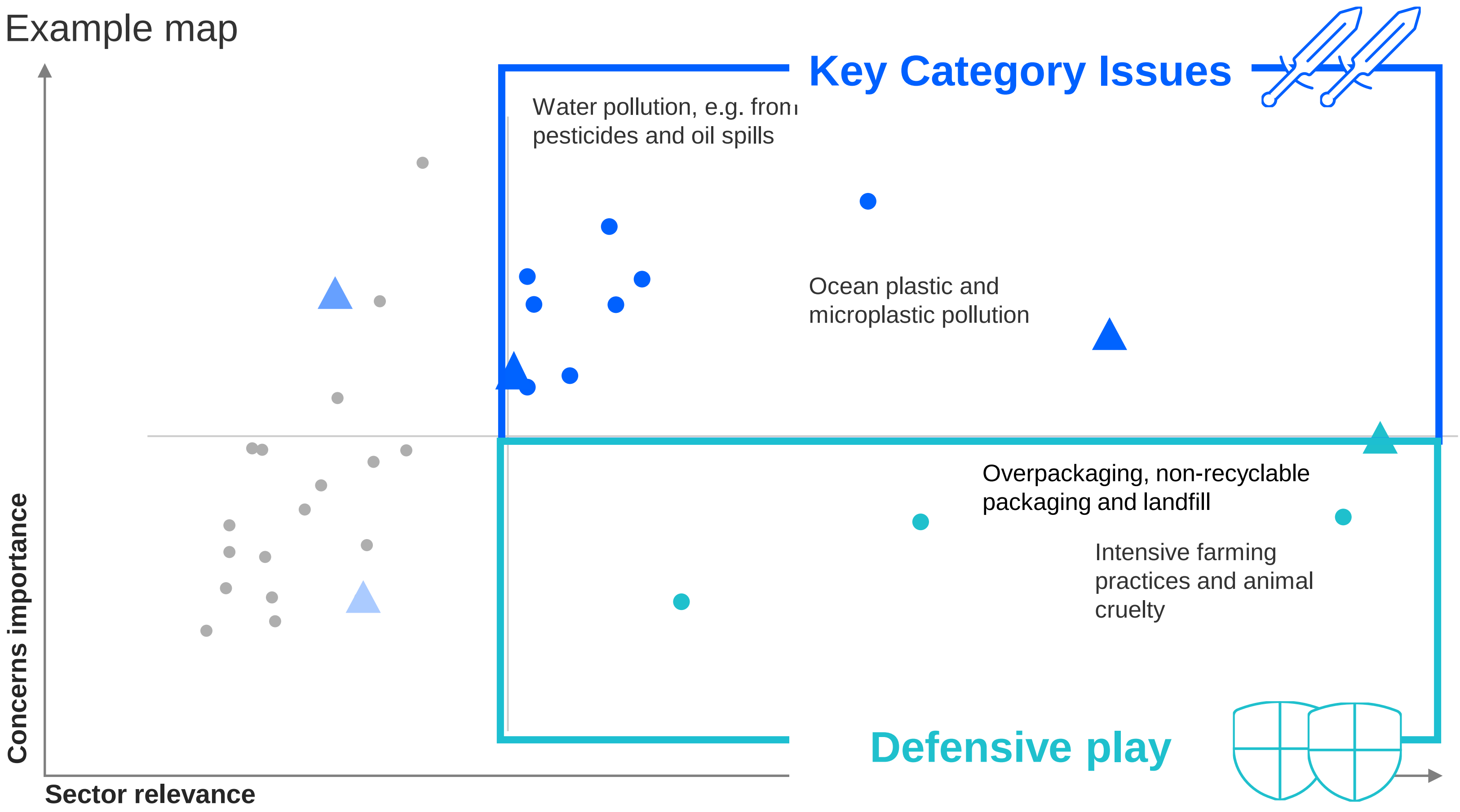
Kantar Sustainability Sector Index 2025
Q27. Please indicate which of the following social and environmental issues, if any, you associate most with Bread, bakery products.
Base: Europe Bread, bakery products n = 1285 respondents

How to prioritise consumer issues: overall concern x sector/category relevance



#2 PRIORITY

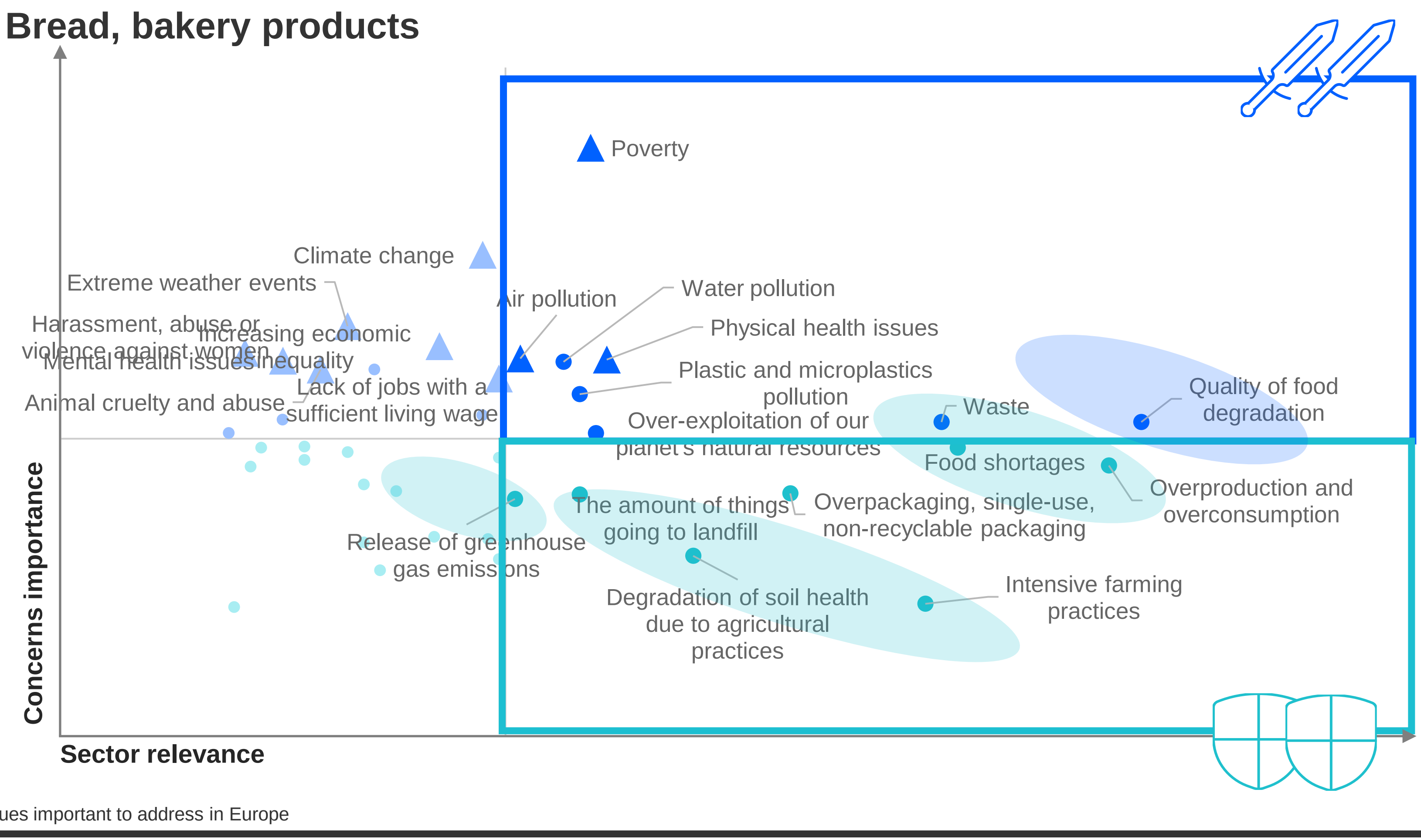
Once the shields are leveraged, these drivers can then **further differentiate** moving forward (potentially setting trends).

#1 PRIORITY

Without these, the brand does not meet **fundamental consumer expectations**.

▲ Top 10 issues important to address in Europe

Fundamentals: overproduction/consumption and intensive farming;
Leadership issues: food quality, waste



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Kantar Sustainability Sector Index 2025
Q12. Which of the following environmental or social issues are you most concerned about?
Q14. Which issues do you see as particularly important to address in the country where you live?
Q27. Please indicate which of the following social and environmental issues, if any, you associate most with Bread, bakery products.
Base: Europe Bread, bakery products n = 1285 respondents

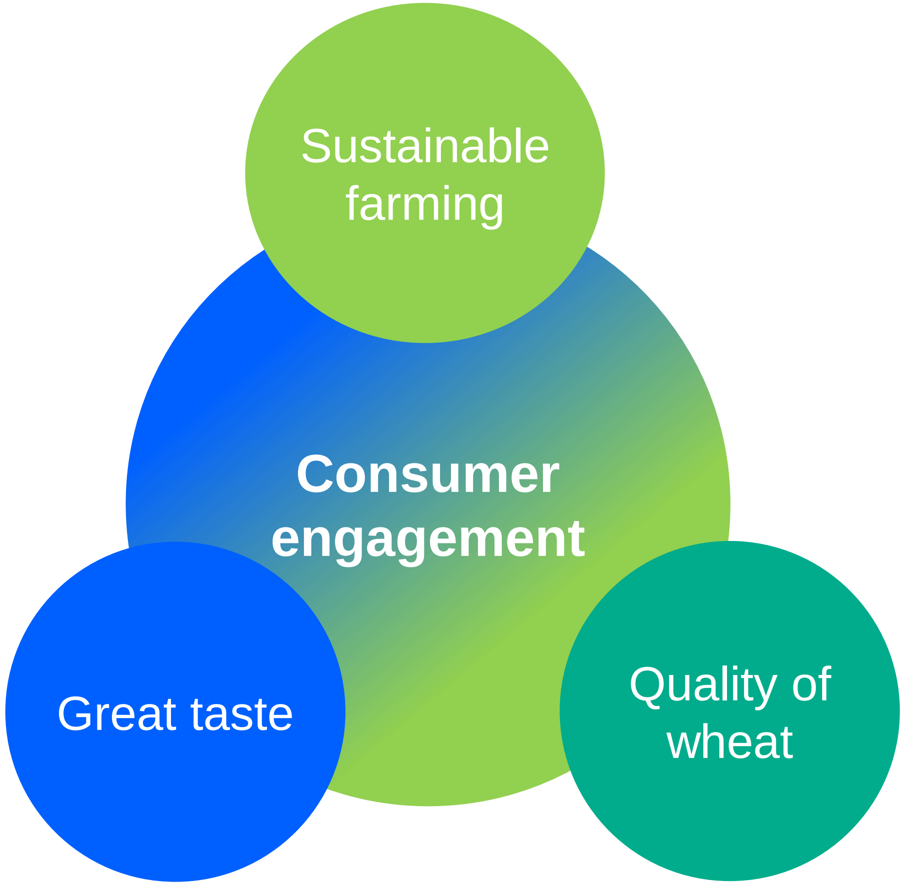
Super-/hypermarkets and packaged biscuits share issues with Bread & bakery on quality of food degradation, overproduction/-consumption and waste

Most relevant issues – in %

Quality of food degradation	**20%**	**24%**	**20%**
Overproduction and overconsumption	**19%**	**28%**	**26%**
Food shortages	**17%**	14%	12%
Waste	**16%**	**28%**	**25%**
Intensive farming practices	**16%**	11%	8%
Overpackaging, single-use, non-recyclable packaging	14%	**33%**	**28%**
Degradation of soil health due to agricultural practices	**12%**	8%	5%
Physical health issues	10%	9%	**19%**
Over-exploitation of our planet's natural resources	10%	13%	8%
Poverty	10%	14%	8%
Release of greenhouse gas emissions	**8%**	**10%**	**8%**

Kantar Sustainability Sector Index 2025
Q27. Please indicate which of the following social and environmental issues, if any, you associate most with Bread, bakery products.
Base: Europe Bread, bakery products n = 1285 respondents

Addressing perceived issues on quality of food degradation should help drive perceptions of taste and quality – the key category drivers overall



Perceptions of overproduction, waste and intensive farming also key to address

Learnings

Perceived sustainability **issues vary by sector/category**.

Bread & bakery is very well perceived and has the **opportunity to be a sustainability leader**.

Key sector issues to address are **quality of food degradation, overproduction, waste and intensive farming**.

Addressing perceived issues on **quality of food degradation** should help drive perceptions of **taste** and **quality** – the key category drivers overall.

Supermarkets and packaged biscuits share similar issues on quality of food degradation, overproduction and waste.

3.
Are consumers ready to pay for sustainable products ?

Consumers are increasingly willing to purchase more sustainably

40% are prepared to invest time and money to support companies that try to do good
+2pts vs. 2023

44% stopped buying certain things because of their impact
+3pts vs. 2023

47% believe buying sustainable shows others who they are and what they believe in
+3pts vs. 2023

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Kantar Sustainability Sector Index 2023 & 2025
Q20. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Base: 2023 Europe = 11010 respondents; 2025 Europe = 9003 respondents

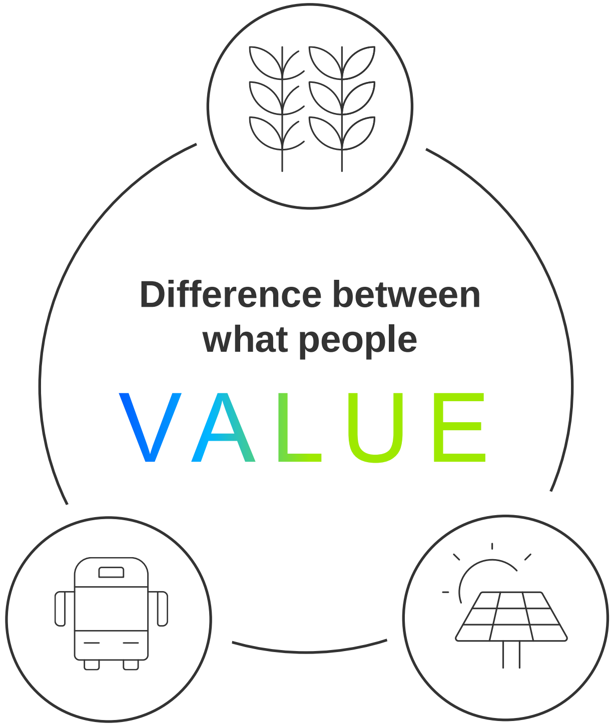
For many GenZers and Millennials, sustainability **is a core part of who they are**

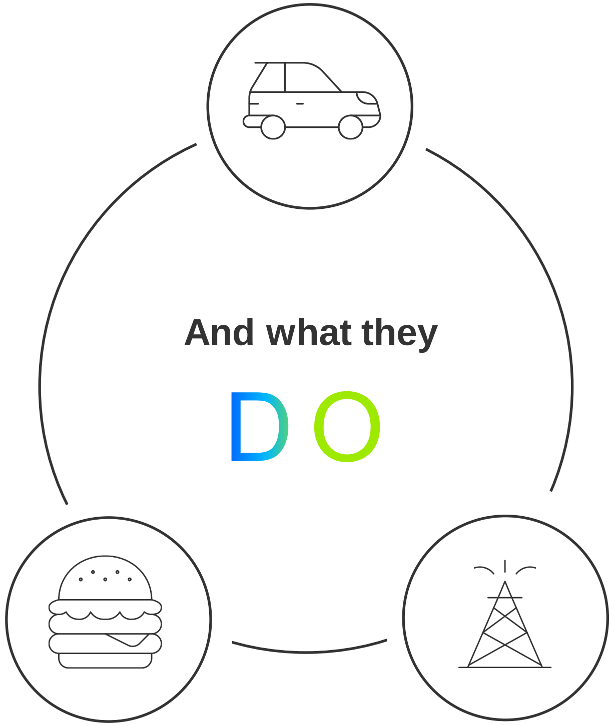
Younger consumers – the future of the marketplace - are the most sustainably-oriented

	Prepared to invest time & money to support companies that try to do good	Stopped buying certain things because of their impact	Buying sustainable shows others who I am and what I believe in
Total population	40%	44%	47%
Gen Z	47%	46%	51%
Millenials	44%	47%	49%
Gen X	36%	42%	45%
Boomers	30%	38%	42%

Kantar Sustainability Sector Index 2025
Q20. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Base: 2025 Europe = 9003 respondents

Despite best intentions, there is still a value-action gap to unlock





76% of people want to make more sustainable choices across sectors

22% of people are actively changing their behaviour

Source: Kantar Sustainability Sector Index 2025
Q27. Please indicate which of the following social and environmental issues, if any, you associate most with [category].
Q28. Thinking about these issues you associate to [category], how often do you think they influence your purchase decision-making? (Most of the time and All the time)
Base: n = 9003 of category users/buyers per category

People experience real behavioral barriers: they are looking for help

General key issues:

72%
-1pt vs. 2023

Think **things better for the environment and/or society are more expensive**

→ VALUE

56%
-1pt vs. 2023

Feel that **it is really hard to tell what is good or bad ethically, or for the environment**

→ INFORMATION

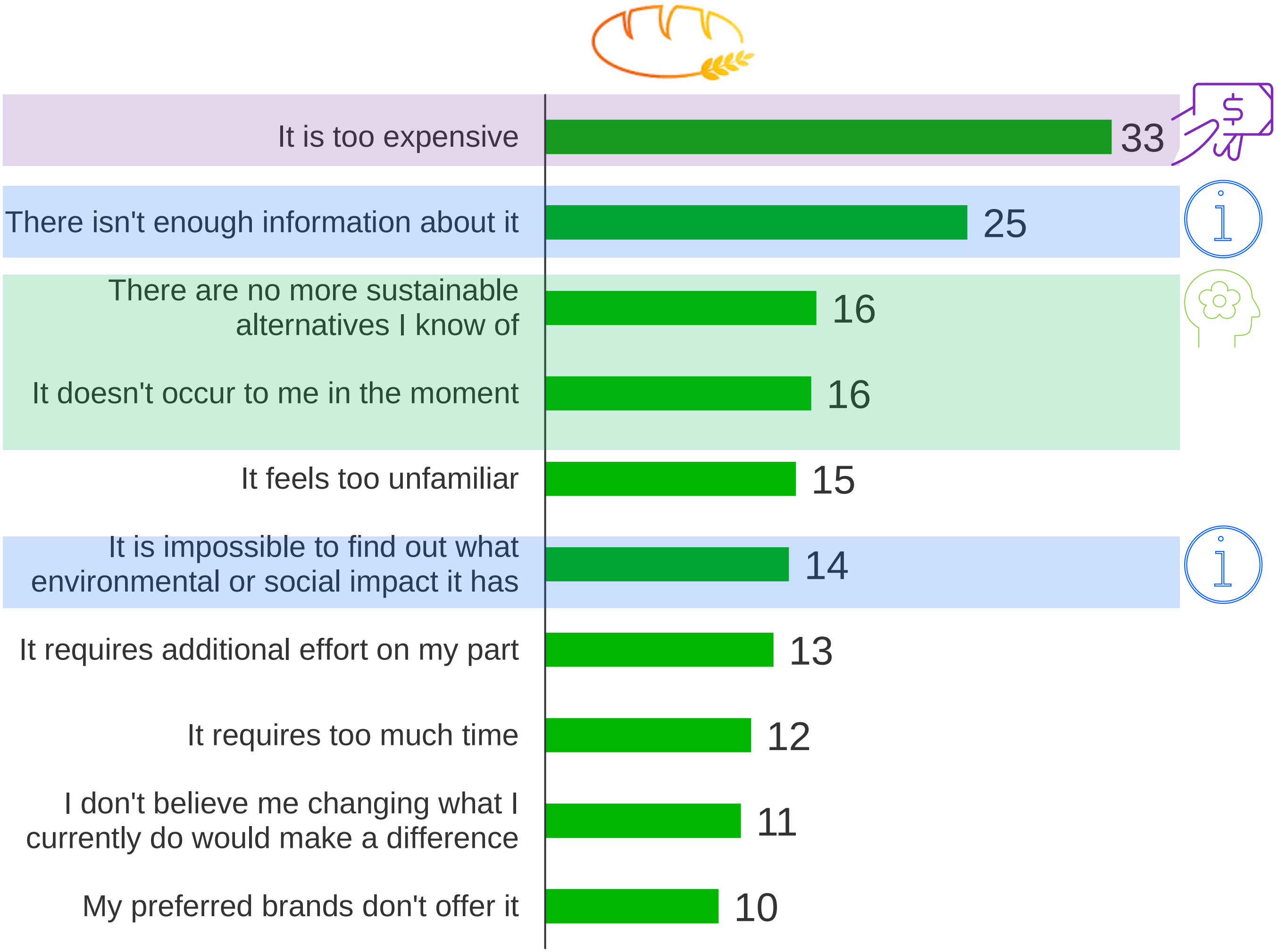
34%
+2pts vs. 2023

Don't know where to find sustainable / ethical products or services

→ ACCESSIBILITY

Kantar Sustainability Sector Index 2025
Q20. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Base:Europe = 9003 respondents

In Bread & Bakery, information, offer accessibility and value are key barriers to unlock



Kantar Sustainability Sector Index 2025
Q32. And what are the reasons that make it difficult to be more sustainable when choosing Bread, bakery products, Food & Beverages?
Base: Europe, category users/buyers per category n= 885

Consider how different consumers require different unlocks

ACTIVES

33% +3pts vs 2023

Actives are **much more likely to believe they can make a real difference** through their actions.

BELIEVERS

20% -2pts vs 2023

Believers are **heavily influenced by social factors**, listing celebrities as a strong influence over purchasing decisions.

CONSIDERERS

32% -1pt vs 2023

Considerers **are less likely to take personal responsibility** for sustainability issues and **don't feel they can make a difference** through their choices.

DISMISSERS

16% +1pt vs 2023

Dismissers are characterised by their apathy to all things sustainable.

Different segment attitudes suggest different approaches and emphases

ACTIVES

33% +3pts vs 2023

Actives are much more likely to believe they can make a real difference through their actions.

Key perceived issues for Bread & Bakery: Quality of food degradation, Waste, Overconsumption, Intensive farming

Key barriers to unlock: Offer accessibility

BELIEVERS

20% -2pts vs 2023

Believers are heavily influenced by social factors, listing celebrities as a strong influence over purchasing decisions.

Key perceived issues for Bread & Bakery: Quality of food degradation, Overconsumption, Intensive farming

Key barriers to unlock: Information, Offer accessibility

CONSIDERERS

32% -1pt vs 2023

Considerers are less likely to take personal responsibility for sustainability issues and don't feel they can make a difference through their choices.

Key perceived issues for Bread & Bakery: Quality of food degradation, Overconsumption, Intensive farming

Key barriers to unlock: Concern that need to compromise on quality

DISMISSERS

16% +1pt vs 2023

Dismissers are characterised by their apathy to all things sustainable.

Key perceived issues for Bread & Bakery: Intensive farming

Key barriers to unlock: Value

Learnings

Consumers want to purchase more sustainably. However, a significant **value-action gap** remains.

Significant behavioural barriers can be identified to reduce the value-action gap. In Bread & Bakery, **information, offer accessibility** and **value** are key.

Different consumer segments require different approaches and emphases:

- **Actives:** **Quality of food degradation**, **Waste, Overconsumption** and **Offer accessibility** key
- **Believers:** **Quality of food degradation**, **Overconsumption**; **Information** and **Offer accessibility** key
- **Considerers:** **Quality of food degradation**, **Overconsumption; Compromising on Quality** key perceived barrier
- **Dismissers:** **Value**
- **Intensive farming** is an issue for **ALL** segments

4. How can the sector and retailers demonstrate leadership?

Sustainability leadership

To build a leadership position, consumers must trust in the sector's authenticity

69% worry brands are involved just for commercial reasons.

INSPIRING TRUST

INTEGRITY … doing what you say, communicating actions honestly.

IDENTIFICATION … focusing on what the brand can authentically champion in the eyes of consumers.

INCLUSION … creating a sustainable movement that is accessible to as broad a consumer audience as possible.

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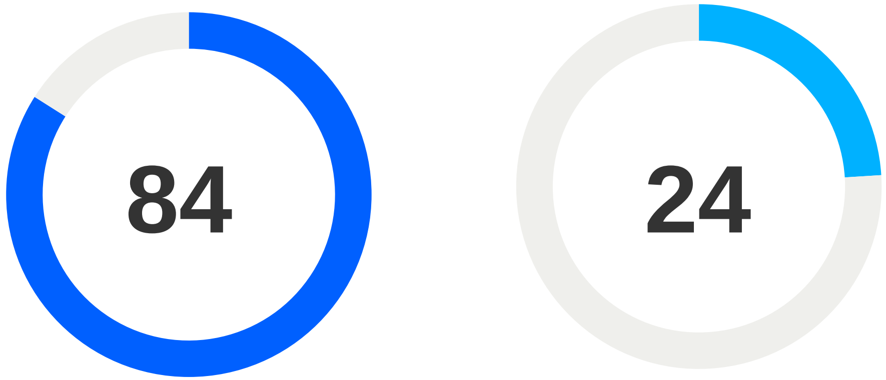
Kantar Sustainability Sector Index 2025
Q20. To what extent do you agree with the following statements? (Top 2 Box Strongly agree/agree)
Base: Europe = 9003 respondents

In terms of advertising: simply talking about sustainability does not equal success.
Your message should be true to your brand.

Credibility is the make-or break factor

Demand Power Contribution



Sustainability message AND fits with brand

Sustainability message BUT weak fit brand

Impact

With a sustainability message AND high Credibility

With a sustainability message BUT weak Credibility

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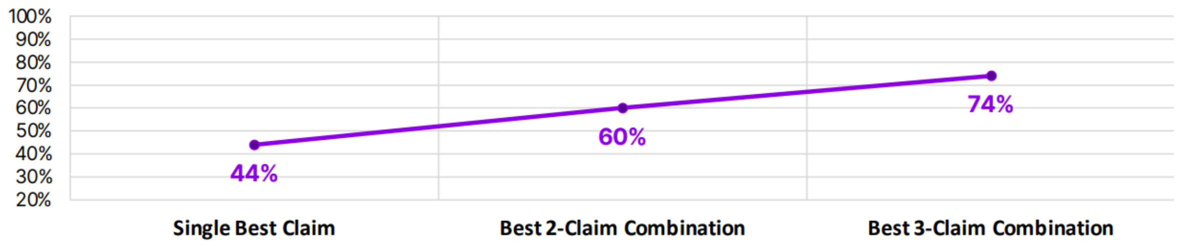
Source: Kantar LINK Database
Average Demand Power Contribution percentile; Average percentiles reported

In terms of claims: sustainability claims that link to category drivers enhance consumer appeal and broaden penetration

1. Sustainability claims significantly expand brand reach by bringing in new consumers



Core Category Claim e.g., great tasting	**Core Category Claim** e.g., great tasting	**Core Category Claim** e.g., great tasting
	Sustainable Claim e.g., not tested on animal	**Sustainable Claim** e.g., not tested on animals
		Sustainable Claim e.g., no phthalates, phosphates etc.

2. Sustainability claims that link to category drivers (e.g., taste/quality for Bakery) maximise appeal

Wildfarmed

Tagline :

“Transforming Lunches and Landscapes.”

Sustainable characteristics:

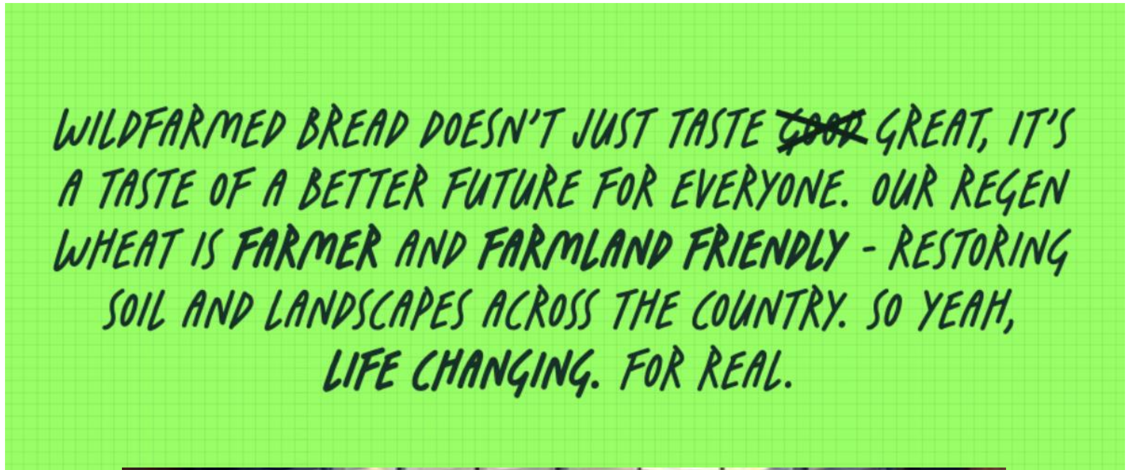
Regenerative farming

Association with category drivers:

“**Better for taste, nutritional and environmental impact**.”

Success:

In 2022, M&S introduced Wildfarmed Regenerative Flour into top-performing bakery range, M&S Collection Sourdough. Sales: 75,000 loaves/ week, +86% year on year



Maple Hill associates regenerative farming to “taste” and “quality”

Tagline:

“100% Grass-Fed Organic. The Way Nature Intended.”

Sustainable characteristics:

Reinvented regenerative dairy farming. Organic grass + cows roaming free on open pastures + small family farmers network ensured fair pricing.

Association with category drivers:

100% grass-fed dairy farming is a virtuous cycle that pulls carbon out of the air and puts it to use in the ecosystem. They says their milk is “**not only delicious, but it’s nourishing for all ages**.”.

Success:

Consistent expansion in product lines and market presence (from 65 to 135 farms)

Conclusions

- Sustainability **drives economic opportunity,** and sustainability perceptions can build **equity**, drive **volume** and has the ability to command a **premium.** It remains **key for consumers – especially younger**

- Bread & Bakery has the **opportunity to be a sustainability leader by addressing key category issues and behavioural barriers - and to partner with supermarkets**, which share similar issues:
  - Category issues - **quality of food degradation, overproduction, waste and intensive farming**
  - Behavioural barriers - **information, offer accessibility, value**

- However, sustainability by itself will not secure a leadership position. Sustainability claims and messaging must be **linked to core category drivers of taste and quality**. Addressing perceived issues on **quality of food degradation** should help drive perceptions of **taste** and **quality**

- **The more scientific/technical issues, eg, CO2 reduction, are more difficult for consumers to relate to the category and therefore do not resonate as isolated claims**

- Target different consumer segments with different benefit-led approaches and emphases that build off category issues and behavioural barriers:
  - **Actives:** Quality of food degradation, Waste and Overconsumption, Intensive farming; Offer accessibility key
  - **Believers:** Quality of food degradation, Overconsumption, Intensive farming; Information and Offer accessibility key
  - **Considerers:** Quality of food degradation, Overconsumption, Intensive farming; Compromising on Quality key perceived barrier
  - **Dismissers:** Value, Intensive farming

- **Sustainability claims and messaging will broaden reach and appeal and deepen the consumer connection when linked to and enhancing category drivers of Taste and Quality - and should be leveraged as a core reason to believe**

THANK YOU !