

WHO CARES, WHO DOES?

CONSUMER RESPONSE TO PLASTIC WASTE

SEPTEMBER 2019



KANTAR

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GfK



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Natalie Babbage
Global LinkQ Director
Worldpanel Division

FINDING OPPORTUNITY IN ENVIRONMENTAL CONCERN

Whether it's the influence of the media, or public demonstrations against climate change, the impact of plastic on the environment has captured the attention of consumers worldwide.

The Fast Moving Consumer Goods (FMCG) industry is facing its own battle with plastic, and public outcry has led to a response from some of the most prominent brands around the world. Supermarket chains have done away with single-use plastic bags, while many manufacturers have taken steps to reduce or remove plastic packaging at point of sale or in their supply chain.

Throughout the following pages, we want to help retailers and manufacturers answer the following important questions:

- How much do shoppers really care?
- Are their criticisms and wishes reflected in their own purchase behaviour?
- Which regions, countries and demographics are most engaged with reducing their plastic consumption?
- Where does the opportunity lie for retailers and manufacturers?

In collaboration with Europanel and GfK, we've surveyed more than 65,000 people in 24 countries— exploring how they feel about the use of plastics by FMCG companies.

What makes this study unique is our ability to compare their answers with our panellists' real purchase behaviour, to truly understand how they change their shopping baskets and their relationship with the brands they are choosing.

Our research found that nearly half (48%) of all consumers worldwide expect manufacturers to take the lead, saying they have the most responsibility to act on these issues. And making changes to account for this is clearly a matter of 'when', rather than 'if', for all businesses.

That said, retailers and manufacturers can't expect consumers to jump to their brand purely for their green credentials—and being 'green' or sustainable means different things in different markets.

By understanding the 'green gap' between those who say they care, and those that actually do something about it, we can unlock the opportunities of environmental concern—and help brands play an important role in shaping our future planet.



GLOBAL VS LOCAL

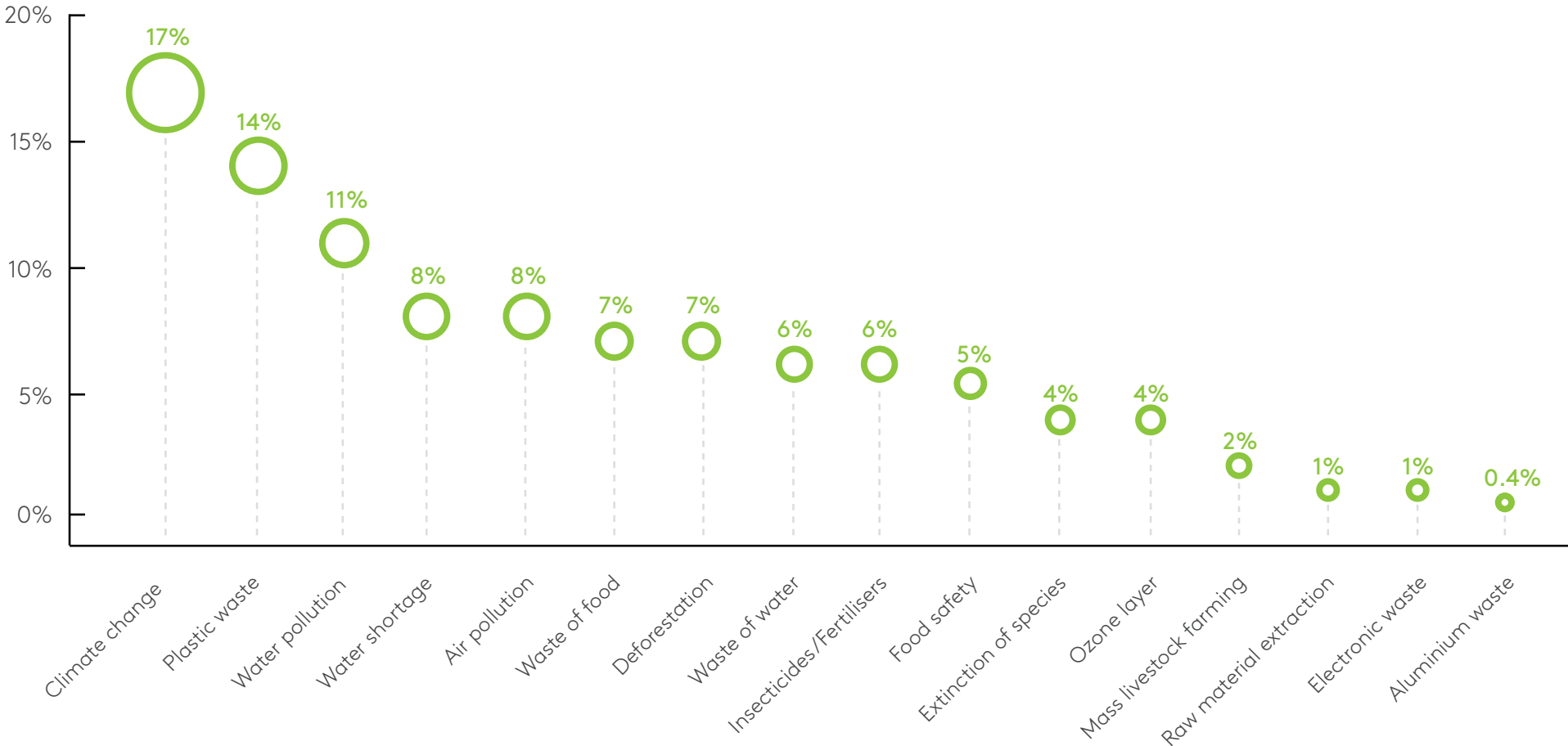
Act global; think local

Globally, climate change is consumers’ biggest concern—with 17% of all those surveyed listing it as their most pressing worry. Succeeding this is plastic waste (14%) – the focus of this publication – followed by water pollution (11%), water shortage (8%) and air pollution (8%).

There are, however, important regional nuances to consider—and manufacturers and retailers need to tailor their strategies to address different concerns. Those we spoke to in Western Europe were the most worried about climate change (24%). This figure was almost five times as high as it was in Asia (5%), where it was far less of a concern than food safety (15%) and water pollution (11%).

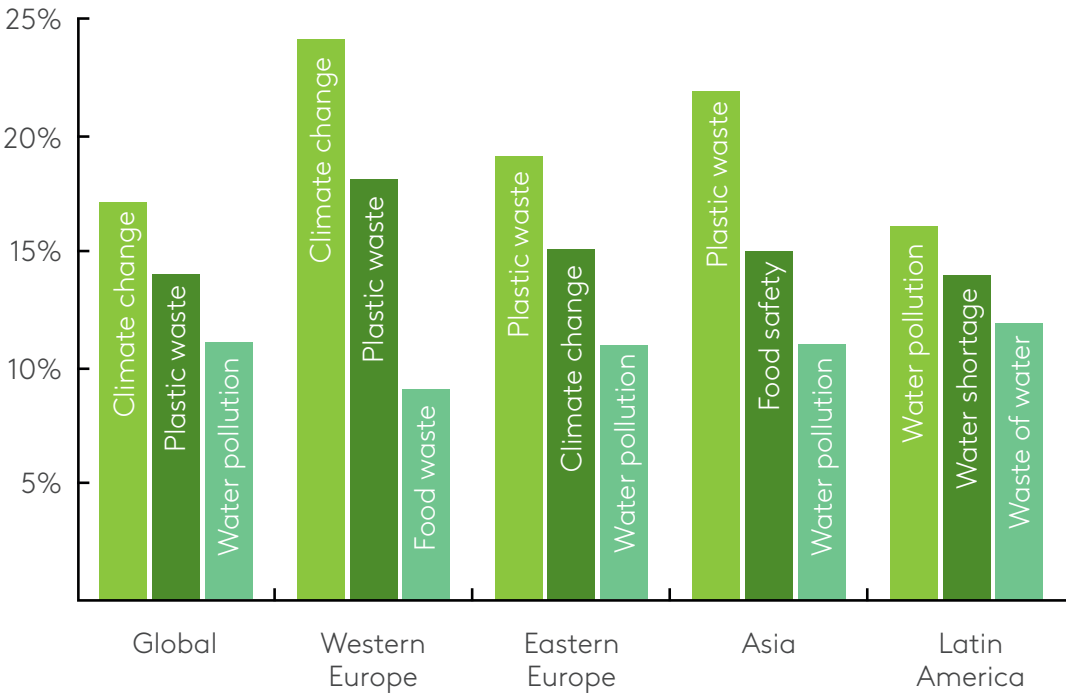
In Latin America, while 12% of respondents ranked climate change as their top concern, just 4% said the same for plastic waste. Conversely, despite being the region least worried about climate change, those surveyed in Asia listed plastic waste as their number one concern (22%).

Top Concern Globally



Source: Kantar, GfK

Top 3 concerns Global vs Local



Source: Kantar, GfK

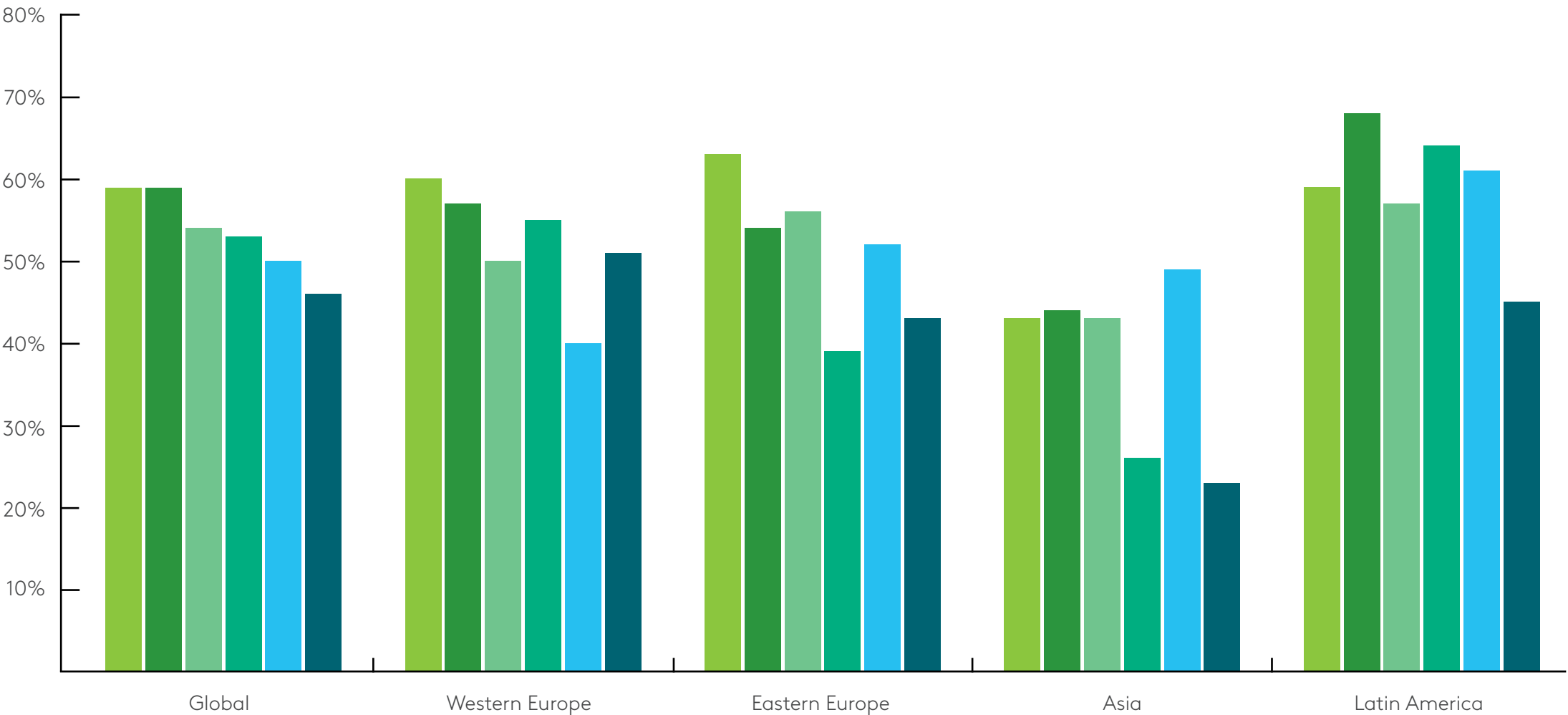
Concerns are localised, with consumers responding to topics given prominent media coverage, government initiatives, or problems that are quite literally in front of their eyes. Deforestation (8%) is a good example of this in Latin America, as is food waste in Western Europe (9%).

When looking at plastic waste in more detail, and the impact consumers associate with it, there are further regional differences. Globally, the areas of most concern are the damage it causes to the landscape, and water pollution (both 59%).

In Asia, however, air pollution (48%) stands out as the biggest associated concern, while water pollution (68%) and animal suffering (64%) are much higher in Latin America. Furthermore, reservations around micro plastics (51%) are higher than average in Western Europe.

Concern about impact of plastic waste?

Landscape Water pollution Health risks Animal suffering Air pollution Micro plastics



Source: Kantar, GfK

‘When’, not ‘if’

With plastic waste coming into sharp focus, several governments around the world have launched initiatives to reduce its impact—introducing severe penalties for manufacturers that do not abide by new regulations.

The reality is that manufacturers need to be agile enough to respond to new directives as they are brought in—and, if they don’t comply, they will soon be unable to sell in many countries. It is now a case of ‘when’ they make changes to their supply chain, not ‘if’.



GOVERNMENTS TAKE THE LEAD



The European Union

EU countries have agreed to conform to the Plastics Strategy set out by the European Commission, dictating that all plastic waste will be recyclable by 2030.

Part of this is the Single-Use Plastics Directive, which bans single-use products made of plastic for which alternatives exist – cotton bud sticks, cutlery and straws, for example – and includes measures to reduce the use of plastic food and beverage containers.

It follows the 2015 Plastic Bags Directive, which introduced charges for the use of plastic bags, and was successful in changing shopper behaviour across the continent.



Chinese Mainland

According to the official Xinhua news agency, Shanghai alone produces nine million tonnes of garbage every year—China's worst offender. It's estimated that just 10% of that is recycled.

In July 2019 the local government brought in the country's most ambitious recycling programme to date, in a bid to tackle the problem.

Household waste in the city now has to be sorted into four categories: "wet" garbage; "dry" garbage; recyclable waste; and hazardous waste. People found to be violating the rules face fines of up to ¥200 (nearly \$30) per offence, while businesses can be fined up to ¥50,000 (more than \$7,000).

Other regions

- In 2018, **Costa Rica** became the first country in the world to legislate a ban on all single-use plastics. It plans to phase them out completely by 2021.
- In many Asian countries, including **China, Indonesia** and **Malaysia**, governments refuse to accept foreign plastic waste.
- **France** has introduced a new law, coming into effect in 2020, requiring all plastic cups, plates and cutlery to be biodegradable. This is part of the country's Energy Transition for Green Growth.

WHO DOES?

The actions people take

Consumers across the world are concerned about a range of environmental issues, but are they taking steps to help resolve these?

Some initiatives have achieved global cut-through. For instance, most shoppers globally will now routinely take their own bags shopping with them. They will also use refillable containers for drinks, avoiding plastic bottles wherever possible.

Yet, as an action becomes less convenient, the number of consumers frequently performing it drops dramatically.

Sometimes this is down to the specificities of markets.

Globally, 50% of consumers will drink tap water when out of home. However, in Asia and Latin America where safe tap water is generally harder to come by, this drops to 30% and 29% respectively.

This could be a result of the wide availability of certain products.

In Latin America, for example, 52% of shoppers will wash with bar soap instead of liquid shower gel, which often comes in plastic packaging.

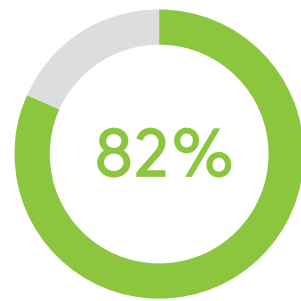
In Western Europe, however, only 25% of people use bar soap—with liquid shower gel being such a familiar, everyday item.

However, there are actions that prove so inconvenient that, no matter the market, shoppers are less likely to carry out. For example, only 22% of global shoppers will make sure the products they buy are not packed in plastic.

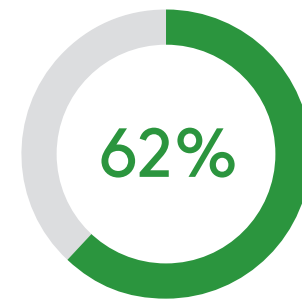
And those who say they are not looking for 100% recycled or alternative material were more likely to blame simply being unable to find these products, rather than thinking they're of poor quality or too expensive.



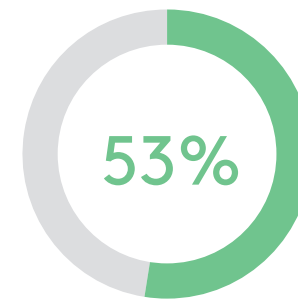
What actions do I take? Always or Frequently %



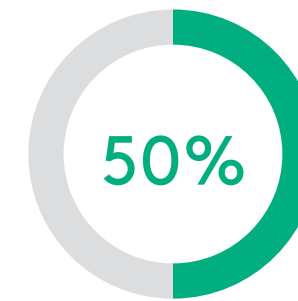
In my household we use washable, reusable rags, towels, cleaning utensils, etc. for cleaning



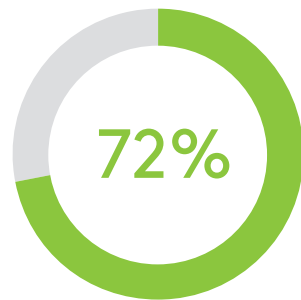
When I go out and take drinks with me, I use refillable drinking bottles



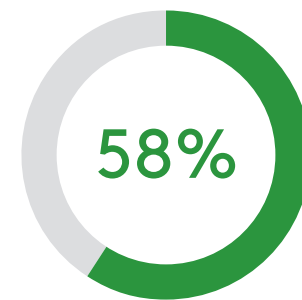
For products for which there are packaging-saving refill packs, I choose the refill pack



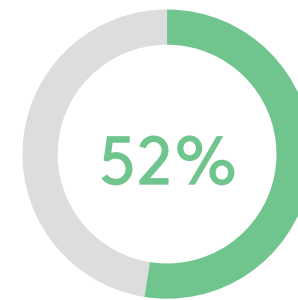
When out of home I drink tap water instead of bottled water



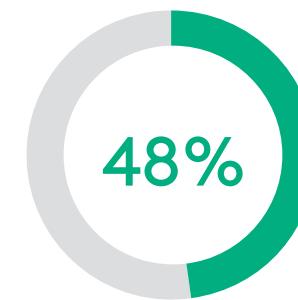
When I buy groceries or drugstore items, I have a bag / basket with me to carry my purchases



I avoid buying plastic cutlery or plastic plates when we plan barbecues, birthday parties or other parties at home



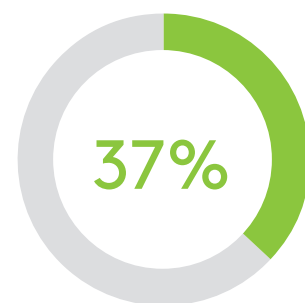
I often bring my lunch with me rather than buy takeout



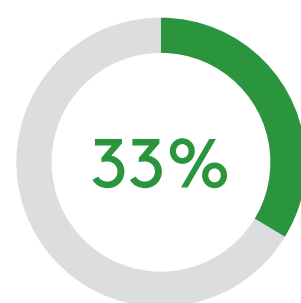
If I have to buy a bag at the checkout, I normally choose a fabric or paper bag instead of a plastic bag

Source: Kantar, GfK

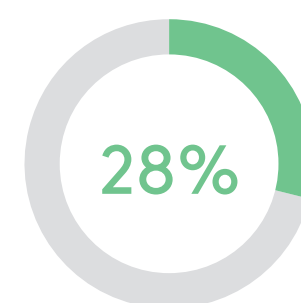
What actions do I take? Always or Frequently %



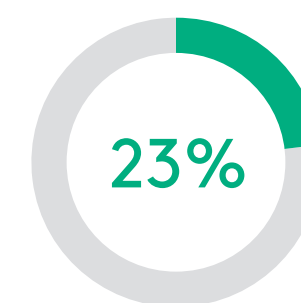
I wash with bar soap instead of shower gel or liquid soap to reduce plastic waste



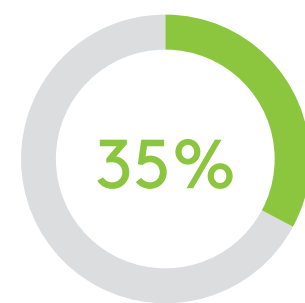
When buying fruit and vegetables I would choose/try to choose stores that offer fabric nets or paper bags instead of plastic bags



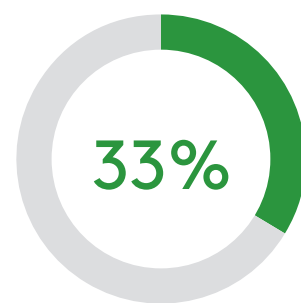
I avoid buying drinks in plastic bottles



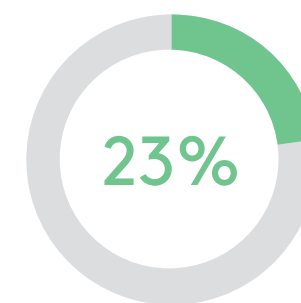
Use reusable products for baby care, beauty applications or feminine care



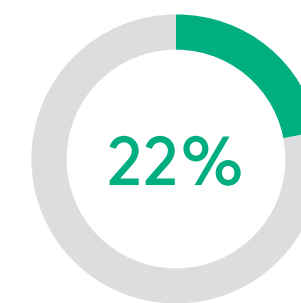
When I drink hot drinks on the go, I use a reusable (to go) cup



I avoid buying plastic products in other areas of my life (e.g. kitchen accessories, toys, home decoration)



I buy cotton swabs for cosmetic use that consist of paper or wooden swabs and not plastic swabs



When buying products, I make sure that they are not packed in plastic

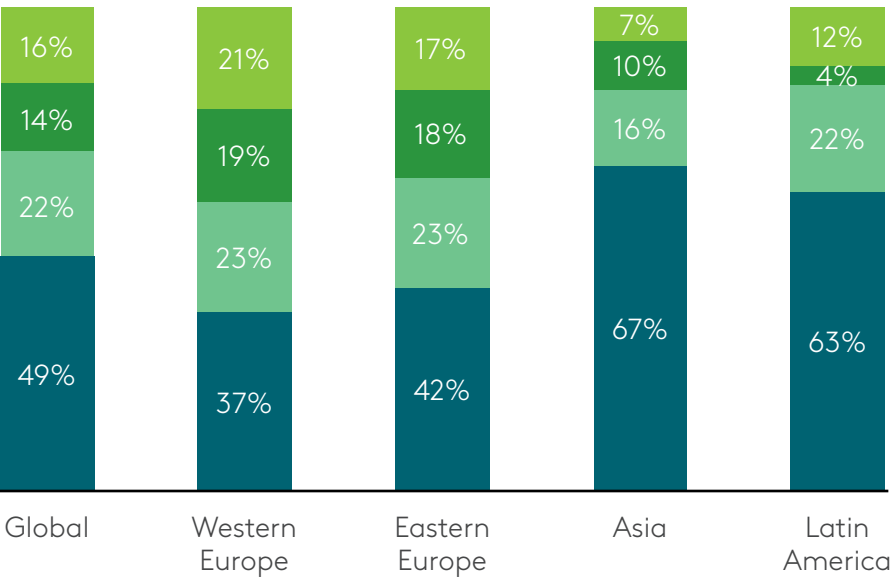
Source: Kantar, GfK

INTRODUCING THE SEGMENTS

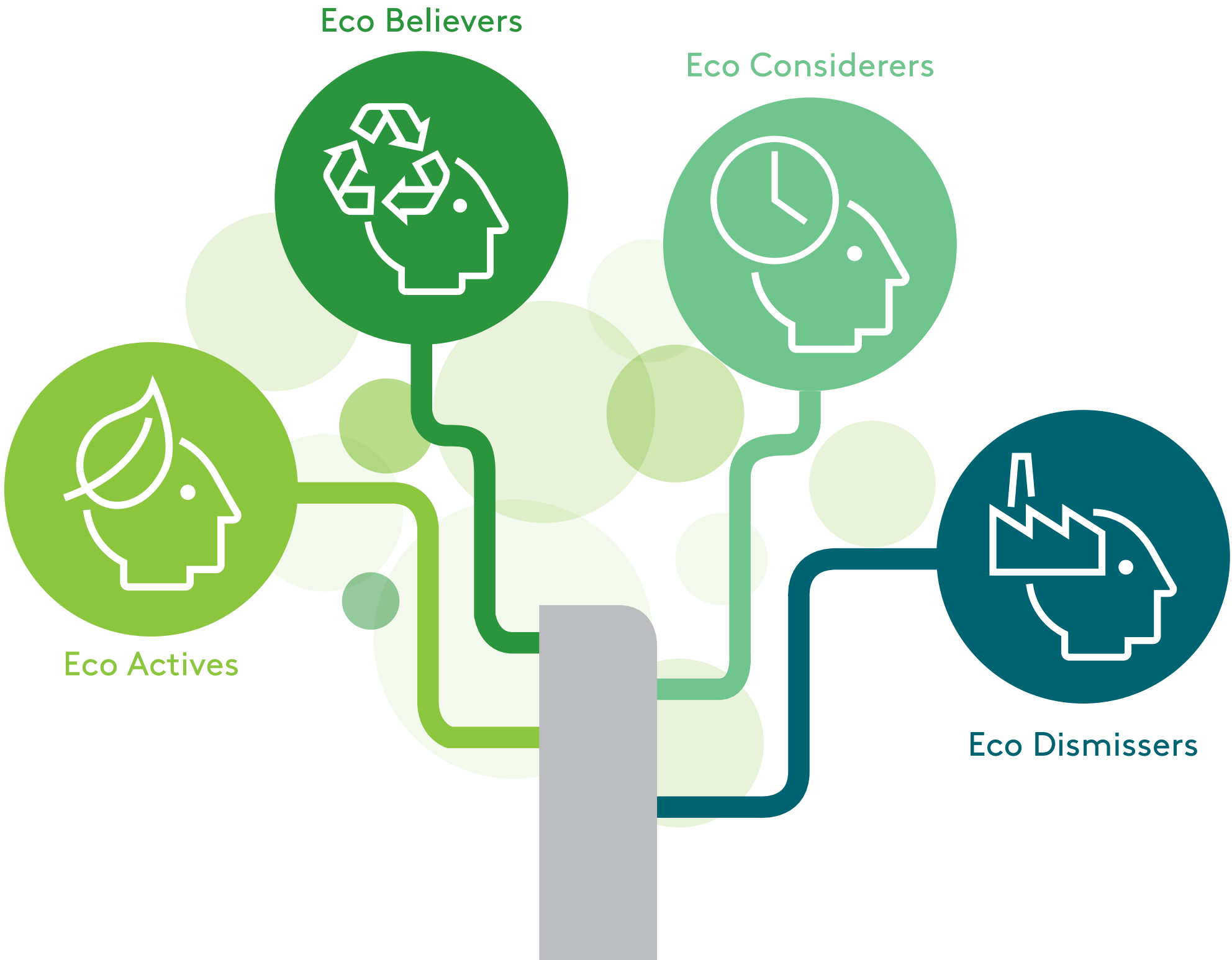
From the results of our global survey, we have created four unique customer segments. Each one highlights how different sections of the global population view environmental challenges—and how it impacts the choices they make in-store.

We have referenced the levels of concern shown by our research participants against the claimed frequency with which they take actions to reduce waste. As a result, four groups emerged: Eco Actives, Eco Believers, Eco Considerers and Eco Dismissers.

Eco segments by region



Source: Kantar, GfK

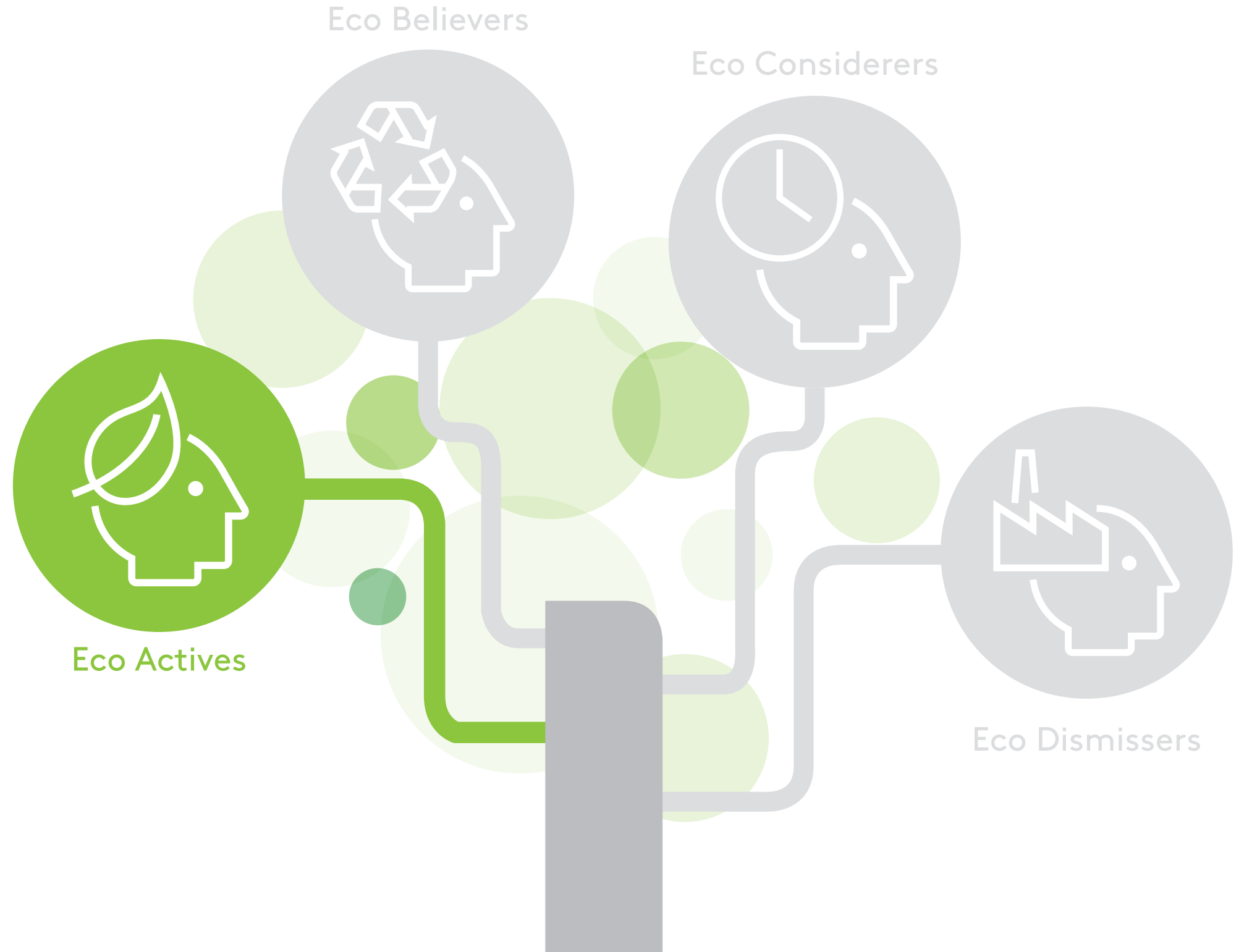


Eco Actives

Making up 16% of global consumers, these shoppers consistently work to reduce their levels of plastic waste. They always, or frequently, take active steps to improve the environment. They are more than twice as likely as other groups to avoid meat, plastic bottles and plastic packaging. They are also twice as likely to buy reusable beauty products than the next group, Eco Believers.

Eco Actives are vocal advocates of environmentally-friendly behaviour on social media. They have a “bottom-up approach”, believing that it is consumers themselves who bear the most responsibility for change than any other group.

This segment peaks at 21% in Western Europe but falls as low as 7% in Asia.



Eco Believers

This group highlighted plastic as a major concern. They take some actions to reduce their environmental impacts – such as using reusable cloth shopping bags instead of plastic bags – but less frequently than Eco Actives.

Eco Believers are more likely to be found in Europe than in any other region. They make up almost a fifth of shoppers in Western Europe (19%), compared to just 4% in Latin America.



Eco Considerers

People belonging to this segment do not see plastic as their biggest concern, but they do take infrequent actions to reduce their plastic waste.

Eco Considerers are faced with other challenges, such as managing their weekly budget, or negotiating time pressure which makes convenience their priority. They are also more likely than other groups to claim they cannot find environmentally friendly products.

The group is large in Latin America (22%, which is bigger than Eco Actives and Eco Believers combined) and makes up almost a quarter (23%) of shoppers in Western and Eastern Europe.



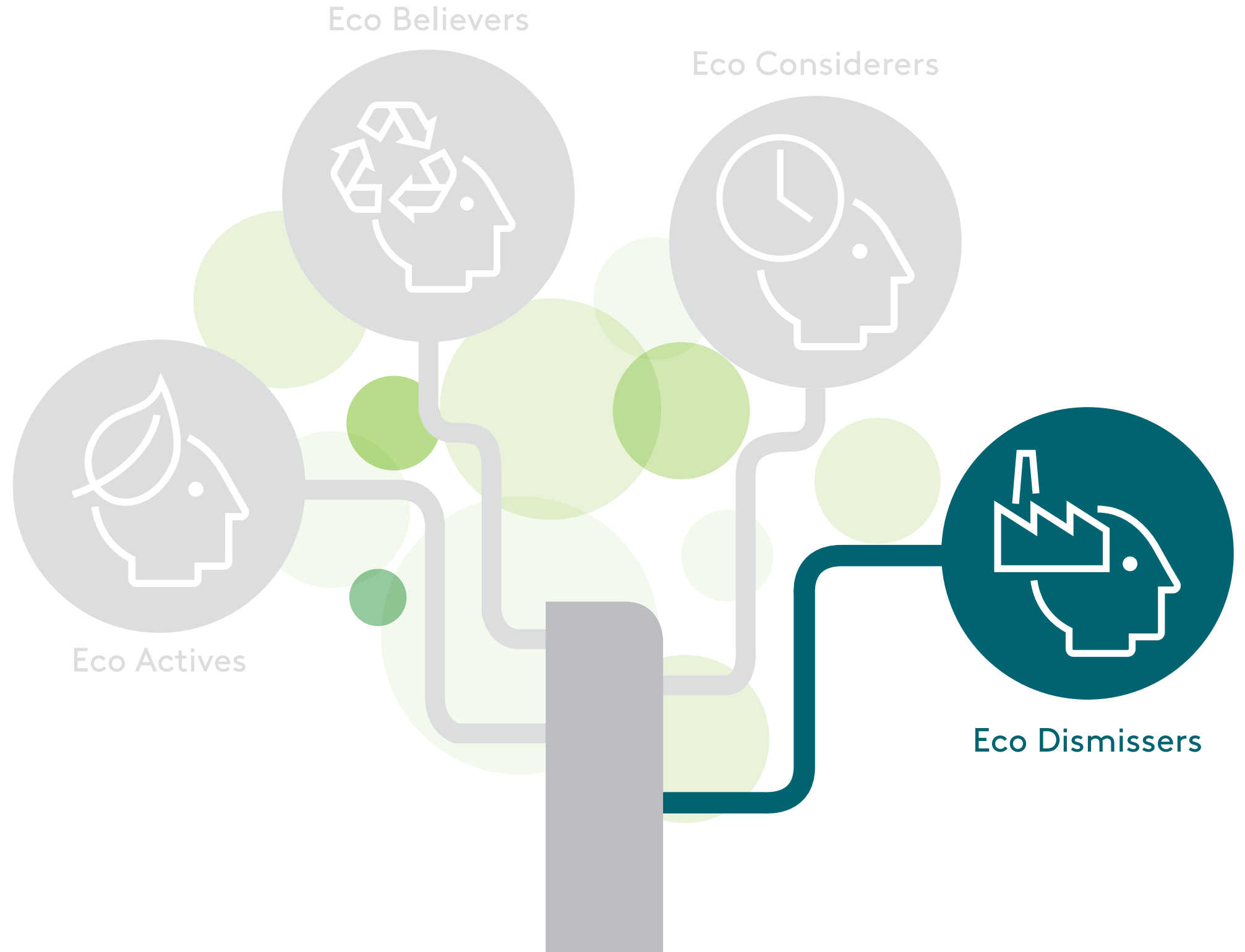
Eco Dismissers

Nearly half of the global population (49%) have little to no interest in the environmental challenges faced by the world and are making no steps to improve. This group are the Eco Dismissers.

The topic of plastics rarely features amongst the friends and family of Eco Dismissers, whose overall awareness of environmental issues is low. This peaks at 67% in Asia and is closely followed by Latin America (63%).

It could be that this group has other considerations and pressures such as lack of time, funds and energy to engage with environmental concern. Many actions that can currently be taken are inconvenient and require time on the part of the consumer, which might be in short supply.

Despite almost half of the population being Eco Dismissers, this isn't a reason to abandon the environmental cause. Opportunities lie with those who are most engaged.



FOCUS ON ECO ACTIVES

As the most engaged group from our segmentation, it is worth taking a closer look at Eco Actives. We can reasonably assume that the current behaviour of this group forms the blueprint of how less engaged segments could soon behave. Eco Actives are most present in markets such as Europe, where environmental concern is well developed and an omnipresent topic in the media.

As other locations gain more exposure and awareness of the challenges of plastic waste, we can expect the number Eco Actives to grow.



How do they act?

Eco Actives are twice as likely than the next group (Eco Believers) to frequently perform environmentally conscious actions. The majority of Eco Actives will avoid using plastic bags (80%) or single-use plastic drinking bottles (75%). 68% will use reusable beauty products and 66% will try not to buy products in plastic packaging, while 36% will avoid buying meat.

Proponents of individual responsibility, Eco Actives are 25% more likely to believe that the responsibility for reducing plastic waste lies with the consumer.

Actives are twice as likely than the next group to do these actions



Source: Kantar, GfK



Who are they?

In the media, it is younger people who are often painted as the most zealous environmentalists. For example, Greta Thunberg, the 16-year-old Swedish activist who began the international school strike for climate movement. However, the reality is that the Eco Actives we found as part of this survey are more likely to be older. This could be due to younger consumers leading more ‘on-the-go’ lifestyles, where convenience is prioritised above reducing plastic waste, whereas older consumers have more time to plan and prepare their alternatives.

% of Buyers who are over 50

% Buyer	Total Household Population	Amongst Eco Actives	Index
Argentina	48%	61%	128
Austria	53%	59%	111
Belgium	59%	69%	117
Brazil	39%	49%	125
Chile	59%	60%	103
Chinese Mainland	34%	33%	98
Colombia	54%	63%	118
Denmark	58%	73%	127
Germany	57%	67%	118
Hungary	49%	62%	128
Mexico	41%	42%	101
Netherlands	55%	74%	134
Peru	31%	41%	131
Spain	56%	67%	120
Sweden	38%	51%	135
UK	57%	65%	115

The table (left) demonstrates that 16 out of 17 markets have an over index of Eco Actives over the age of 50. Sweden is a notable example where this age group is heavily over indexed at 135. China Mainland is the only market in this sample to have a smaller proportion of Eco Actives in the over 50s than the population at large.

Source: Kantar, GfK



What do they buy?

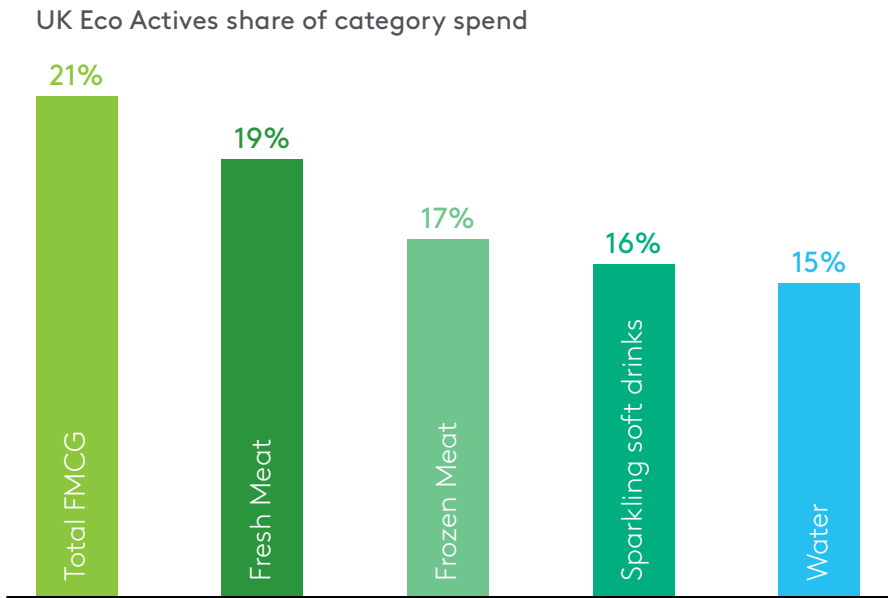
Eco Actives are less engaged in certain categories and, as such, are slowing overall category growth.

This group claims to avoid meat, and this is evident when we look at their purchasing. UK Eco Actives make up 21% of total FMCG spending, but only 19% of fresh meat and 17% of frozen meat. Their meat purchasing also reduced year-on-year by 6%, accounting for 80% of the category’s total value decline in 2019.

This group also only make up 16% of sparkling drinks and 15% of water spend. In the past year, however, we are yet to see a significant change in their purchasing of these categories—with the average change only being a 1% drop in packs.

A similar pattern is seen in Spain, where Eco Actives make up a significantly lower share of the beverages category compared to total FMCG (9% vs 13%). Spanish Eco Actives are also choosing different packaging within beverages—accounting for 34% of all eco water bottle sales and 17% of glass bottles.

However, unlike in the UK, Eco Actives in Spain account for the same spend on meat as on FMCG in total.

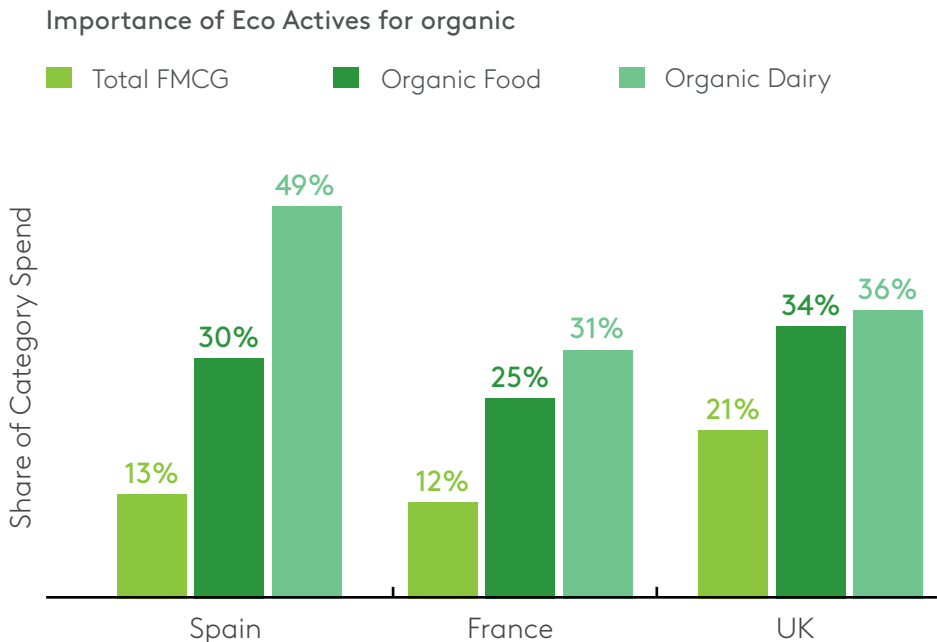


Source: Kantar

Eco Actives are also important to the bio and organic categories. In France, the penetration of organic dairy is 81% amongst Eco Actives compared to 61% in the total population, and the group accounts for 25% of organic food sales and 31% of organic dairy sales (vs 12% of FMCG).

Similarly, in Spain, Eco Actives account for 30% of bio sales (versus 13% of total FMCG), while in the UK they make up 34% of all organic food (versus 21% of total FMCG).

They choose eco brands when available. 56% of the sales of Ecover and 46% of those of Method – the eco-friendly cleaning brands – come from Eco Actives in the UK. We also



Source: Kantar

see the same pattern in France, where 72% of this segment purchase eco-friendly homecare and represent 25% of the spending on it (double their importance in FMCG).

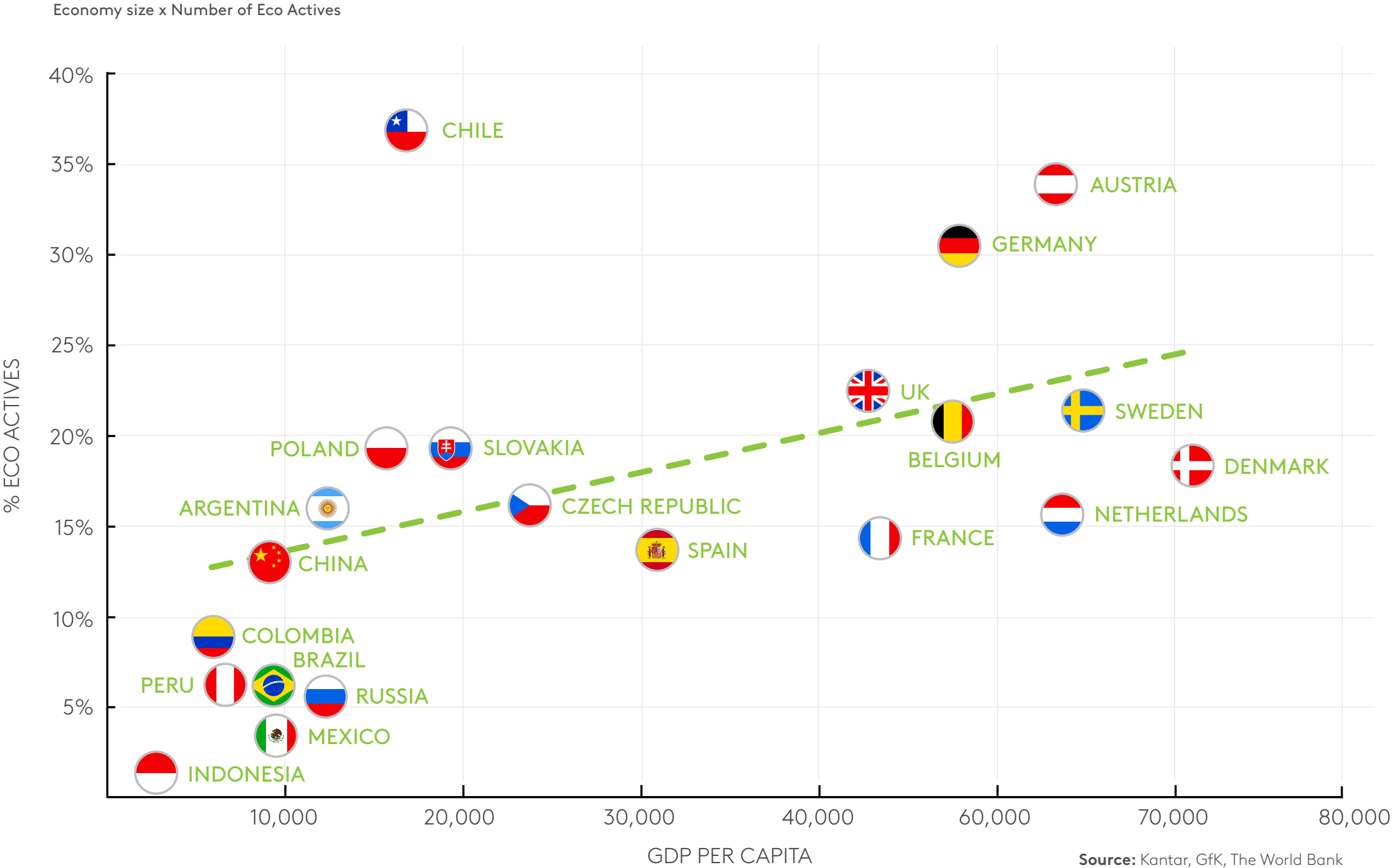
Despite the growing importance of Eco Actives, there are currently very few mainstream eco brands available across categories. This suggests that the group’s needs are not being well met, hinting at a significant opportunity for manufacturers looking to launch eco alternatives.

However, with only 41% of shoppers saying that they would be willing to pay more for recyclable packaging, new launches should not be targeted at only the premium tiers.



Where are they?

Overall, Eco Actives are far more prominent in countries with higher Gross Domestic Product (GDP). Nations such as Germany, Austria and the UK far outrank Mexico, Brazil and Peru, for instance. This trend suggests that as markets get wealthier, the focus on issues of environmentalism and plastics increases. In the future, we could expect to see the share of Eco Active shoppers rising in countries that experience growing GDP.



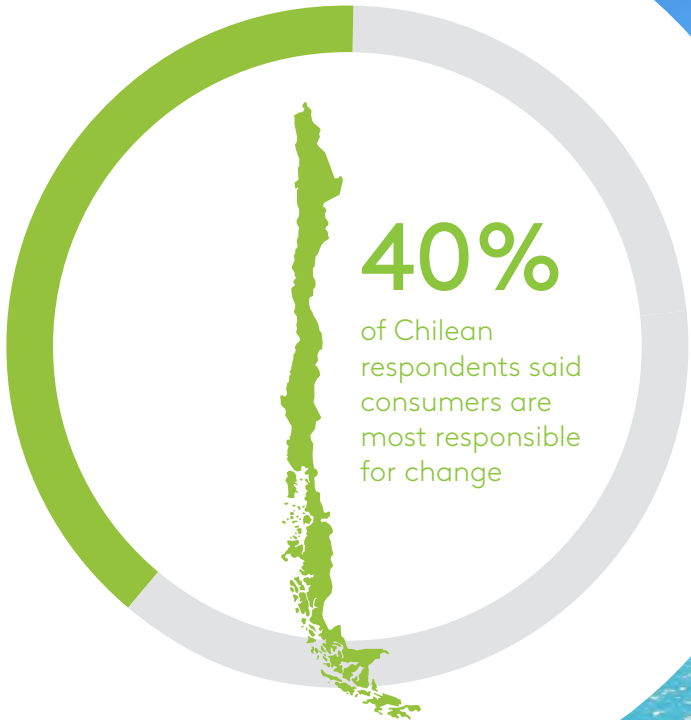
“IT’S UP TO ME”: FOCUS ON CHILE

Chile is a notable exception to this rule. It stands out as being the most engaged country globally, demonstrating that it is not only consumers in developed markets that are taking action over plastics. In fact, 37% of Chileans are Eco Actives, with only 22% Eco Dismissers—compared to 63% across the whole of Latin America.

This is because Chileans are more likely to take personal responsibility for making behavioural changes. 40% (twice the global average) believe that it is up to consumers to make the difference. Chileans are also three times as likely as other nationalities to write and share

articles on the environment with their social networks. This belief translates into some tangible practices. In February 2019, Chile became the first country in Latin America to ban plastic shopping bags—with 71% of the population now always taking bags with them to the shop. Since the ban was put into effect, the number of plastic bags has been reduced by 2.2 million.

In December 2019, Santiago will play host to COP25—the United Nation’s Global Climate Change Conference. The upcoming event is the cause for much excitement in Chile and a source of significant national pride.



Source: Kantar





“NO PLASTICS PLEASE”: FOCUS ON GERMANY

Plastic waste is the top concern amongst German consumers. They take clear steps to avoid using plastic wherever possible, and it’s no surprise that 30% of Germans are Eco Actives (compared to 21% across Western Europe).

In Germany, it is the retailers who have taken the lead on the environmental challenge. Re-usable bags are available to buy at point-of-sale in the vast majority of supermarkets and alternatives

to plastics are often available for delicate products. As a result, 76% of German shoppers claim that they will choose a fabric or paper bag at the checkout.

The table below demonstrates that German environmental concerns are not limited to plastic alone. Compared to the global index, they have a far more holistic view, being more likely to check packaging for reassurances on animal welfare, palm oil-use and more.

Top environmental concerns Global vs Germany

	Global	Germany	Index
Fairtrade	13%	30%	237
Animal welfare	12%	26%	212
Vegan	4%	7%	175
Organic/bio	18%	30%	172
Vegetarian	5%	9%	166
Recycled pack	13%	18%	144
Palm oil	22%	27%	124
Sugar	50%	62%	123

Source: GfK

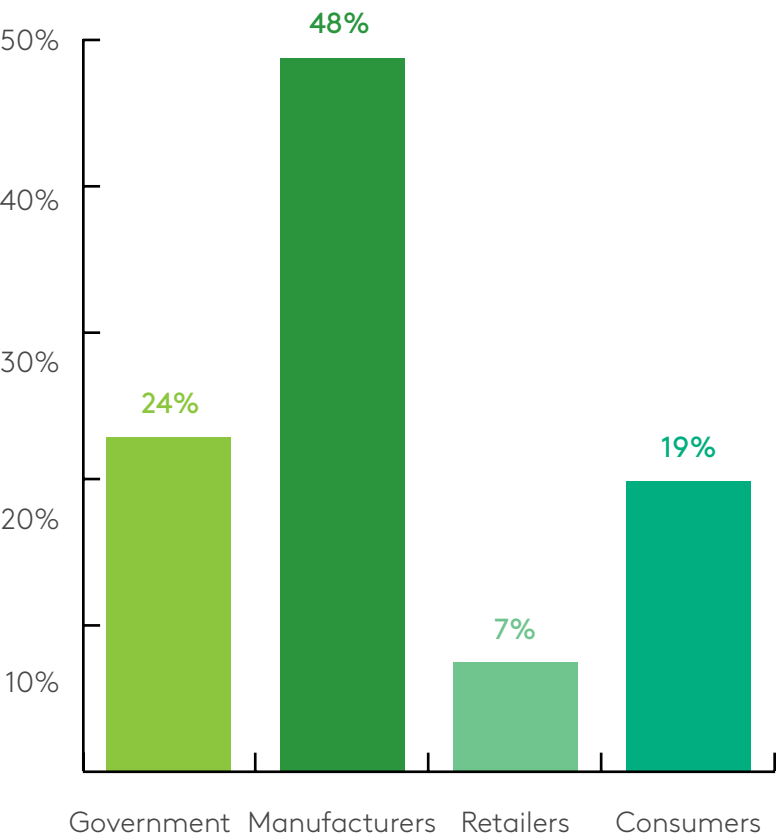
MANUFACTURER FOCUS

In recent years, FMCG manufacturers have started taking steps to tackle plastic waste. The growing public backlash against single-use plastic has made it impossible for brands to ignore the challenge—consumers are demanding action.

Responding to these changing attitudes, 57 FMCG companies have signed Ellen McArthur’s commitment to make 100% of their plastic packaging reusable, recyclable, or compostable by 2025. Furthermore, at least 40 will publicly track their plastic production including Colgate Palmolive, Danone, L’Oréal, MARS, Nestlé, SC Johnson, The Coca-Cola Company and Unilever.

Meanwhile, certain manufacturers are doing their bit to reduce the amount of plastic waste they produce. For example, P&G’s Head & Shoulders launched the world’s first recyclable shampoo bottle made from recycled beach plastic. Similarly, light-weighting initiatives, or reducing the amount of material to create packaging, across Unilever’s skincare products – Vaseline, Dove and Simple among others – reduced the group’s plastic consumption by 1,100 tonnes in 2018.

Who should act on plastic waste?



Source: Kantar, GfK

Manufacturers: It’s up to you

However, consumers are not recognising the important steps being taken by brands to tackle the challenge. Manufacturers are seen as the most responsible for acting on plastic waste (48%), however, only 12% of consumers can name one doing a good job.

Conversely, only 19% of consumers believe they should be taking personal responsibility for their waste, 24% place government at the top of the list, and 7% place the responsibility on retailers. This highlights the need for manufacturers to publicise their efforts to reduce plastic waste more effectively.

There’s a clear gulf between the work manufacturers are doing and the public’s understanding of the initiatives being taken. Therefore, actions that reduce plastic waste in the supply chain, while beneficial, will not demonstrate the same uplift in positive sentiment as clearly visible point-of-sale changes.

Where does waste come from?

The sources of plastic waste vary greatly depending on the region.

In Western Europe, food packaging is the biggest culprit (81%), followed by packaging for household and personal care products (58%), disposable drinks bottles (52%), packaging for fresh fruit and vegetables (37%), shopping bags (17%) and, finally, plastic capsules used for making tea and coffee (14%).

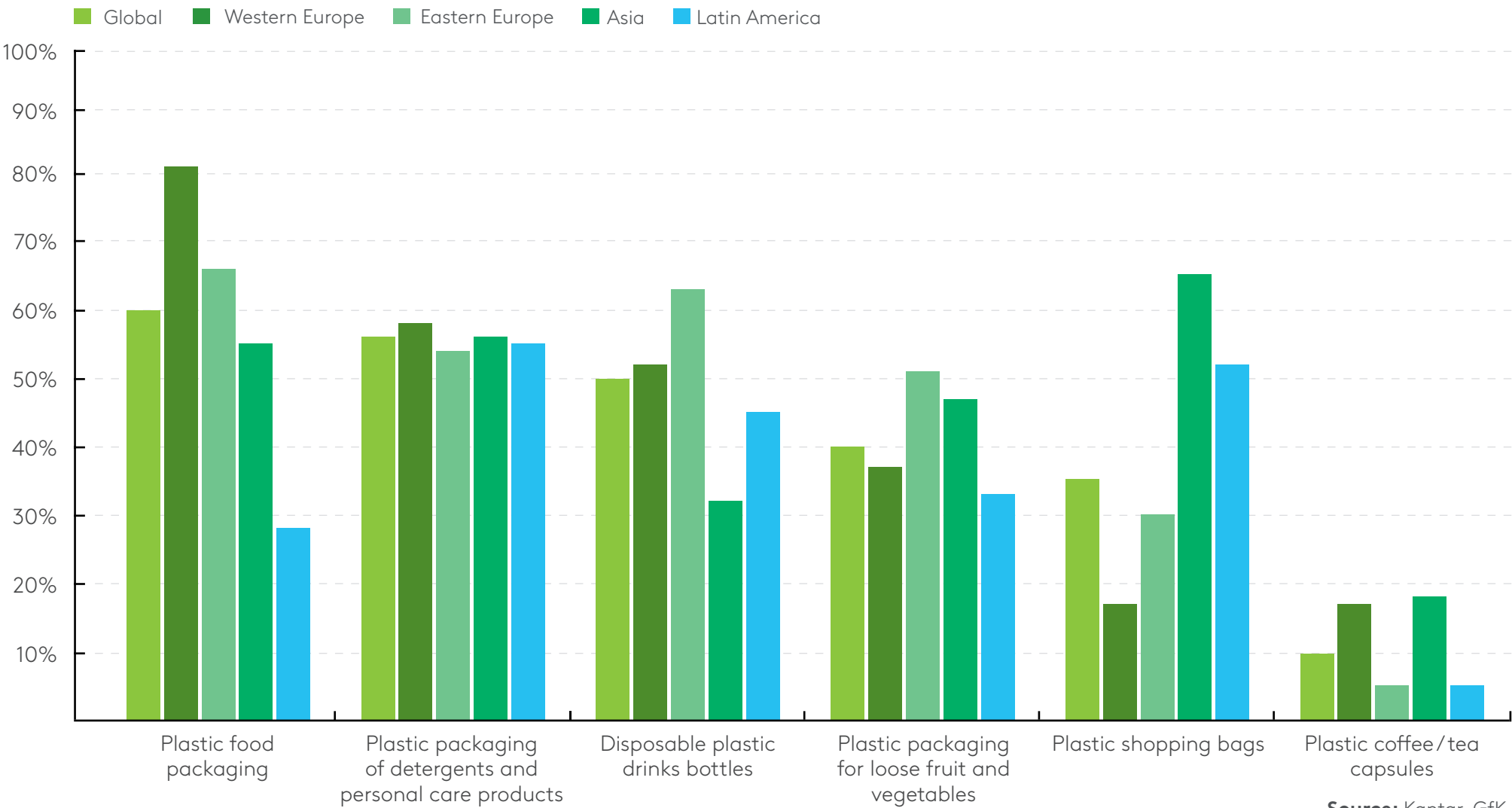
In Asia, by comparison, the figure for shopping bags (65%) is much higher. Plastic food packaging is the primary concern in Eastern Europe (66%), followed by drinks bottles (63%).

These differences suggest that manufacturers should consider adapting how they communicate messages around sustainability according to the region.

In Western Europe, for example, brands should focus on tackling plastic food packaging, while household and personal care brands in Latin America need to take a stronger stand against packaging waste than other categories.

It also shows that, once quick wins such as banning plastic bags have been implemented, consumers will quickly turn their attention to other offenders.

What are the three biggest contributors to plastic waste in your household?



Source: Kantar, GfK

The actions consumers want manufacturers to take

When considering the steps manufacturers should take to limit plastic waste, some clear trends emerge. Globally, the most important step for brands to take is to use alternatives to plastic packaging—44% of consumers place using non-plastic as the most important tactic for reducing waste.

Using recyclable packaging (44%) and reducing the amount of plastic used (42%) were the next most important approaches, followed by offering biodegradable options (34%) and deposit systems (33%).

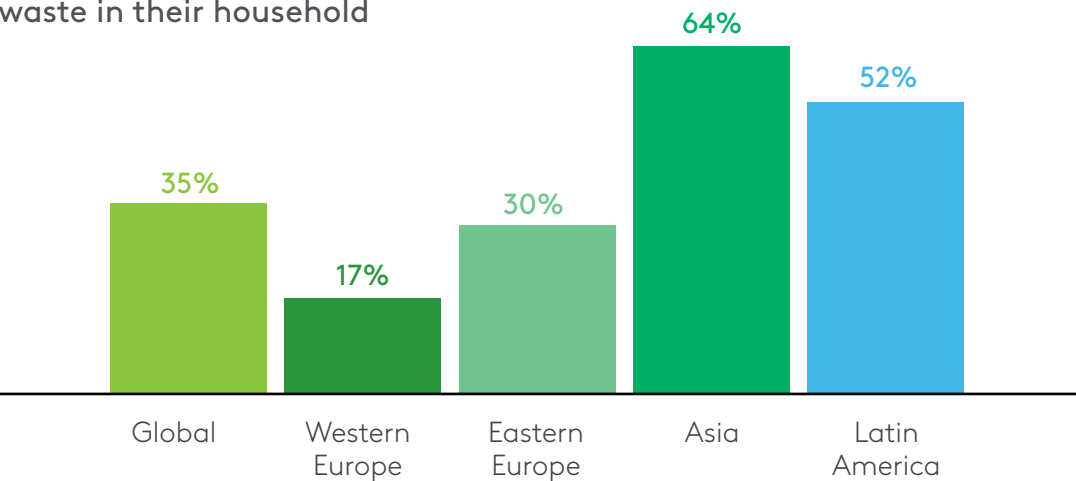
RETAILER FOCUS

In the eyes of consumers, retailers are doing a better job of reducing plastic waste than manufacturers.

Driven by a series of high-profile initiatives across the globe, 18% of consumers can name at least one retailer taking positive action. From simple measures such as charging for plastic carrier bags or installing recycling hubs, to more complex arrangements like removing packaging from the supply chain, supermarkets are increasingly aligning their strategies with shifting consumer attitudes towards waste.

In a move that will save two tonnes of plastic a year, Tesco has become the latest UK supermarket to stop using plastic carrier bags to deliver online groceries. Furthermore, Morrisons has pledged to completely remove packaging from its fruit and vegetables—enabling customers to buy them loose or wrap them in recyclable paper.

% of respondents naming plastic shopping bags as one of the three biggest contributors to plastic waste in their household



Source: Kantar, GfK

FOCUS ON LATIN AMERICA

Consumers in Latin America were the most familiar with retailers’ efforts to tackle plastic waste—with 21% able to name at least one outlet taking positive steps. In Peru, this figure rises to 39%, where Plaza Vea received the greatest number of mentions due to the introduction of its bag-charging scheme and on-premises recycling facilities—which also helped the retailer grow its penetration and loyalty in 2019.

And with more than half (52%) of consumers citing shopping bags as their primary source of plastic waste in Latin America, there is still plenty of room for retailers to make an impression by charging for bags.

What steps do you want retailers to take?



What consumers want
When it comes to tackling plastic waste, there are a number of actions that consumers want to see from retailers. The chart on the left shows the areas they want to be prioritised.

Top of the list (43%) is that consumers want to see less plastic packaging used for fresh food. They would also like the removal of plastic bags for fruit and vegetables (39%), the use of alternatives to plastic packaging for fresh food (36%) and, for any plastic packaging that does have to be used, for it to be 100% recyclable (32%).

Factors such as financial support for global initiatives – the cleaning of plastic from the oceans, for example – ranked lower (16%), suggesting that consumers would rather see direct action that impacts their experience in the shopping aisles.

Source: Kantar, GfK

RETAILERS RESPONDING



Rimping (Thailand)

Using a natural and biodegradable resource that is readily available in Thailand's tropic climate, Rimping is trialling the use of banana leaves to wrap fresh fruit and vegetables. The eye-catching displays have been a huge success in-store and have attracted attention around the world for their simplicity and effectiveness.



Morrisons (UK)

As well as removing plastic packaging from fresh fruit and vegetables, Morrisons began allowing customers to bring their own reusable containers to its meat, cheese and fish counters. In our verbatim responses, the chain was acknowledged as the retailer doing the most in the UK, and it saw its share of market spend among Eco Actives rise 0.5% in 2019.



Carrefour (France, Spain)

Carrefour has launched Carrefour Bio in France and Spain, an area of its supermarket dedicated to selling plastic-free products. Indeed, 98% of its everyday items are now sold without any packaging, and customers are encouraged to purchase staple foods in bulk, in order to reduce their environmental footprint.



NOW IS THE TIME FOR ACTION

Taking action on plastic waste needs to be a case of 'when' rather than 'if' for manufacturers and retailers. Pressure from shoppers and a raft of strict new legislation from local governments means ignoring this issue could be fatal for brands.

With Eco Actives making up 16% of all shoppers, certain segments of the global population appear to care about the issue more intensely than others. Eco Actives expect manufacturers to lead the way—and we predict this group will continue to expand in the future as awareness grows.

We're already seeing small reductions in spending on meat, bottled drinks and categories such as beauty wipes. As Eco Actives become more prominent, some categories could experience reduced growth.

If we take a market that is clearly impacted, such as fresh meat in the UK, we can see this group's decisions have removed 1.4% from the total market value of the category. If this trend continues and the group grows to the size we see in Germany, fresh meat could drop by up to 4% in the next two years.

Only a few brands are currently offering products targeting the Eco Actives group, but our study shows there is high demand for eco-friendly products that are competitively priced and readily available.

However, consumers are often not willing to pay more for these products and the most engaged group does not necessarily have a higher income than others. The responsibility, therefore, is on manufacturers to offer a competitive, price-sustainable option.

There are key actions that all manufacturers and retailers should focus on if they are to meet these new consumer demands.

Manufacturers should:

- Replace and remove plastic from products in as many cases as possible—and position the 'no plastic' message alongside other benefits, such as natural ingredients.
- Focus on communicating brand activities to the end consumer, such as through on-pack or point-of-sale materials. There is an open space here for manufacturers to own.
- Tailor messages to address the different local concerns that are critical to consumers by market.

Retailers should:

- Start by removing packaging from products in the fresh aisles.
- Push reusable bags and charge for plastic ones in Latin America and Asia, in the markets which are not already doing this.

ABOUT KANTAR

Kantar is the world's leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else. Combining our expertise in human understanding with advanced technologies, Kantar's 30,000 people help the world's leading organisations succeed and grow.

FIND OUT MORE

If you'd like additional information on *Who Cares, Who Does?*, please get in touch with your usual Kantar contacts or email:

Natalie Babbage, Kantar
Global LinkQ Director
natalie.babbage@kantar.com

Richard Herbert
Global Insight Director, Europanel
richard.herbert@europanel.com

Oliver Koll
Strategic Insights Consultant, Europanel
Professor, University of Innsbruck
oliver.koll@europanel.com

John Truelove
Europanel Solutions Director
john.truelove@europanel.com

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