



# Sustainable Developments

**Understanding sustainability  
attitudes in 2022**

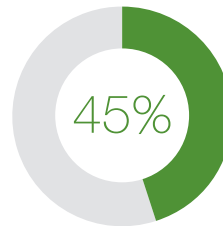
In a world in which issues around climate change and a global pandemic are ever-present in the news, consumers have become understandably more concerned about the impact of our food system on human health and the well-being of the environment.

These concerns are motivating people to become more sophisticated in their understanding of these issues, which means they have higher expectations than ever for brands to align with their values around sustainability.

The concept was already a business imperative prior to 2020, but the pandemic – along with an increasing number of high-profile weather events – have underscored the extent to which human activity may be impacting the environment. For many consumers, these issues are no longer taking place “somewhere else,” and they are now expressing more personal commitment to make choices with sustainability in mind.

But what this means for brands in 2022 is a moving target, given the high levels of stress many consumers are facing. Research firms that have long followed sustainability attitudes set out to find what effect these events have had on consumers' commitment to sustainability. They found that consumers are doubling down on their efforts to make sustainable choices.

According to insights in the 19th annual sustainability survey from the Natural Marketing Institute/Research America, Inc., consumers now realize that sustainability is not something that can be put on hold, and they are showing more sophistication about sustainability's breadth, depth and implications.<sup>1</sup> In other words, consumers now feel a stronger sense of personal responsibility about these problems than ever before:



**45%** of respondents said they were extremely/very willing to make personal sacrifices of time, money or convenience to protect the environment and planet.

Source: Sustainability: It's Changing, It's Hope-filled, It's Critical Business." 2021 State of Sustainability in America." Natural Marketing Institute/Research America, Inc.

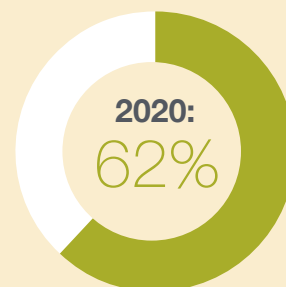
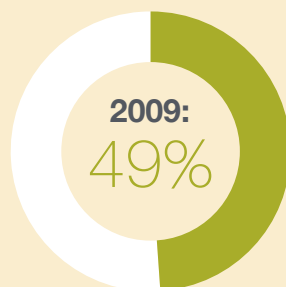
This attitude is most prevalent among consumers under the age of 40, who said this at rates of at least 50%.

While there are likely numerous reasons for these attitudinal shifts, a key driver of increasing consumer sophistication about sustainability is that they are connecting the dots between a broad range of related issues. The NMI findings suggest, for example, that wider adoption of sustainable attitudes and behaviors is likely tied to growing understanding that personal health is linked to environmental health.

The Hartman Group, which has also tracked sustainability for many years and fielded a survey in mid-2021, reported that these connections now go even further. Consumers, for example, are starting to make connections between issues involving the environment and social well-being. In turn, this is prompting them to make sustainable purchase decisions for a wider range of reasons,

## Agree with the statement:

*"I feel more personally responsible for protecting the environment than I have in the past."*



+27%  
growth

including benefits to farms and workers, to support the environment, and to benefit their own personal health.<sup>2</sup>

The ideas of sustainability are also expanding to a broader consumer base. NMI saw an increase in sustainability concerns among its conventional respondent segmentation, who have tended to be older and traditionally more practical and cost-driven. As these consumers reach retirement, NMI analysts surmise they may be making more-sustainable choices to benefit their children and grandchildren.

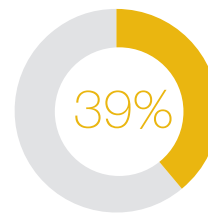
As these issues become top-of-mind for more people, consumers are looking for companies and government to take the lead and support actions that show real sustainable impacts.

That noted, there is still a disconnect between the share of consumers who say they are aware of sustainability and those who are willing to pay extra for products from companies that support these values. While about 7 in 10 consumers express this willingness, only 22% say they can identify a sustainable product and even fewer (17%) note they can identify a sustainable company.<sup>3</sup> Hartman analysts believe this may be primarily due to fast-changing goals and definitions around sustainability, rather than a dearth of knowledge. They noted that consumers may struggle to understand which companies best address their concerns.

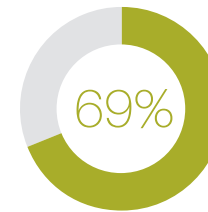
For brands, this means homing in on initiatives that they can do well and that have demonstrable results. Here are some emerging trends:

## Counting carbon

The United Nations' Global Compact for 2030 has shined a light on sustainable development goals and increased awareness about environmental measures such as carbon emissions. As a result, carbon neutrality is a measurement that is gaining recognition among consumers,<sup>4</sup> who now note they are more aware of third-party certifications around this benchmark.



**of consumers say they know a little/a lot about the Certified Carbon Neutral claim (+10% since 2019).**



**of consumers aware of the Certified Carbon Neutral claim say it makes them much/somewhat more likely to buy products with the label.**

Source: The Hartman Group. "Sustainability Today: Carbon Neutral."

In response, companies are looking at carbon emissions across their supply chains and implementing initiatives to reduce emissions from farming practices, logistics and transportation, as well as using renewable energy when possible.





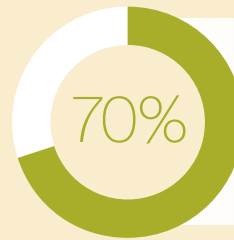
## Purposeful packaging

Packaging is another key consideration, as consumers report particular concern about the impact of single-use plastic on the environment and human health, which is one of the more visible sustainability issues.<sup>5</sup> According to data from the Hartman sustainability study, 83% of consumers now note they are concerned about use of these plastics. However, almost as many (73%) said that while they want to use less plastic, they don't know how.

This underscores an important opportunity for companies to create new packaging solutions that also offer the convenience consumers expect. This is inspiring companies to eliminate single-use plastic and develop more circular solutions, such as packaging made with recycled, compostable or renewable materials.

Another way companies are working to reduce their waste stream is by creating upcycled foods and beverages from surplus ingredients.

**Consumers are becoming progressively interested in this concept:**



**of consumers aware of the Upcycled Certified label say it makes them more likely to purchase a product.**

Source: The Hartman Group. "Sustainability Today: Upcycled Foods and Beverages."

Although consumers may not yet have a deep understanding of waste streams, Hartman analysts suggest they will continue to try and control what they are aware of for environmental and economic reasons.



## Sustainable supply

Beyond the upcycling of waste ingredients, companies are also working to analyze their supply chains and create new ingredient solutions in more sustainable ways. Plant-based ingredients are a key part of this trend, especially as brands turn to plant-based proteins like peas, which can provide robust protein content in many applications. Yellow pea varieties, in particular, are now a functional solution in products that not only serve as a beneficial rotational cover crop, but are also natural nitrogen fixers – minimizing farmers' need to add it to the soil, which can cause environmental issues downstream.

Another emerging trend is the use of fermentation to create new ingredients that would otherwise be unsustainable and commercially impractical. A case-in-point is sustainably produced stevia sweeteners from the sweetest components in the stevia leaf, Reb M and Reb D. These sweet compounds comprise less than one percent of the stevia leaf, so producing the ingredient through traditional agriculture was unsustainable. This led Cargill and DSM to form a joint

venture which pioneered the use of fermentation to produce these steviol glycosides using less water and a smaller carbon footprint.

To measure the impact, the companies conducted a Life Cycle Analysis of the EverSweet® ingredients. The results showed that EverSweet produces a 60% lower carbon footprint, uses 70% less land and contributes other benefits, such as biodiversity and water conservation.

Such efforts will fundamentally take sustainability to a new level as companies step up to meet growing consumer expectations for new solutions and leadership in sustainable food and beverage production.

## Learn more about Cargill's sustainable approaches to stevia production:

[cargill.com/sustainablestevia](https://cargill.com/sustainablestevia)

EverSweet® is a product of Avansya, a joint venture of DSM and Cargill.

<sup>1</sup> Ray, D; Nash, J. "Sustainability: It's Changing, It's Hope-filled, It's Critical Business." 2021 State of Sustainability in America." Natural Marketing Institute/ Research America, Inc.

<https://www.nmisolutions.com/natural-marketing-institute-releases-its-2021-state-of-sustainability-in-america-consumer-insights-trends-report/>

<sup>2</sup> The Hartman Group. "Sustainability 2021: Environment and Society in Focus."

<sup>3</sup> The Hartman Group. "Sustainability Today: The Opportunity Gap." October 28, 2021.

<https://s3.us-west-2.amazonaws.com/storage.www.hartman-group.com/infographics/fullsize/OgVd0NDhrFTF4HArnfJr5q2uq1X3Zmct94zzFJQs.pdf>

<sup>4</sup> The Hartman Group. "Sustainability Today: Carbon Neutral." December 2, 2021.

<https://www.hartman-group.com/infographics/75447285/sustainability-today-carbon-neutral>

<sup>5</sup> The Hartman Group. "Sustainability Today: Single-Use Plastic Waste." December 9, 2021.

<https://www.hartman-group.com/infographics/1293661666/sustainability-today-single-use-plastic-waste>