



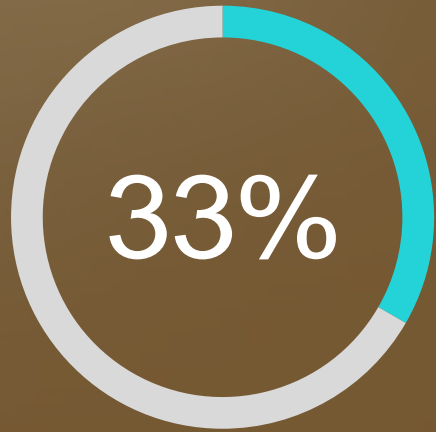
I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living...

awareness of  
Eco- planetary limits **Rise of scrutiny**  
incubators **blockchain revolution**  
intense media resource scarcity **activist**  
coverage **local initiative** investment  
**conscious lifestyle change**  
in-home contamination scanners **shifting**  
**rise of innovation for** **regulation**  
**sustainability** Sustainable  
as premium

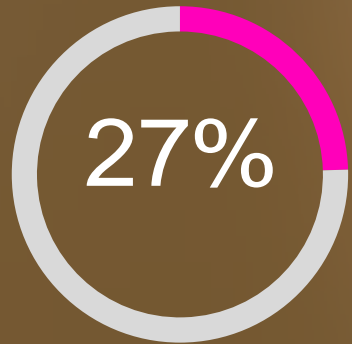


# Responsible LIVING

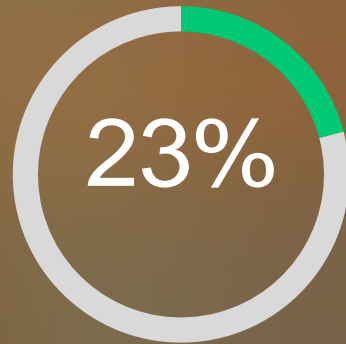
*"I mainly buy from companies who have a clear, committed environmental policy for environmental reasons"*



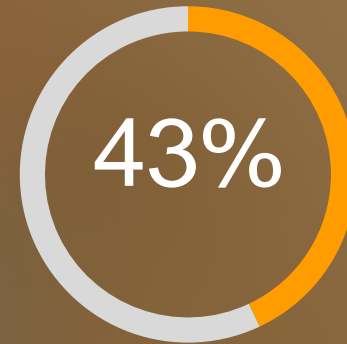
**Global**  
+1% since 2015



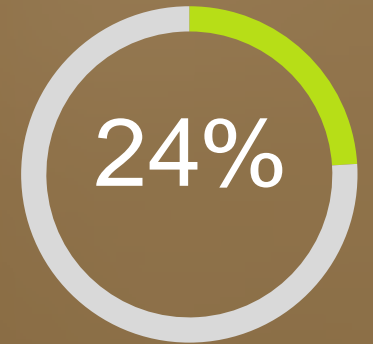
US (+1%)



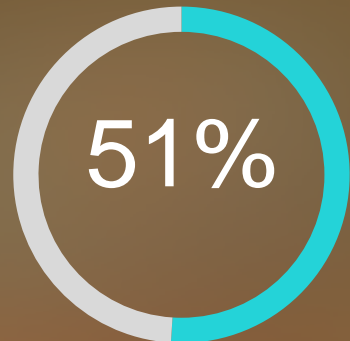
UK (+2%)



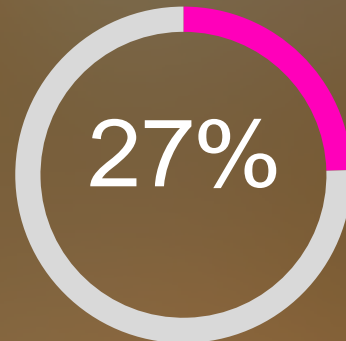
Mexico (+5%)



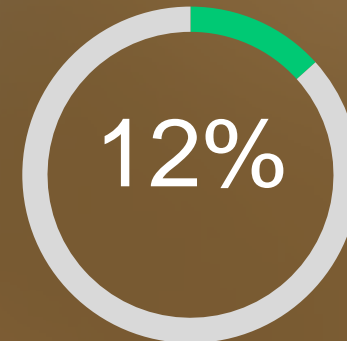
Germany (-2%)



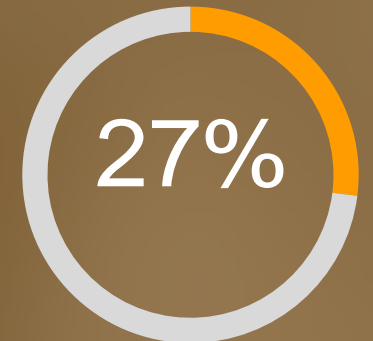
China (+4%)



Malaysia (~)



Japan (~)

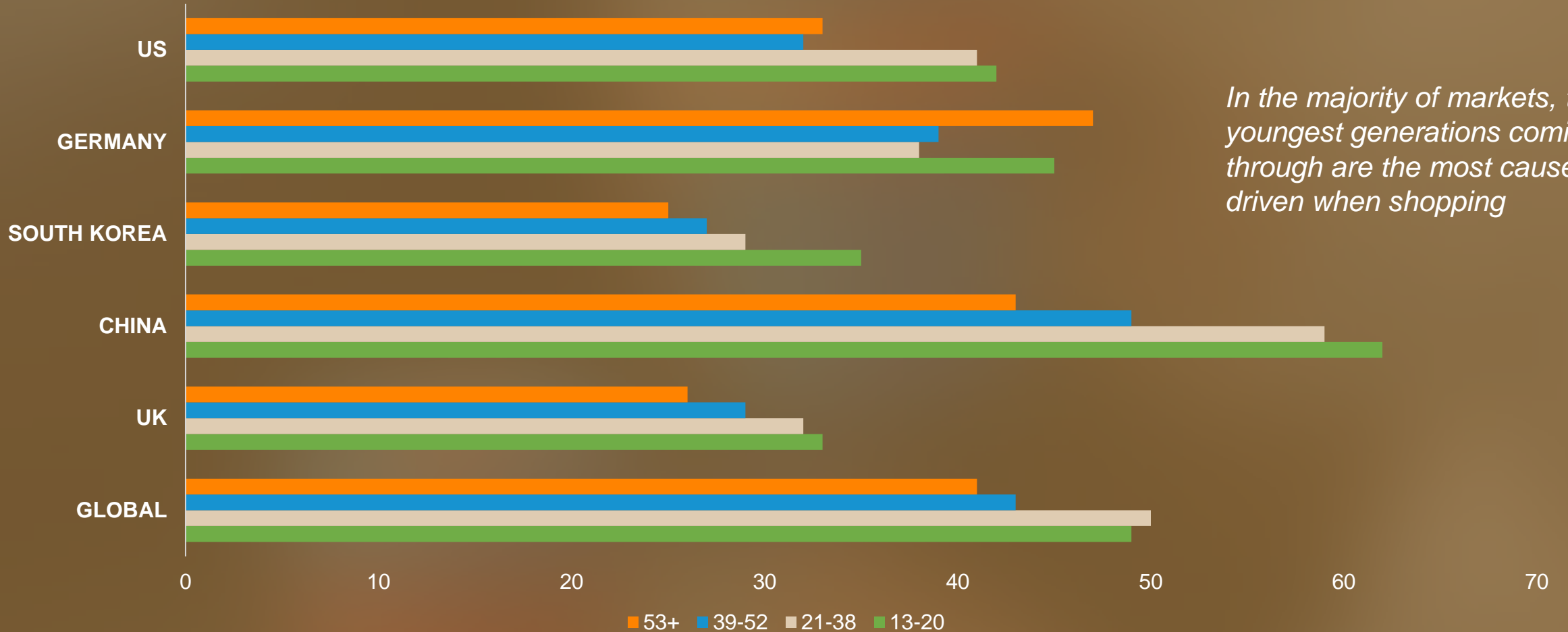


South Korea (+6%)

*The subset of highly environmentally-conscious consumers is small but growing fast in most markets...*

# Responsible LIVING

“I make an effort to buy products from companies that support causes I care about”



*In the majority of markets, the youngest generations coming through are the most cause-driven when shopping*



## WHAT'S DRIVING THE TREND?



### Increasing Environmental Pressure

Consumption and production patterns will be significantly altered by increasing resource constraint. Awareness around sustainability is becoming part of mainstream consideration.

A third of consumers (33%) are now actively choosing to buy from brands they believe are doing social or environmental good.<sup>1</sup>



### Rise of protectionism and nationalism

There has been a surge of support for political and economic insularity, with rising advocacy for protectionist measures, from an industrial and environmental point of view.

As tariffs are imposed against imported goods, consumers turn away from products made or grown in far away locations and will turn to local products where they can see the value as well as the clear journey the product has taken before landing on their plate.<sup>4</sup>



### Rapid Urbanisation

Urban populations are rapidly increasing, having significant impacts on food systems and driving intensive farming. It also drives a proliferation of premium, sustainable brands in urban areas.

More than 80% of people living in urban areas are now exposed to air quality levels that exceed safe limits.<sup>6</sup> Food production is one of the leading causes of air pollution and governments are under growing pressure to open new avenues of cleaner production.

## WHAT'S DRIVING THE TREND?: DRIVERS



### Increasing Environmental Pressure

120 million more hectares of natural habitat need to be converted to farmland to meet demand for food by 2050. <sup>1</sup>



### Rise of Protectionism and Nationalism

From January 2018 China has banned imports of plastic waste from other countries. <sup>2</sup>



### Rapid Urbanisation

Cities are responsible for 67% of the total global energy consumption and more than 70% of greenhouse gas emissions



# Responsible LIVING

## HOW IS IT MANIFESTING?: SUB-TRENDS

### Supply Chain Laid Bare

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Increasingly powerful and accurate technologies will provide proof of this from independent sources.

### Innovating against waste

War on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream

### Eco-Status

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are premium in look and feel, and are markers of status

### Local Action

With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies

# Responsible LIVING

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Interest in provenance remains as relevant as ever and is enhanced with powerful and accurate technologies which provide proof from independent sources

## SUPPLY CHAIN LAID BARE



Every product has a story

We enable great businesses to build trust in their goods and supply chain. Provenance powered data helps shoppers choose your product.

[JOIN FOR FREE](#)

### HOW IS THIS MANIFESTING?

Through the eyes of our Streetscapers...



Japan

“Higher productivity and overwork are the key issues that get media attention, there is no mainstream awareness of the sustainability aspect of manufacturing”.

Patrick, Japan



USA

“Technology is improving our food systems with ingredient tracking techniques like blockchain and innovation to food production”

Vincent USA



# Responsible LIVING Supply Chain Laid Bare



Walmart and IBM have partnered to create the **first blockchain tracking system for food** for a major retailer, cutting down the time it took to track produce from six days to two seconds.<sup>1</sup>



Tony's Chocolonely, Germany uses bean tracking (blockchain) technology to ensure 100% slavery free chocolate

The first in the snacking space to invent this kind of accreditation



Spinneys Supermarkets in the UAE provides in-store codes to track product journeys

Next-level demands for traceability are evolving globally, not just in the West



# Responsible

LIVING

The war on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream



## INNOVATING AGAINST WASTE



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*



Chile

*“Plastic bags are a real pain. We are so used to them that sometimes it is ridiculous, it’s like we don’t realize the harm we are doing with this kind of behaviour. The government is working on a decree to ban plastic bags as soon as January 2019.”*

*Stefano, Chile*



USA

*“...there is a near futurology that most Americans could see themselves using completely new, sustainable, lab-grown foods and materials in the next few years”.*

*Vincent, USA*

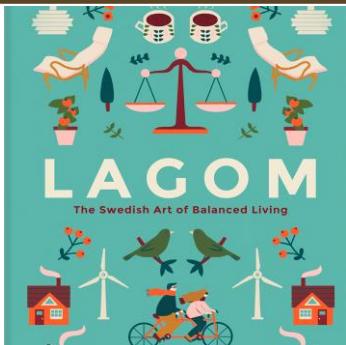
# Responsible

LIVING

## Innovating Against Waste



KeepCup, the Australian reusable cup brand, sold a **quarter of a million** of their barista-standard cups in the UK in the run up to Christmas - the biggest three months of sales in its history and just before the 25p “latte levy” was imposed.



Using an existing by-product in agriculture - Piñatex is a natural textile made from pineapple leaf

Creating additional income streams for farming communities as well as a sustainably sourced, high-fashion material



Eliminating waste from the consumption cycle - Plastic Eating Enzymes

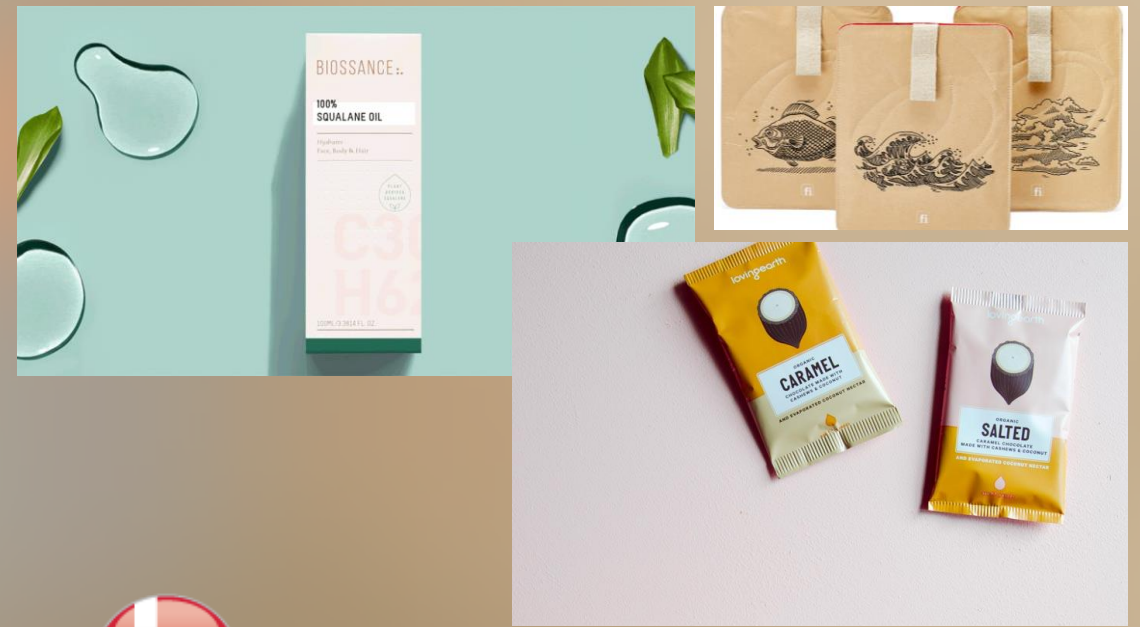
Scientists in Japan & the UK have created a mutant enzyme that breaks down plastic drinks bottles



# Responsible LIVING

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are on-trend and are markers of status

## ECO-STATUS



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*

*"We see that the next generation is more conscious of sustainability, where their food comes from and their carbon footprint and are making everyday choices that have longer-term impact"*

*Zaina Kanaan, UEA*



United Arab Emirates



Denmark

*Tackling the next big environmental problem: fast fashion. It is a signal of pride to wear environmentally sustainable clothes brands which are creating limited products following three key principles: quality, sustainability and pride"*

*Kinvara, Denmark*



# Responsible

LIVING  
Eco-Status



The ethical products and services sector in the UK has grown by more than £40bn since 2008 and is now worth **£81.3bn** (Financial Times, 2017)



**Michelin star 'The Perennial' in San Francisco reinvents classic dishes within a zero waste 'loop'**

The Perennial grows its veg with restaurant compost and even makes resin and varnish for the interiors from cooking by-products



**The Giki Food app is a catalogue of sustainable, premium suppliers with ratings against different values**

Consumers can make fully informed decisions on how brands match up in the metrics that matter the most to them

# Responsible

LIVING

Consumers continue to find their own community solutions and initiatives, but proactive businesses are becoming part of the local, social fabric too

## LOCAL ACTION



### HOW IS THIS MANIFESTING?

*Through the eyes of our Streetscapers...*



United Arab Emirates

*"Local ethical concerns are still largely unattended, UAE is mostly built on international concepts and franchises and aspirational attitudes, there will be trickle down effect from trends in the west"*

Zaina, UAE



USA

*In the US Hyperlocal marketing allows brands to communicate to a group of individuals with similar interests in a specific community or neighbourhood. Mondelez's brand, Ritz Bits, recently sponsored over 1,000 youth soccer teams across the US and built positive relationships with team parents in the process.*

Vincent, USA

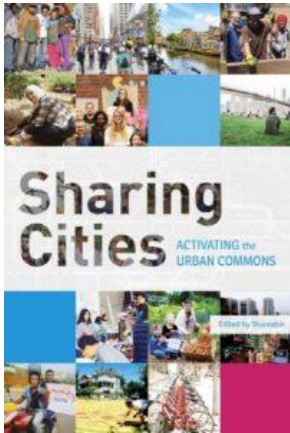


# Responsible

LIVING  
Local Action



47% of 21-38 year olds actively buy from smaller brands as it allows them to support local entrepreneurs (vs 40% of 38-53 year olds)



**Unilever is proof that huge multinational businesses can build local economies too**

Unilever have committed to donate 50% of the profits from their Growing Roots urban farming initiative



**Patagonia Action Works – networking activists and facilitating local action**

Patagonia copy media headlines onto the platform, next to a button saying 'What Can I Do?'



## WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

### IT IS NOT AFRAID OF BUILDING LOCAL ENTERPRISE & BRANDS

For the benefit of the economies and lives involved in and impacted by its supply chain, successful businesses will become investors and service partners



### IT NUDGES CONSUMERS TOWARDS MORE CONSCIOUS CONSUMPTION

Via setting an example when it comes to transparency, becoming partners with brands with a similar ethos and purpose, and openly supporting public initiatives



### IT AVOIDS WASTE AT ALL COSTS, AND LOVES GIVING IT NEW VALUE

With significant investment into innovating alternative packs, or even products that require fewer materials, and sees opportunity in the waste of others

