

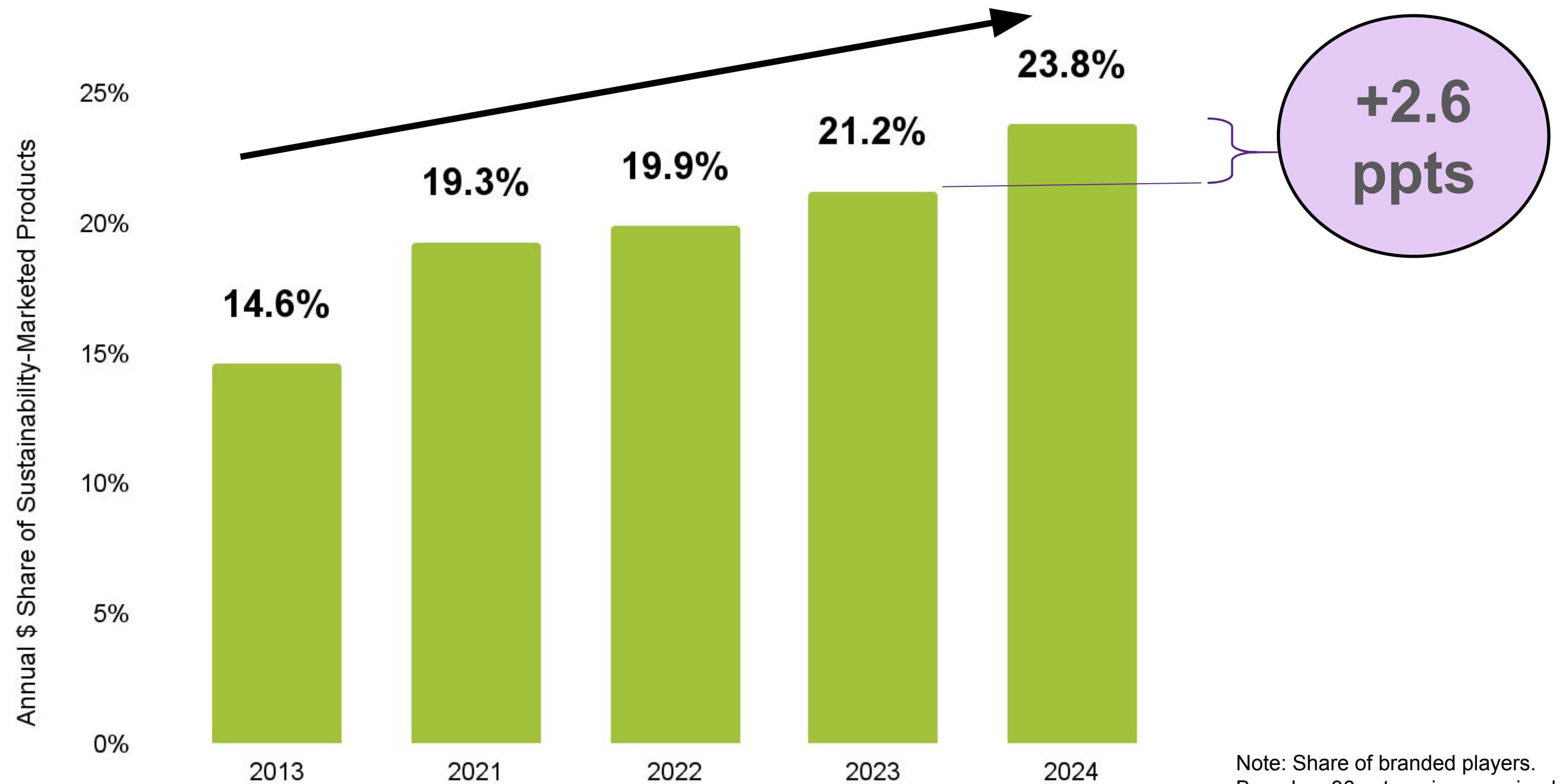
Sustainable Market Share Index™: Research Question 1

Research Question: Have branded products marketed as sustainable delivered growth and how have they performed relative to conventionally marketed products?

Research Result: Products marketed as sustainable have grown every year since 2013, with a significant share increase during the pandemic and recent inflation. Moreover, they are contributing to a disproportionate share of the CPG category growth.

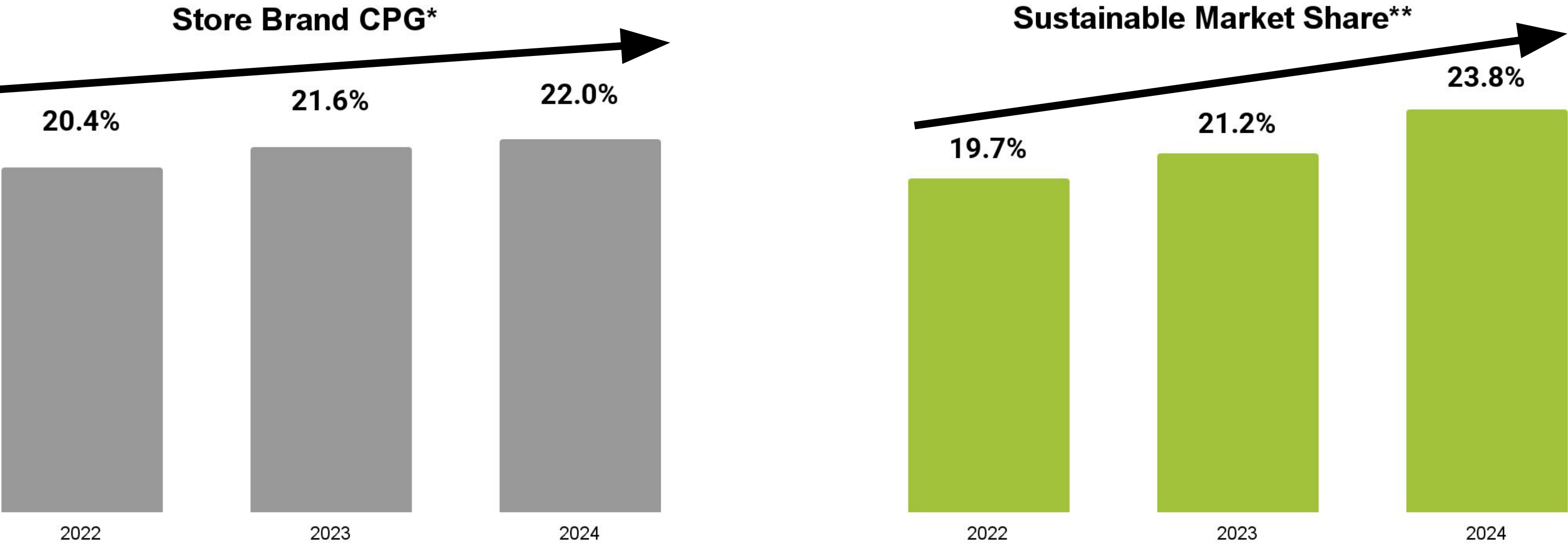
Sustainable Market Share Index™: 2024 Market Share

Products marketed as sustainable continue to **grow share despite high inflation**



Sustainable Market Share Index™: CPG Growth Segments

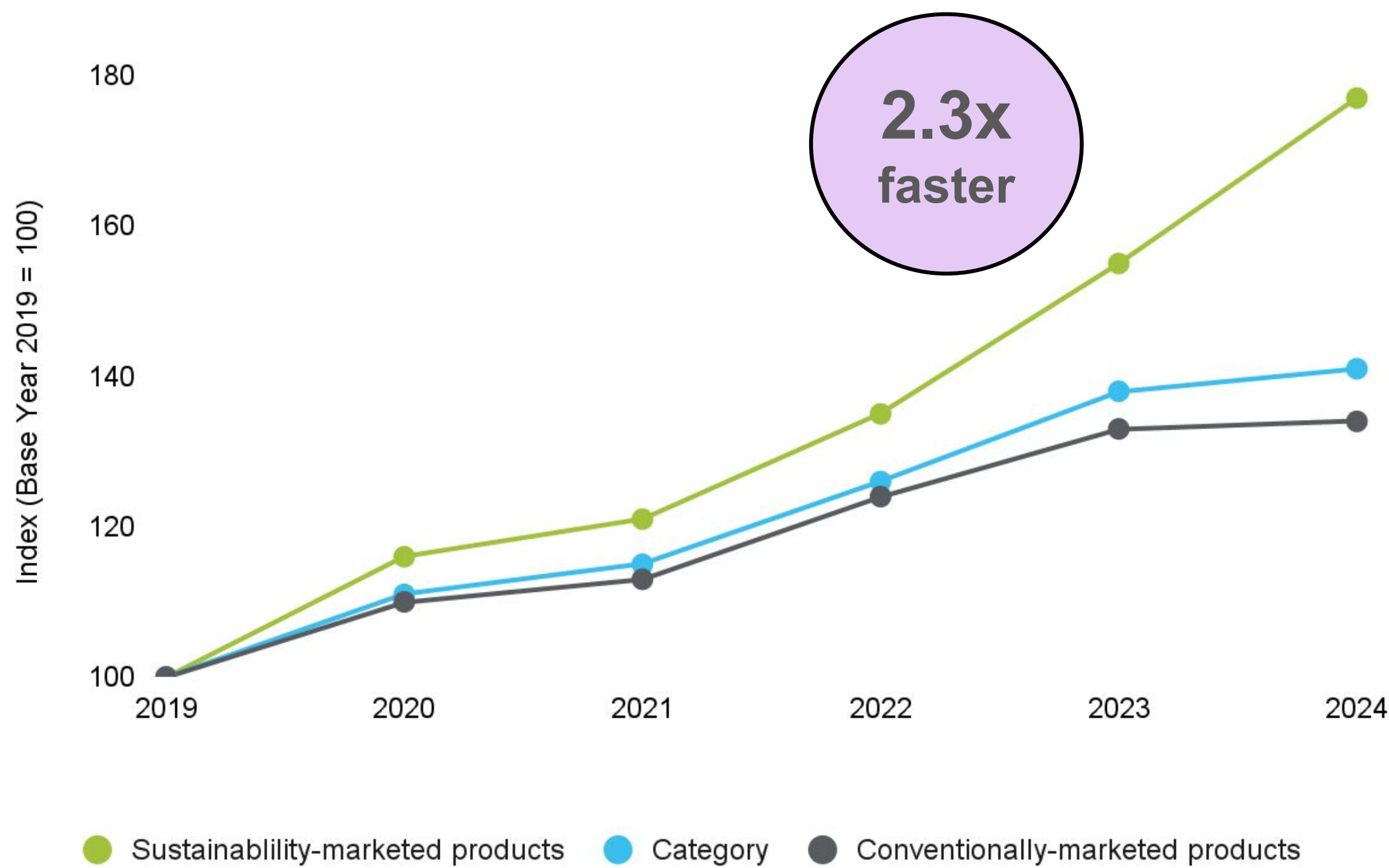
Store brand share of market was 22.0%, up +0.4% from 2023, suggesting branded **sustainable products** are **more insulated** from inflation-driven moves to store brands



* From Circana private label report
**36 categories examined

Sustainable Market Share Index™: Growth Rate 5-YR CAGR

At a **12.4% 5-year CAGR**, sustainability marketed products grew 2.3X faster than conventionally marketed products



Sustainability-marketed
5-yr CAGR:

+12.4%

Total Market
5-yr CAGR:

+6.8%

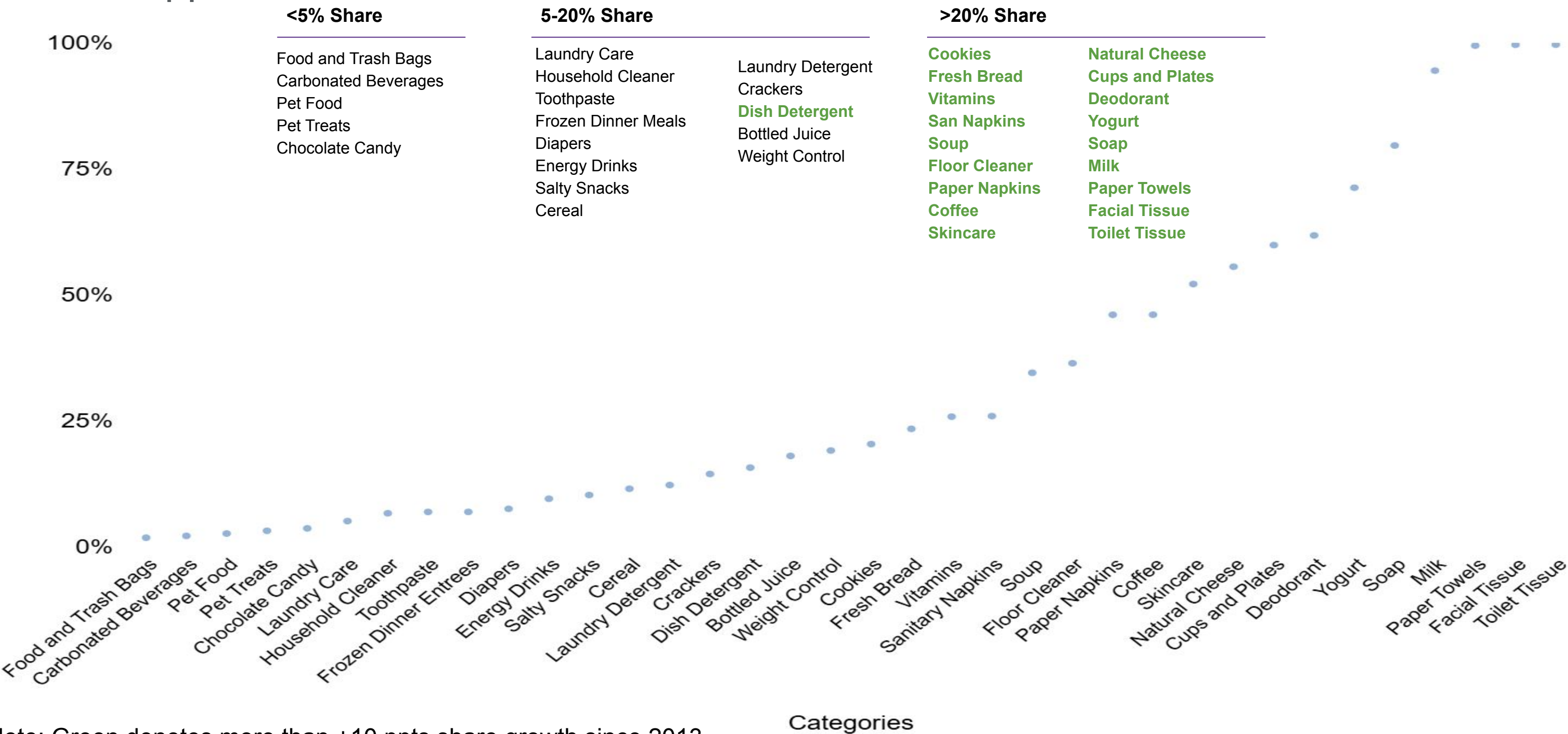
Conventionally marketed
5-yr CAGR:

+5.4%

Note: Share of branded players.
Based on 36 categories examined

Sustainable Market Share Index™ : Category Performance

More than half of categories have seen **10+ ppts growth** in share since 2013, ranging from 10-80+ ppt increases

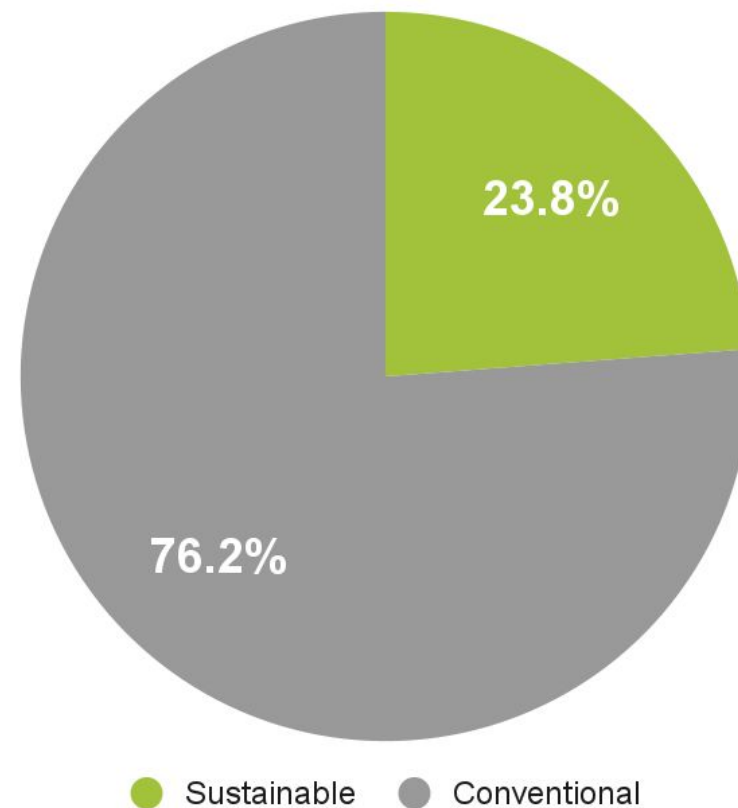


Note: Green denotes more than +10 ppts share growth since 2013

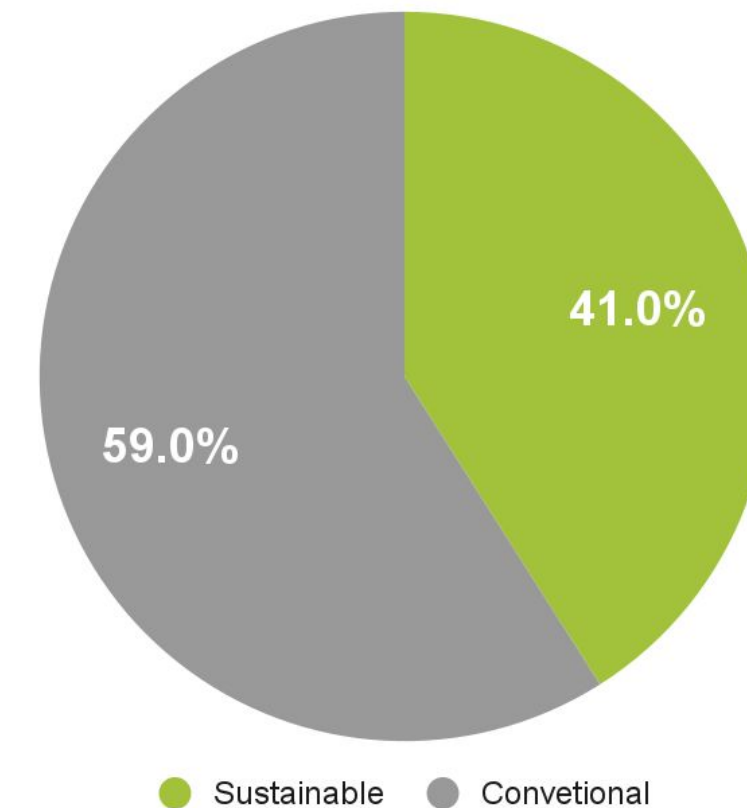
Sustainable Market Share Index™: Contribution to Growth

Despite having share of 23.8% of the market, branded products marketed as sustainable delivered **41% of the CPG market growth (2013-2024)**

\$ Share of Market (2024)



\$ Share of Market Growth (2013-2024)



Note: Share of branded players.
Based on 36 categories examined