## **Sustainable Market Share Index™:** Research Question 1

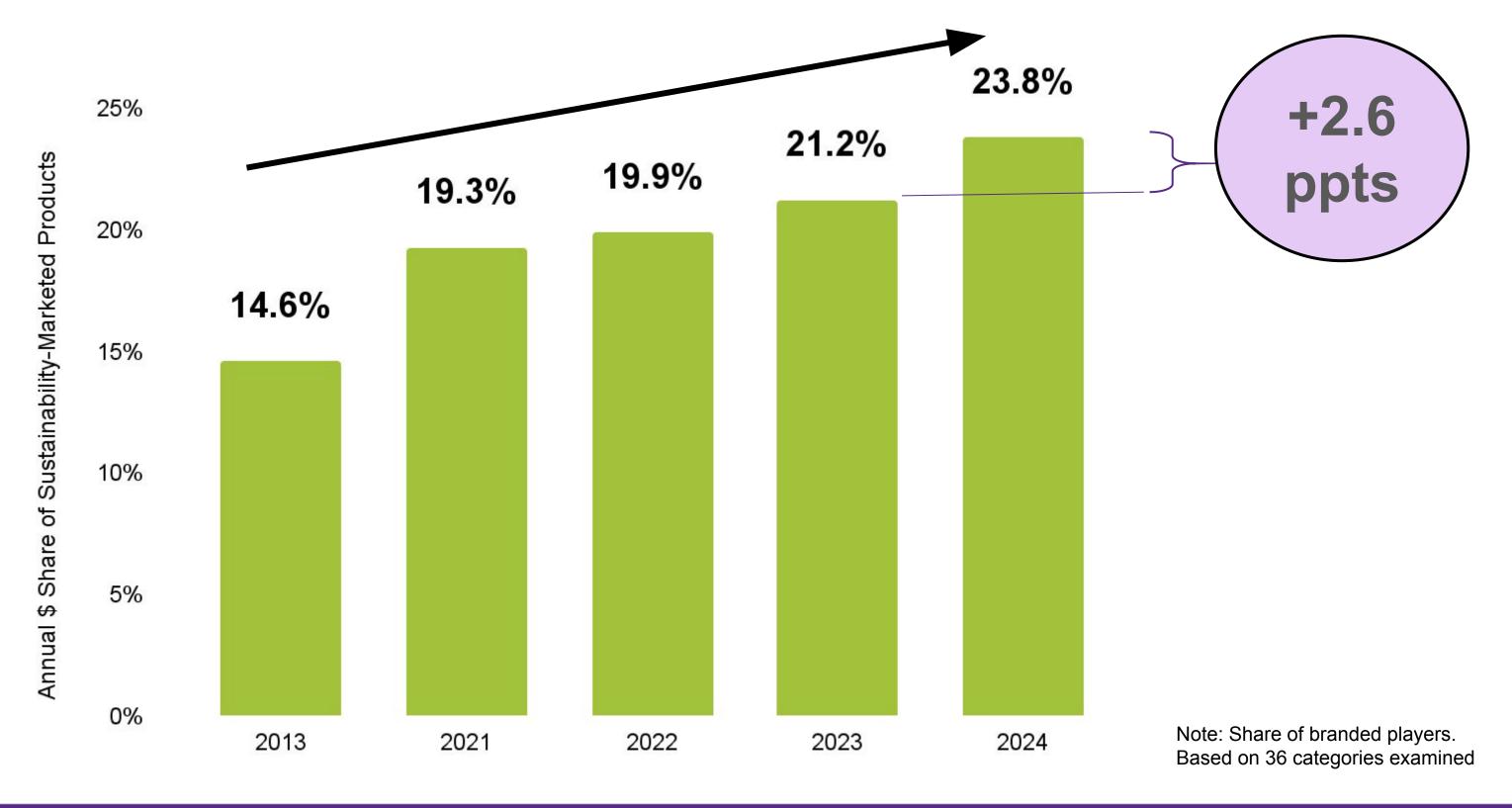
**Research Question:** Have branded products marketed as sustainable delivered growth and how have they performed relative to conventionally marketed products?

**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.



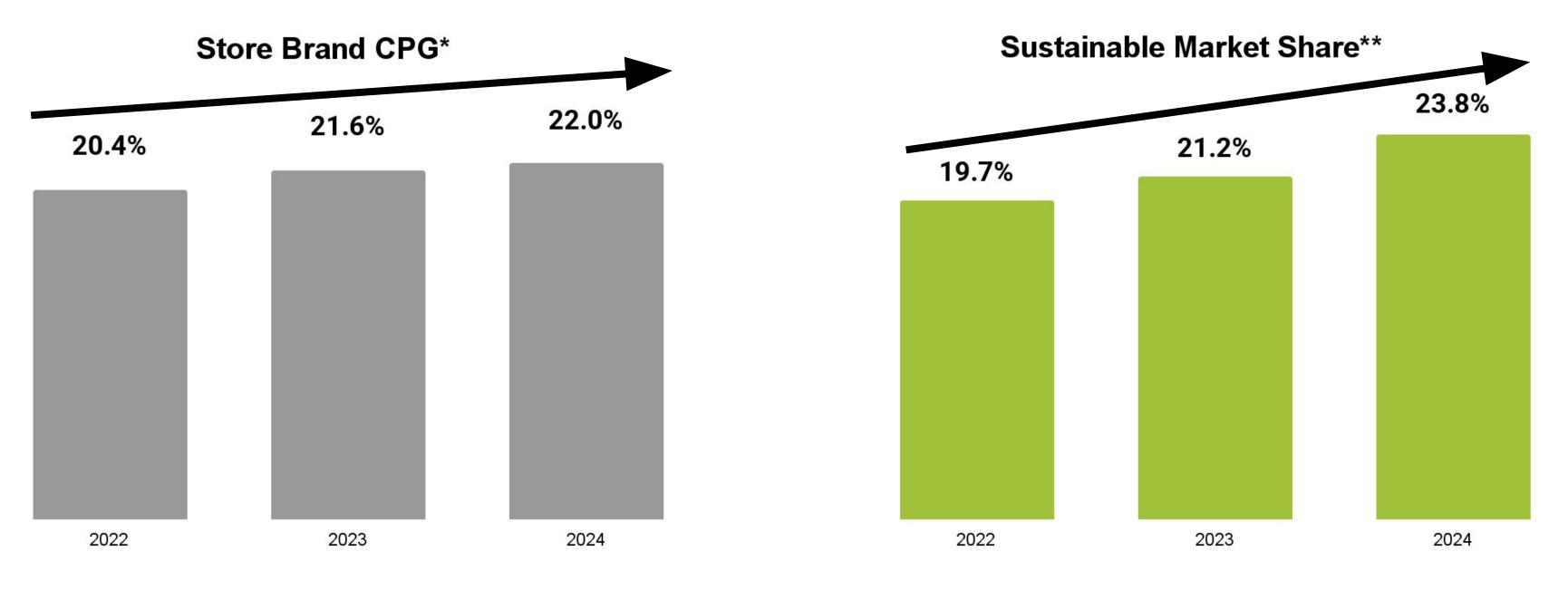
# Sustainable Market Share Index<sup>™</sup>: 2024 Market Share

Products marketed as sustainable continue to grow share despite high inflation



# Sustainable Market Share Index<sup>™</sup>: 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<sup>™</sup>: 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 180 2.3x 5-yr CAGR: +12.4%faster Index (Base Year 2019 = 100) 160 **Total Market** 140 5-yr CAGR: +6.8% 120 Conventionally marketed 5-yr CAGR: 100 +5.4% 2021 2019 2020 2022 2023 2024

Conventionally-marketed products

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

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Sustainablility-marketed products

Category

# **Sustainable Market Share Index**<sup>™</sup>: Category Performance

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

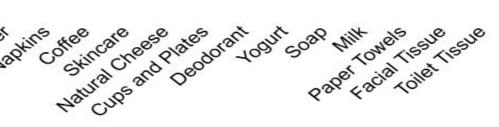
100%	<5% Share	5-20% Share		>20% Share	
	Food and Trash Bags Carbonated Beverages Pet Food Pet Treats Chocolate Candy	Laundry Care Household Cleaner Toothpaste Frozen Dinner Meals Diapers	Laundry Detergent Crackers <b>Dish Detergent</b> Bottled Juice	Cookies Fresh Bread Vitamins San Napkins Soup	Na Cu De Yo So
75%		Energy Drinks Salty Snacks Cereal	Weight Control	Floor Cleaner Paper Napkins Coffee Skincare	Mi Pa Fa To
50%					
					0
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25%			• • • •		0
	Food reals and Care aner asse conduction of the care o	ers inks acks ereal gent kers of a sally shacks of a sally shacks ereal gent crackers of a sally shack of a	ergent juice ontrol kies aotiled juic control cookies aotiled price on cookies the on control of the start	ad mins wins soup and utamins paper	•

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

Categories

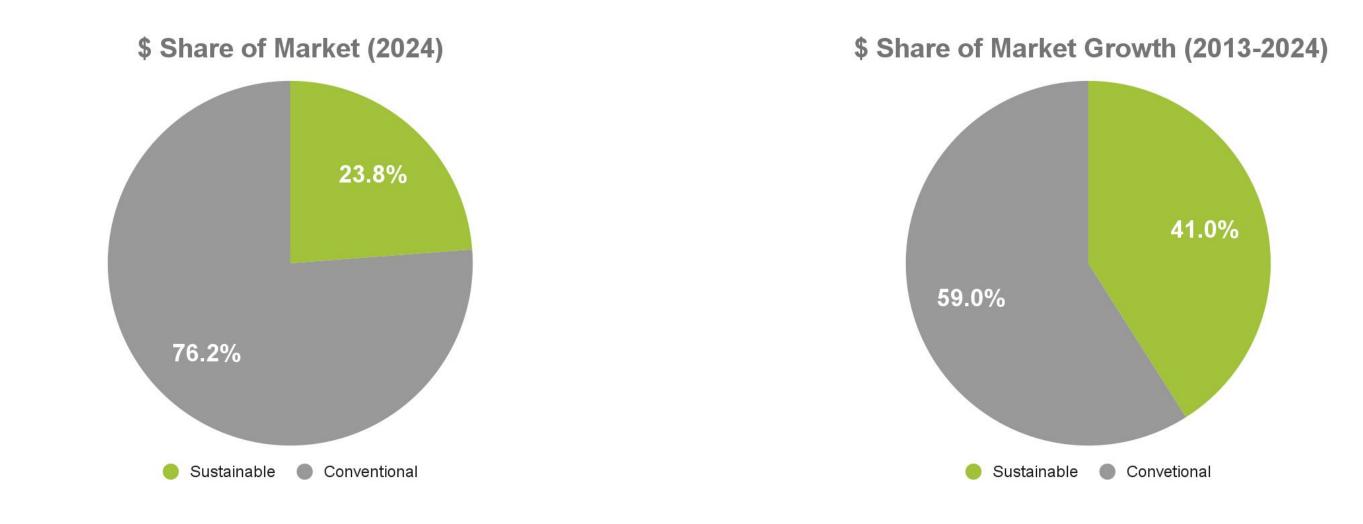
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# **Sustainable Market Share Index**<sup>™</sup>: Contribution to Growth

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



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

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# ribution to Growth ducts marketed as

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