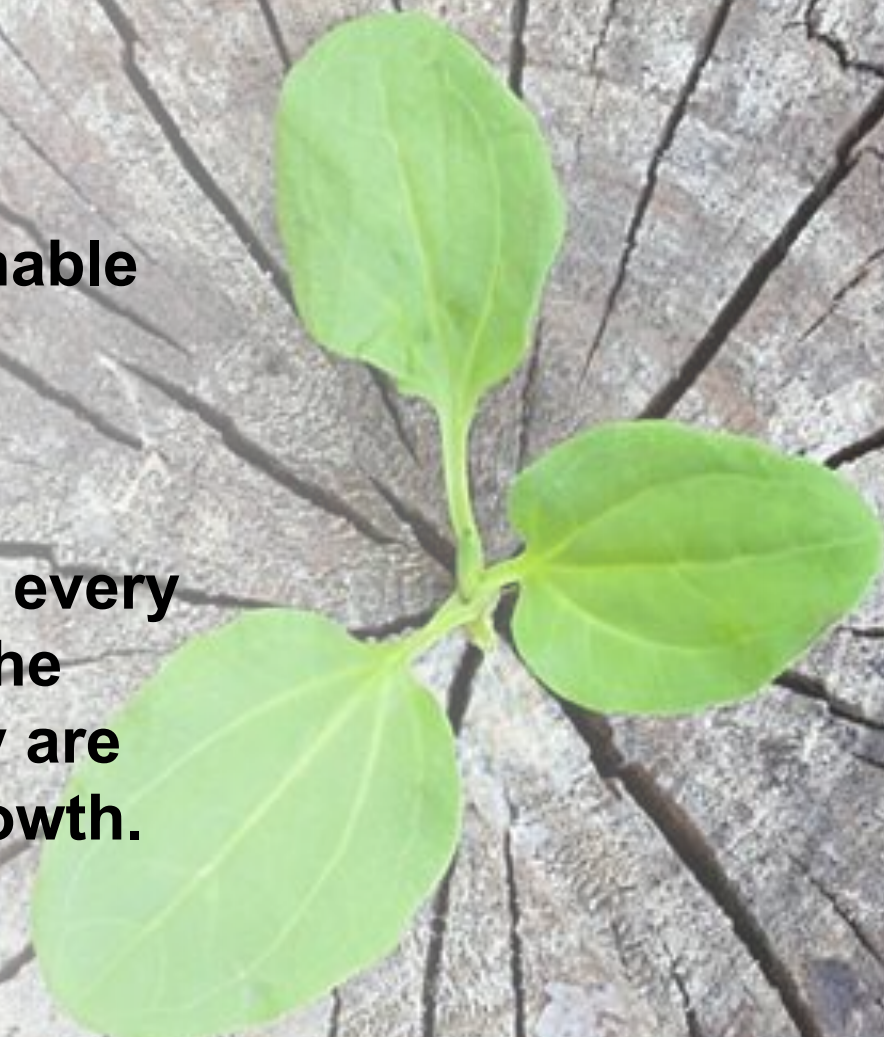


Sustainable Market Share Index™: Research Question 1

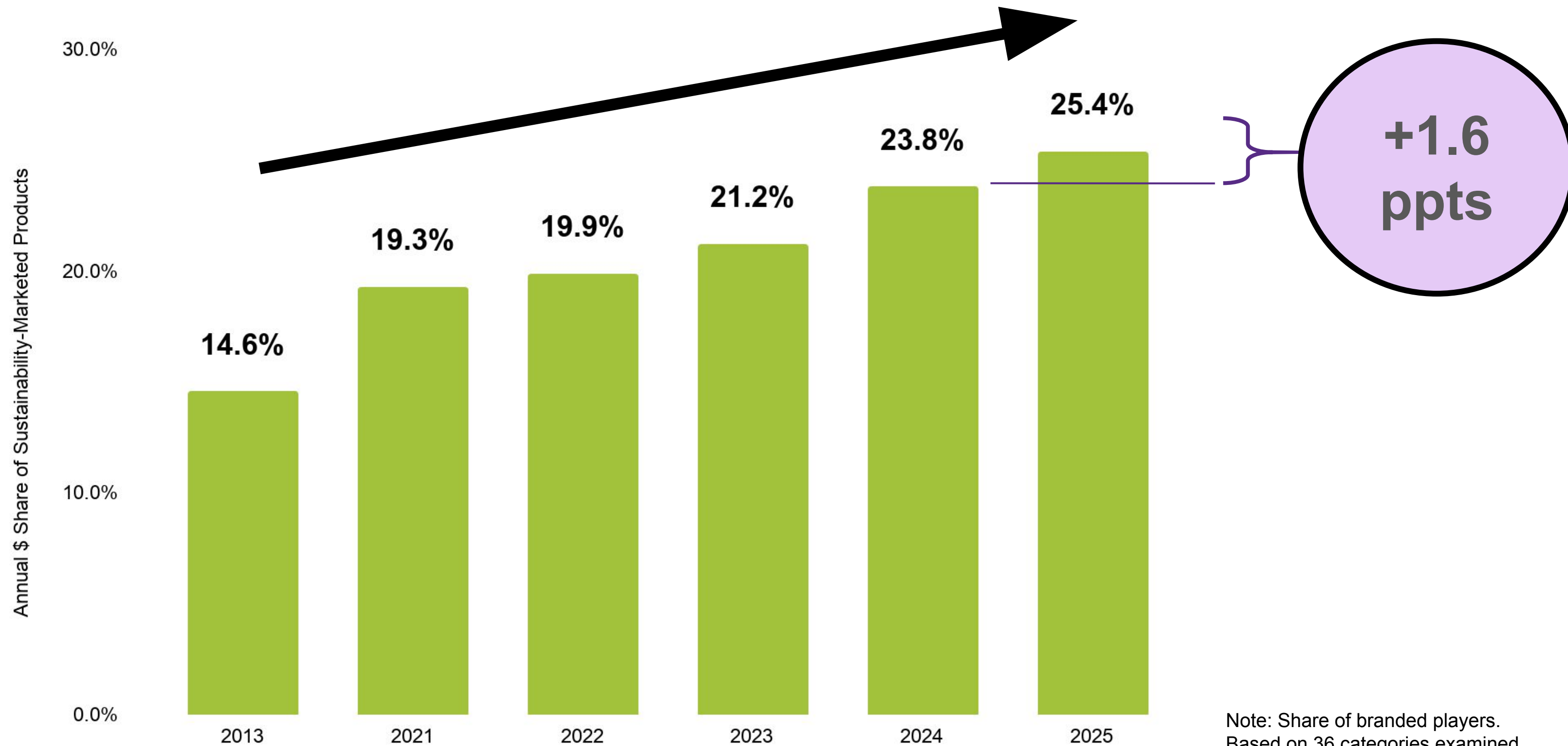
Research Question: Have branded products marketed as sustainable delivered growth and how have they performed relative to conventionally marketed products?

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



Sustainable Market Share Index™: 2025 Market Share

Sustainability-marketed products continue to **grow share despite high inflation and external volatility**

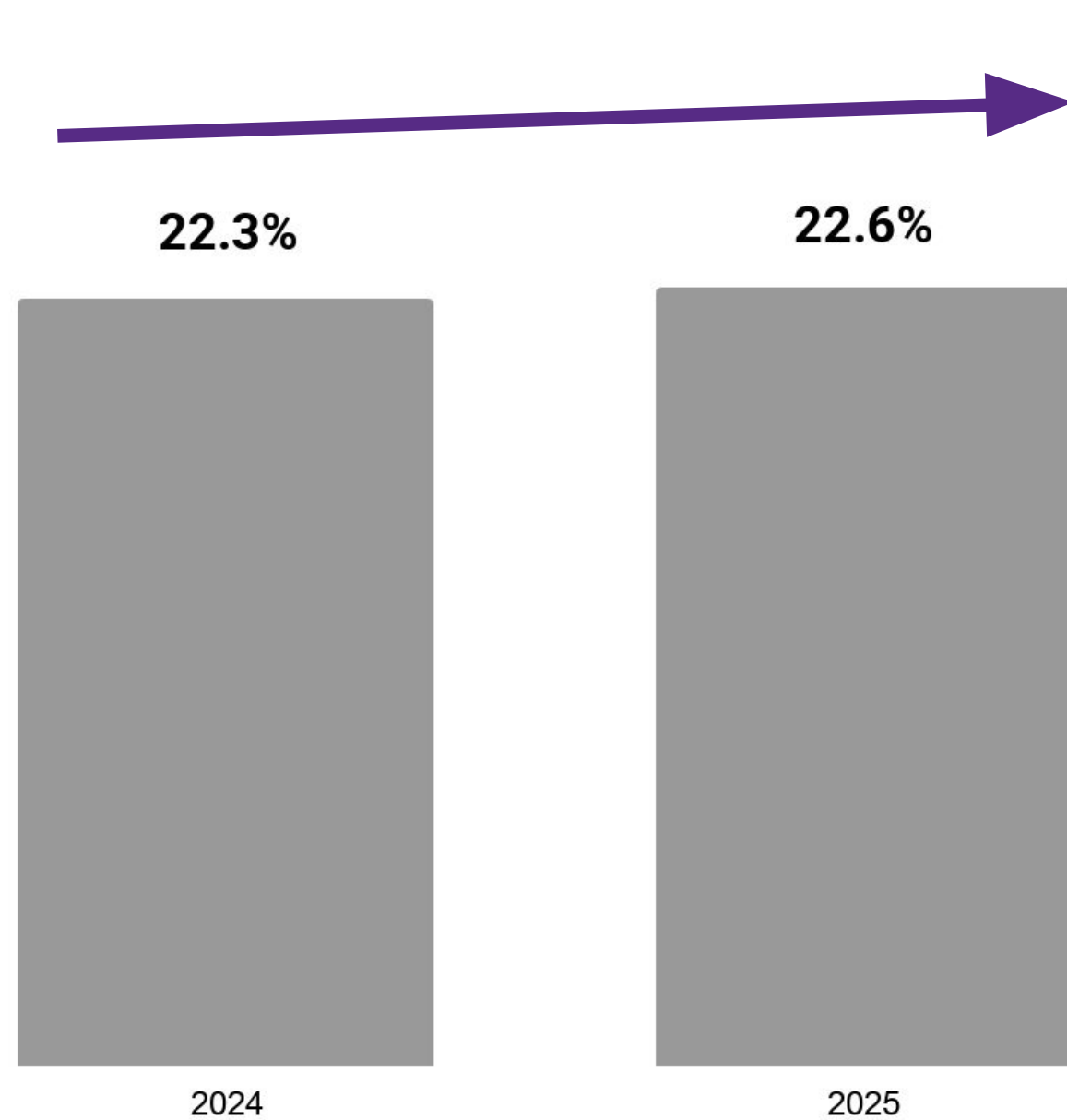


Note: Share of branded players.
Based on 36 categories examined

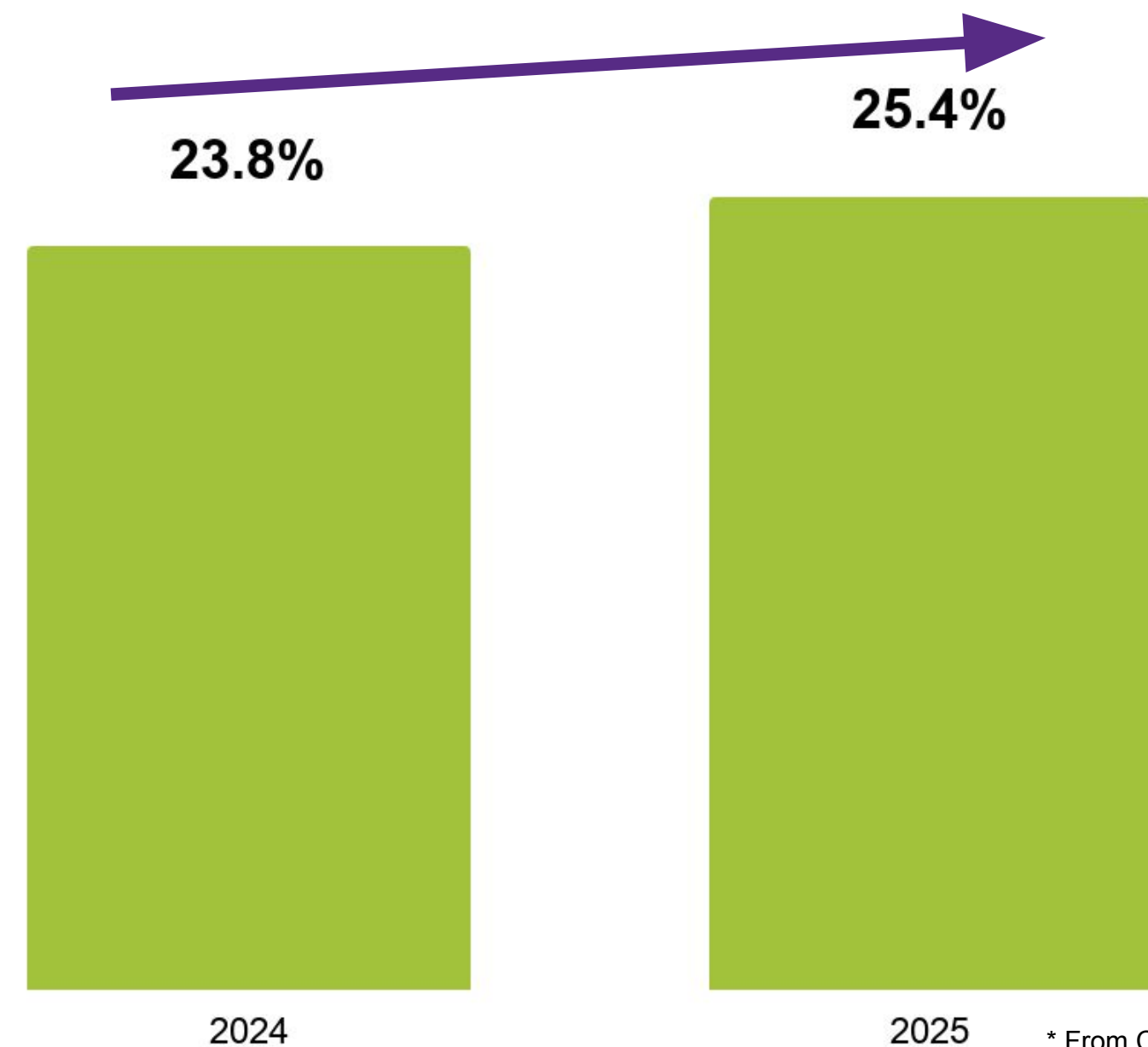
Sustainable Market Share Index™: CPG Growth Segments

Store brand share of market was 22.6%, up +0.3% from 2024, suggesting branded **sustainable products** are **more insulated** from inflation-driven moves to store brands

Store Brand CPG*



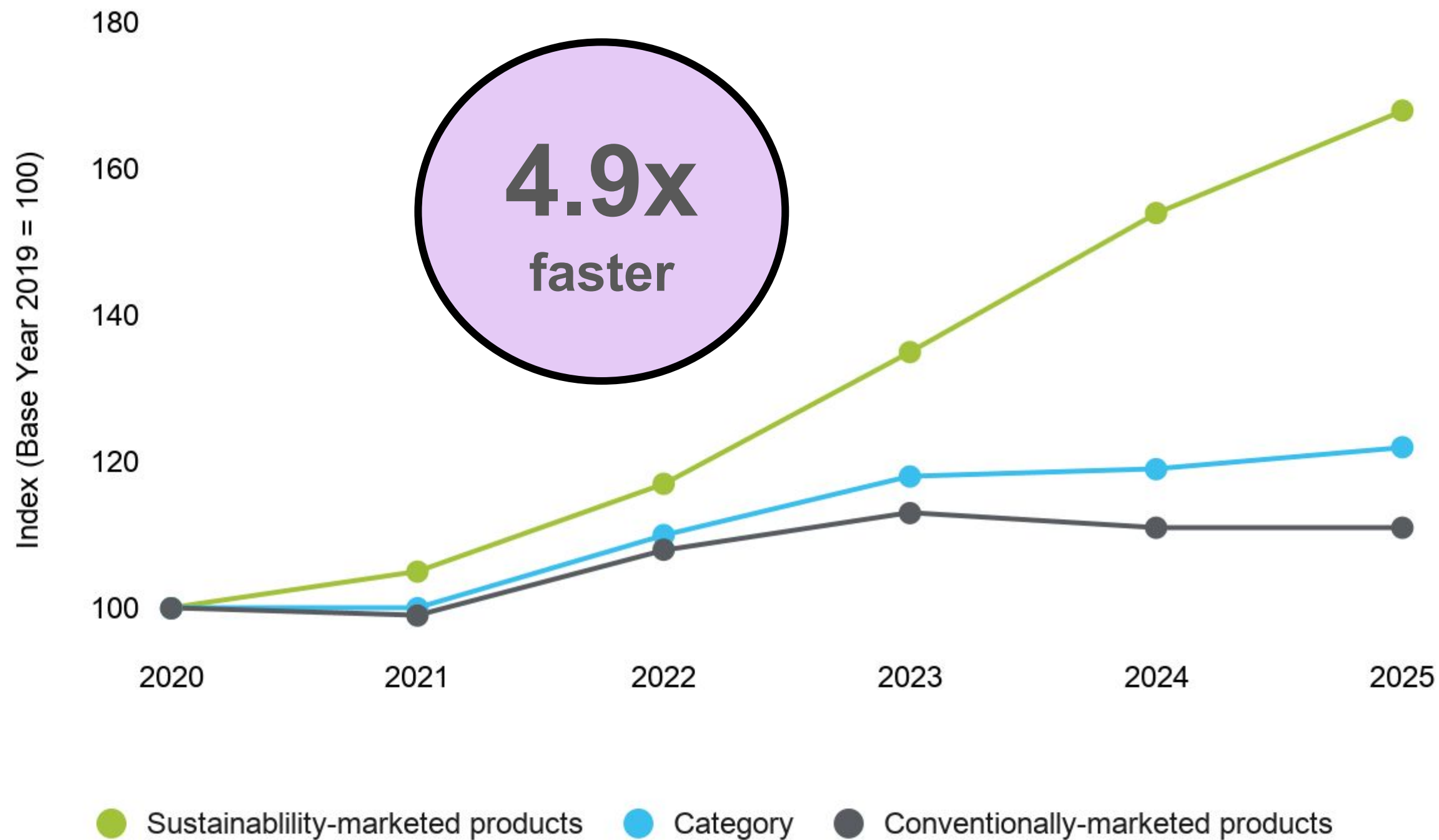
Sustainable Market Share**



* From Circana private label report
**36 categories examined

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

At a **10.9% 5-year CAGR**, sustainability marketed products grew 4.9X faster than conventionally marketed products



**Sustainability-
marketed:**

+10.9%

Total Market:

+4.0%

**Conventionally-
marketed:**

+2.2%

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

Sustainable Market Share Index™ : Category Performance

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

<5% Share

5% - 20% Share

>20% Share

Pet Food
Carbonated Beverages
Chocolate Candy
Cookies
Pet Treats
Food and Trash Bags

Laundry Care
Household Cleaner
Frozen Dinner Meals
Energy Drinks
Diapers
Toothpaste

Salty Snacks
Cereal
Crackers
Dish Detergent
Bottled Juice
Weight Control

Fresh Bread
Vitamins
Soup
Floor Cleaner
Coffee
Paper Napkins
San Napkins
Laundry Detergent
Natural Cheese

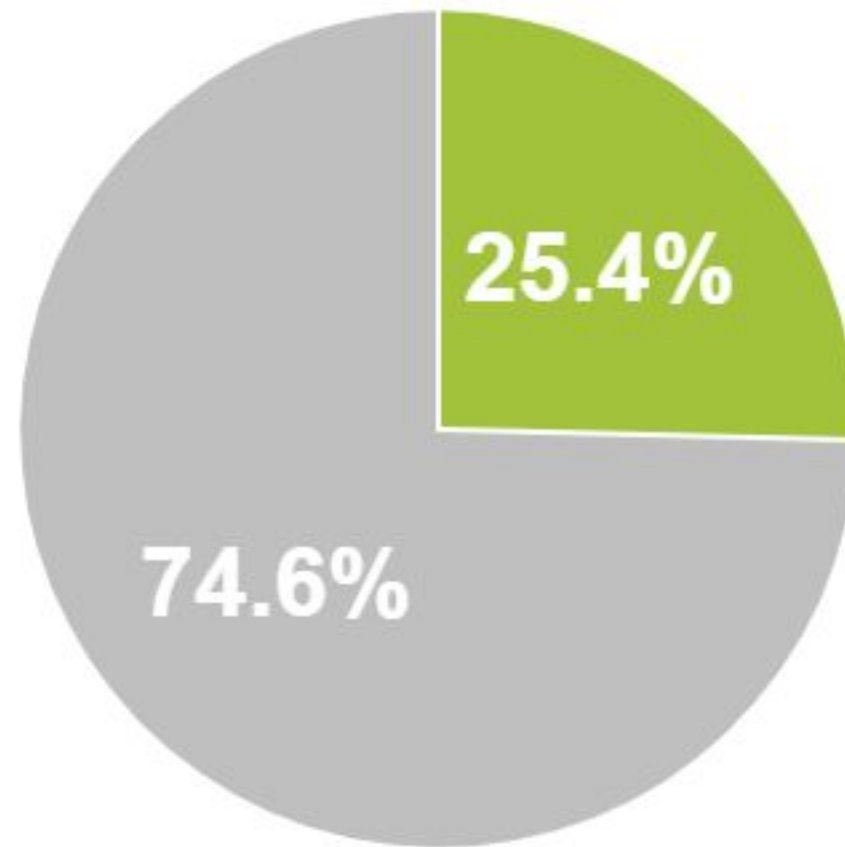
Skincare
Cups and Plates
Deodorant
Yogurt
Soap
Milk
Paper Towels
Toilet Tissue
Facial Tissue

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

Sustainable Market Share Index™: Contribution to Growth

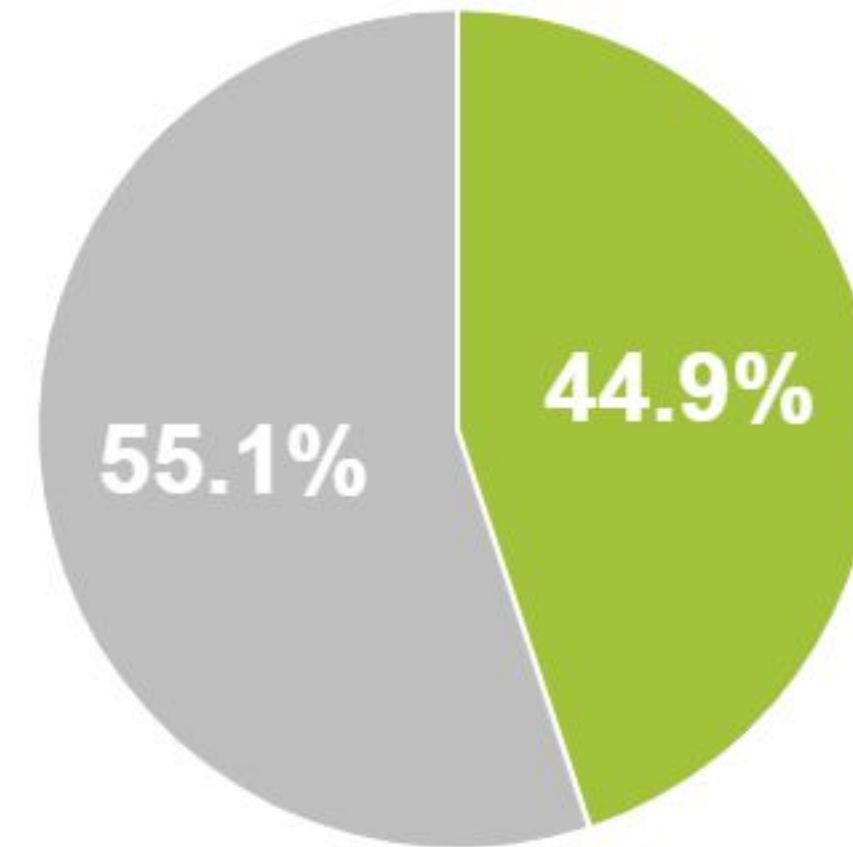
Despite having share of 25.4% of the market, branded products marketed as sustainable delivered **44.9% of the CPG market growth (2013-2025)**

\$ Share of Market (2025)



- Sustainability-marketed products
- Conventionally-marketed products

\$ Share of Market Growth (2013 - 2025)



- Sustainability-marketed products
- Conventionally-marketed products

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