

CSB Sustainable Market Share Index: Research Question 1

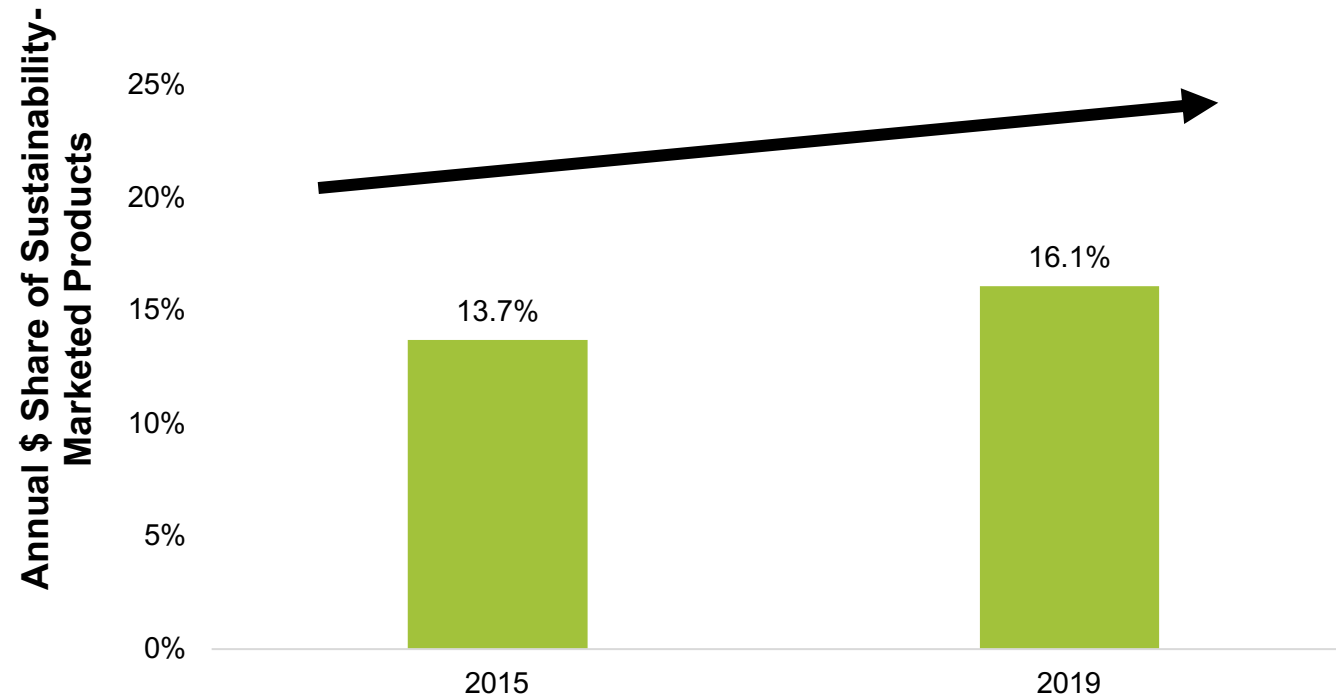
Research Question 1: Have purchases of sustainable products increased over time?

Research Result: Not only are sustainability-marketed products growing but they also are contributing to a disproportionate share of the CPG category growth.



Sustainable Market Share Index™: Sustainable Market Share

Across all categories studied, sustainability-marketed products account for 16.1%* share of market (\$) in 2019, up from 13.7%* in 2015.



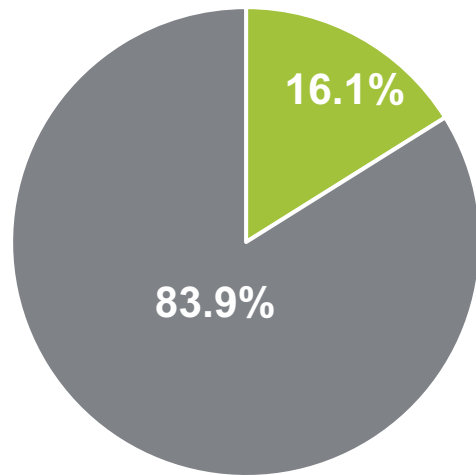
* Shares updated due to CSB & IRI re-categorizations; based on 36 categories examined



Sustainable Market Share Index™: Contribution to Growth

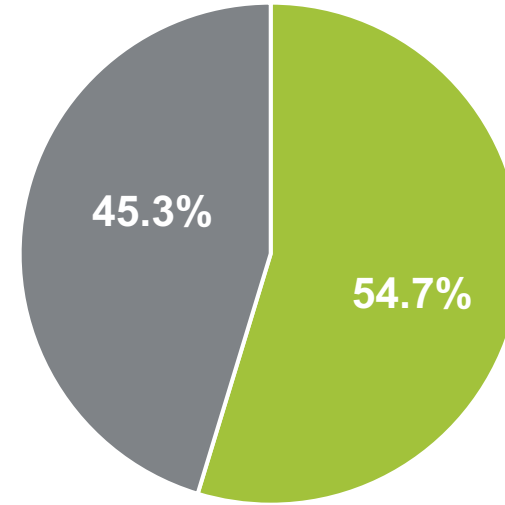
Despite the fact that sustainability-marketed products are 16.1%* of the market, they delivered 54.7% of the CPG market growth (2015-2019).

\$ Share of Market
(2019)



- Sustainability-marketed products
- Conventionally-marketed products

\$ Share of Market Growth (2015-2019)

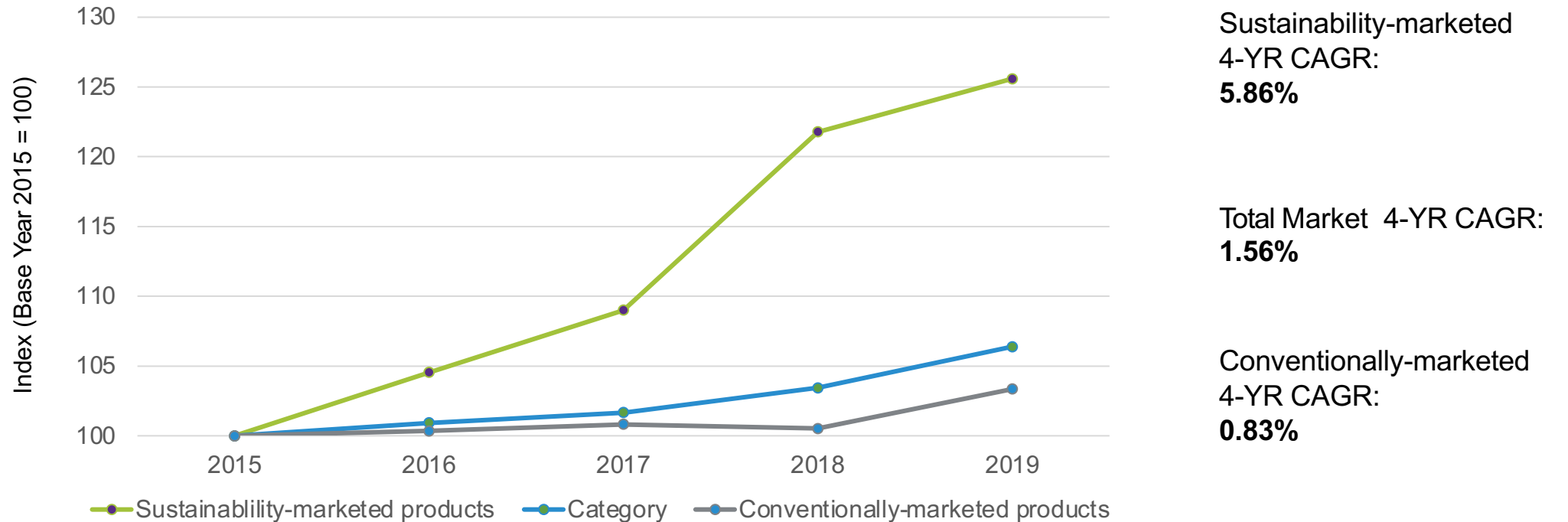


- Sustainability-marketed products
- Conventionally-marketed products

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Sustainable Market Share Index™: Growth Rate

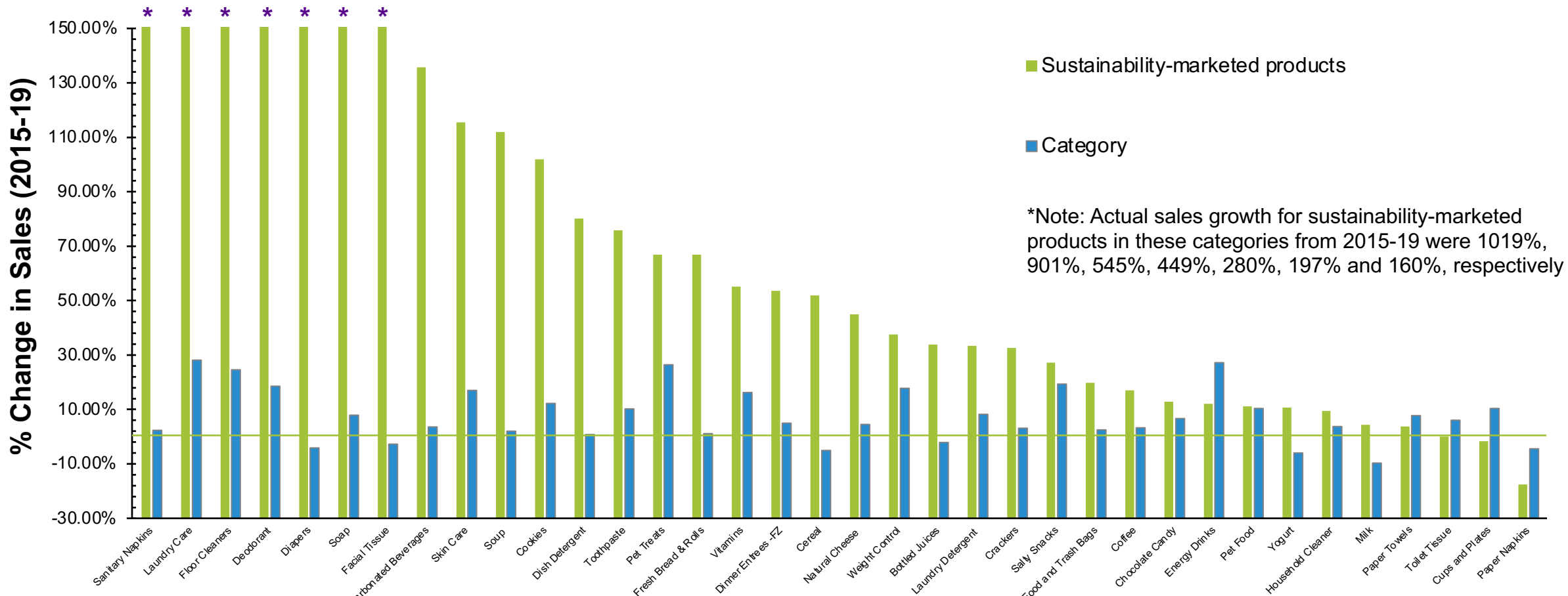
Sustainability-marketed products grew 7.1x faster than conventionally-marketed products, and 3.8x faster than the CPG market.



Note: Based on 36 categories examined

Sustainable Market Share Index™: Category Performance

In ~90% of individual product categories, the growth of sustainability-marketed products outpaced the growth of their respective categories.



* Paper towels, cups and plates, toilet tissue and paper napkins lost share to private label. Because we did not have visibility into private label to ascertain if there were claims regarding sustainability, we had to assume they were not marketed as sustainable. So, in fact, if private labels were making claims of sustainability (as we have observed they do on shelf), these categories may not have seen share decline of sustainability-marketed products.