



SUSTAINABILITY: *The Planet Health – Personal Health Connection*

2022 Global Topic Report – Detailed Outline

We are seeing a paradigm shift among consumers toward a new holistic view on sustainability—morphing from a parallel of healthy nutrition to a fully integrated component of a product’s healthfulness. In fact, we see sustainability becoming more of a requirement for determining if a product can be considered “healthy” in the mind of the consumer.

This 2022 report from HealthFocus International takes a deeper look at the topic of the environment and sustainability—globally, regionally, and across 23 individual countries—to help companies better understand shopper concerns and attitudes, and allow them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil and Mexico
- EUROPE: France, Germany, UK, and Russia
- MIDDLE EAST & AFRICA: Saudi Arabia, Turkey, and Nigeria
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, Thailand, South Korea, Malaysia, Taiwan, and Vietnam

TOPICS COVERED:

- **Planet + Personal Health Connection**
 - Do they believe that for a food/beverage to be healthy, it must be healthy for both themselves and the environment?
 - What impact does a healthy environment (e.g., better air quality, no pollution, etc.) have on their overall health?
- **Consumer Attitudes & Action Towards Sustainability**

- How important is sustainability/environmental impact when making food/beverage choices? How does this compare to other attributes?
 - Has sustainability become more important in their dietary choices over the last year?
 - How do consumers differ in their attitudes around food and beverage choices and the environment?
 - Are environmental issues impacting selection of food products?
 - Do consumers want to know where their foods and beverages were grown or produced?
 - Are they interested in buying from companies that support social, community, or environmental interests?
 - Brand influence:
 - Low environmental impact (e.g., carbon footprint)
 - Environmentally friendly packaging
 - Brand supports regenerative agriculture/soil health
 - Transparency (e.g., how the product is made, ingredient sources, etc.)
 - Produced by a climate friendly company
 - Reduces food waste (e.g., made with upcycled ingredients like vegetable stems turned into chips)
- **Environmental Concerns**
- How concerned are consumers about the environmental impact of how their food is grown, processed, and delivered?
 - What are the top environmental concerns among consumers and how do they vary around the world and among key demographics?
 - Food waste
 - Plastic waste
 - Climate change
 - Pollution (e.g., air, water, land)
 - The treatment of animals in the food supply
 - Modern farming practices (e.g., factory farming, chemical fertilizers, treatment of farmers, etc.)
 - Food shortages
 - Water shortages
 - Overly engineered foods
 - Biodiversity and land health (e.g., soil health, monocropping, habitat destruction/deforestation, etc.)
 - Chemicals/Toxins/Heavy metals in the food supply
- **Future Outlook**
- The COVID-19 impact: Has COVID-19 made consumers more concerned for the environment and sustainability of the world around them?
 - Are consumers more willing to accept food science innovation if it makes a product more sustainable/environmentally friendly?
 - How interested are consumers in more sustainable options, like:

- Lab-grown animal products from cellular agriculture (e.g., growing meat, dairy, and eggs from animal cells)
 - Lab-grown plant products from cellular agriculture (e.g., growing products like coffee that are becoming unsustainable)
 - Low/Zero waste food and beverage products
 - Non-traditional farming practices (e.g., urban farming, vertical farming, hydroponic, etc.)
- **Target Profile: *The New Sustainability Shopper***
 - Explores a segment of shoppers (who prioritize sustainability in their food and beverage choices and believe that for foods and beverages to be healthy they need to be healthy for both themselves and the environment) to better understand their unique attitudes and needs. The group is profiled globally and sized within each region and country. This section will highlight many opportunities, including:
 - Ingredient interest
 - Value drivers: Where will they pay more?
 - What they look for on food and beverage labels
 - What their diet looks like
 - And much more!