



THE CONVERGENCE OF HEALTH & ENVIRONMENT

THOUGHTS FROM ADOLFO



Welcome to the 12th issue of the Tetra Pak Index, which focuses on health and the environment. Historically seen as two separate areas, we're now seeing them converge within food and beverage, which is perhaps the first industry to see this trend. This report explores the drivers of this new trend, and the opportunities it presents for brands going forward.

Environment and health, the top two consumers concerns are now seeing an increasing overlap, with a direct correlation perceived between the two. Nearly three out of five consumers already think that their health and well-being are strongly affected by the environment.

Our research¹ shows that consumers believe they carry the responsibility for both their own health and the health of the planet. There is a growing belief that today's lifestyles, particularly what we eat and drink, have a fundamental impact on both.

There is a widespread desire among consumers to live healthier, more environmentally friendly lives. Changing food and drink habits is seen as vital to this – it's tangible, achievable and can be personally controlled. However, the barriers to change remain, such as cost, lack

of knowledge, lack of availability, and lack of credibility of options. This provides an opportunity for brands that can support consumers in their desire for change and help them overcome such barriers.

There is also a strong potential for brands to demonstrate purpose, and bring about environmental innovations in packaging, as consumers increasingly see its value and are prepared to pay more for it.

Founded on the idea that a package should save more than it costs, sustainability has always been core to how Tetra Pak operates as a business. We recently launched our Planet Positive campaign, which urges industry stakeholders to move to a low-carbon circular economy. This represents a new way of thinking, urging industry stakeholders to come together to address the pressing global environmental issues of climate and waste, taking a broader view of sustainability, going beyond recycling and reuse to include the carbon impact of raw materials and manufacturing.

To support brands in their sustainability journey, through our global research study with Ipsos, we have analysed the different levels of

awareness, attitudes and engagement around both health and the environment, to reveal an important new segmentation of consumers.

Based on this, consumers can be divided into six types: Active Ambassadors, Planet Friends, Health Conscious, Followers, Sceptics and Laggards. Each group has their own distinct beliefs, values, change drivers and trusted information sources, creating clear opportunities for targeted products, messaging and more.

We explore these segments in detail in this report, including an index that outlines what each segment plans to change in the next 12 months. And we look forward to working with our customers to capture the opportunities these learnings present, both now and in the future.

ADOLFO ORIVE
PRESIDENT & CEO, TETRA PAK GROUP

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**OVERVIEW:
A CHANGING
WORLD**



01
ENVIRONMENT IS THE #1 GLOBAL CONCERN – AND URGENCY IS GROWING

“In my own town, the river is devastated and we are suffering a lot from the lack of water.”

— FEMALE, 37, BRAZIL

“Back then, we knew the rainy season was September to December, but now it’s unpredictable. We also have to use AC at home because it’s so hot now.”

— FEMALE, 38, INDONESIA

In a time of marked uncertainty and turbulence, it’s striking that environmental issues top the (long) list of global concerns by some margin at 63%. Moreover, most consumers think the situation is only going to get worse, with 86% believing that the focus on environmental issues will grow in the coming five years.¹ Indeed, two-thirds believe that we are heading for environmental disaster unless we change our daily habits quickly.

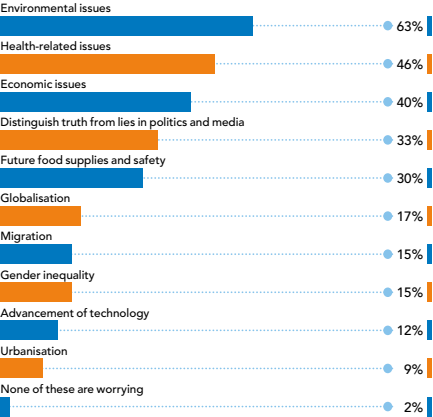
While specific environmental issues vary slightly between countries, global warming is the most worrying issue overall. It leads in every country surveyed bar China and Saudi Arabia, which are more concerned about air pollution (with global warming the #2 worry for both). The concern about climate change is relatively consistent, though local evidence/effects of global warming may be very different. What separates the countries is the level of action being taken to lessen the negative impact, both on a personal level, and on an industrial and governmental level (see market snapshots, page 26).

In our qualitative interviews with the most environmentally aware consumers, respondents everywhere express concern about the planet’s worsening health, even in markets where there was previously limited interest. Such issues have mostly come to their attention via media, especially social media, although, again, many respondents cite examples of climate change directly affecting their own lives.

There is also a strong awareness of growing global waste challenges, notably the impact of plastic on the oceans and sealife. Respondents in Brazil, Saudi Arabia and Indonesia in particular cite the local negative environmental effects of rapid development and industrialisation.

Generally, interest in the environment is shifting rapidly from a distant, abstract concern to one that is much more concrete, urgent and, crucially, personal, as consumers increasingly see this as an issue that will impact on their own and their family’s health.

MOST WORRYING GLOBAL CONCERNS



2 IN 3 CONSUMERS BELIEVE WE’RE HEADING FOR ENVIRONMENTAL DISASTER UNLESS WE CHANGE OUR DAILY HABITS QUICKLY

CASE STUDY
WOODLANDS DAIRY (SOUTH AFRICA)

Major milk producer Woodlands Dairy both co-packs leading national retail brands, and has its own brand, First Choice.

Family-owned and with a passion for the environment, Woodlands recently launched a sustainability campaign called “It’s All Good”, built on three pillars: Promise (quality and business integrity); Planet (conservation); and People (all people are important).

In June 2019, it launched Africa’s first Tetra Brik® Aseptic 1000ml Slim with Bio-based Helicap™ 23 for its First Choice milk. The package has more than 80% renewable materials – including a closure and plastic film derived partly from sugar cane, as well as FSC™ paperboard – and is also recyclable.

Sold through both modern and traditional trade, the new pack

was launched with marketing in-store and across social media platforms with the tagline #GoodStartsSmall. Messaging has focused on sustainability, packaging with increased renewable content and recycling, supported by influencer conversations on social media. The package design includes a QR code, which consumers can scan with a smartphone to learn more about sustainability.



THE SOCIAL MEDIA CONVERSATION

Growing interest in the environment can be seen online, with the conversation about sustainability generating close to 13.8 million mentions in social and online news media during 2018, a steep increase from the previous year (+4.5 million), according to Tetra Pak research.²

Twitter and Instagram were the platforms for 77% of the conversation, equally divided between the channels. Twitter accounted for most of the discussion and shares of studies, whereas Instagram was

the main forum for awareness and advice on sustainable products.

34% of the conversation focused on sustainable development, closely followed by 31% on sustainable living. Sustainable investments and CSR were the most common topics in connection with sustainable development, whereas behaviours, such as organic food consumption and recycling, were frequently highlighted in conversations about daily life.

02
ENVIRONMENT & HEALTH ARE CONVERGING

“Two of my children have health issues, some rare allergies and autism. I think the way our food is manufactured now, and the way animals are fed and raised, creates a great toxic burden and decreases nutrition.”

— FEMALE, 33, USA



3 IN 5 BELIEVE THAT THEIR HEALTH AND WELL-BEING ARE ALREADY AFFECTED BY ENVIRONMENTAL PROBLEMS

After the environment, health is the biggest global concern for consumers (at 46%). These two most pressing worries have historically been treated as separate areas. But as environmental issues become more evident in daily life, consumer concerns about the direct impact on health are growing.

In fact, 59% of all consumers already think that their health and well-being are strongly affected by environmental problems. And when we look at the most worrying environmental and health concerns, we see the same factors rating highly on both: air and ocean pollution, microplastics and poor drinking water (see chart).

Consumers also see a correlation between health and the environment in the products they buy. Nearly half (47%) think that the purchase choices they make for their health will have an impact on the environment. And some see a link the other way too: 37% of consumers who plan to buy more environmentally sound products say that it will have a positive impact on their physical health, and 18% believe that it will also improve their mental health (see page 07).

The more concerned about the environment consumers become, the more health-conscious

they become. For those most concerned about the environment, a full two-thirds think that their health and well-being are strongly affected by environmental issues (7% above the average).

This group also has a stronger belief that physical and mental health are major concerns for society,¹ and they are substantially more likely to be willing to sacrifice convenience and to pay more for healthy products.² Moreover, in our interviews, many also report personal experiences of health issues being caused by environmental issues and/or modern lifestyles.

While the intersection of personal and planet health is on the rise globally, the level of maturity varies between countries (see page 26). However, as our Cultural Insight Network reports show,³ a driving factor for positive change almost everywhere is youth.

Young people want and expect to be healthier and live longer than their parents. Moreover, their use of social media, their own experience of climate change and the global visibility of young activists all urge them to act more responsibly towards the environment.

CONSUMER CONCERNS RELATED TO FOOD & BEVERAGE

In our consumer interviews,⁴ behaviours and habits related to food – sourcing, production, preparation and packaging, and consumption – are often cited as having a negative impact on both the environment and health. Cited examples of health

problems include children’s allergies, ADD and obesity, which some believe to be caused by environmental factors such as genetically modified foods and pesticides, excess sugar, artificial additives and so on.

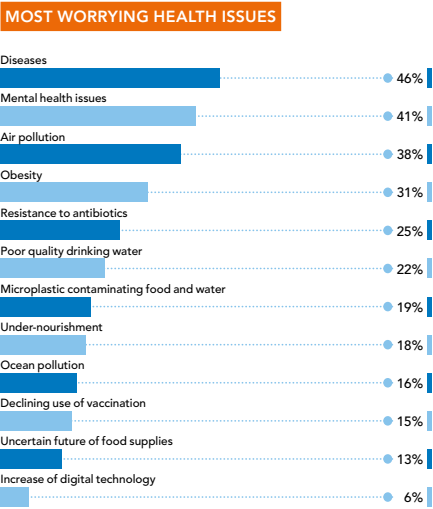
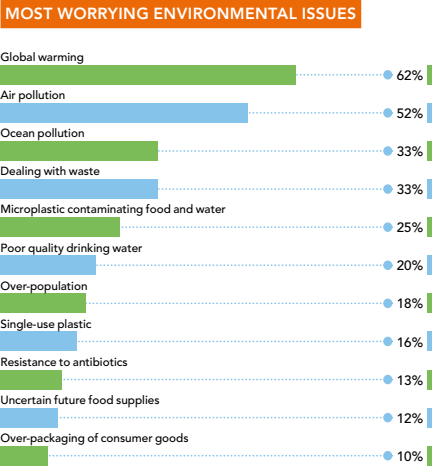
Health is mainly what changes consumption habits, driving consumers to choose products that are organic, locally produced and

less processed, with less sugar and shorter ingredient lists.

In the USA and UK particularly, some consumers see meat and dairy as having a negative impact on the environment, and their consumption has therefore decreased, with soy most frequently cited as the substitute (although children largely still drink dairy). Very few mention oats as

being better for the environment than soy, suggesting that the relative environmental impact of plant-based milks is not widely understood.

However, substituting dairy seems to be a luxury for Western adults. It is not seen as a concern for Brazilian, Indonesian and Saudi consumers, for example, where dairy is regarded as more of a necessity for a healthy diet.



03

INDIVIDUAL RESPONSIBILITY IS RISING: CONSUMERS WANT TO CHANGE AND "DO THE RIGHT THING"



4 IN 5 CONSIDER THE ENVIRONMENT WHEN MAKING PURCHASING DECISIONS

MENTAL & PHYSICAL WELL-BEING

Once considered something of a taboo topic, mental health is now considered equal to physical health: 67% of consumers globally agree that it is a major concern for society – the same figure as for physical health. (The figure for “strongly agree” is actually higher: 37% versus 35%.) Looking at specific health problems, stress is considered the most concerning from a

personal perspective (at 36%), significantly ahead of heart health (29%), with depression/anxiety only just behind (on 28%) – all ahead of cancer, the traditional fear, on 24%. A desire “to feel better about myself” is a significant driver in every category of behavioural change. And nearly a quarter (23%) admit that a current driver for buying environmentally friendly products is “to feel less guilty”. In this context, it’s easy to see a mental health benefit in positive action: feeling good by doing good.

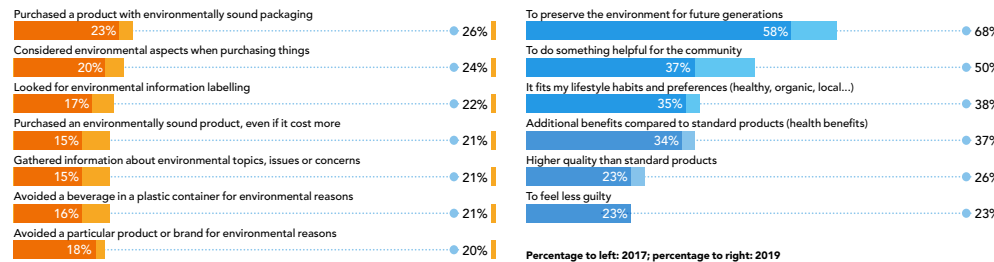
According to our global study, consumers now see themselves as being the most responsible for both the environment and their own health (71% and 74% respectively: see right). Government and politicians are also seen to have a high responsibility for the environment, and are widely trusted to drive change. Brands and retailers feature much lower on these scales (although other research suggests that consumers expect the industry to take action’).

Consumers are already changing their behaviour to include greater environmental awareness in their purchasing decisions on multiple levels (see below). The most frequently cited reason given for buying environmentally

sound products is to preserve the environment for future generations, followed by doing something helpful for the community.² The figures for both have grown significantly since 2017, demonstrating that consumers increasingly want to “do the right thing”.

Looking ahead, there is a widespread ambition to take action to become increasingly environmentally sound and healthier over the next 12 months. One in five say they plan to buy more sustainable packaging and more environmentally sound food and beverage products. Interestingly, while reducing negative impact is the main reason given for this, personal and health factors rate highly too.

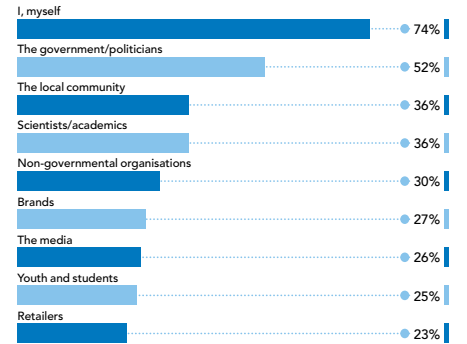
TODAY CURRENT BEHAVIOUR & DRIVERS COMPARED WITH TWO YEARS AGO³



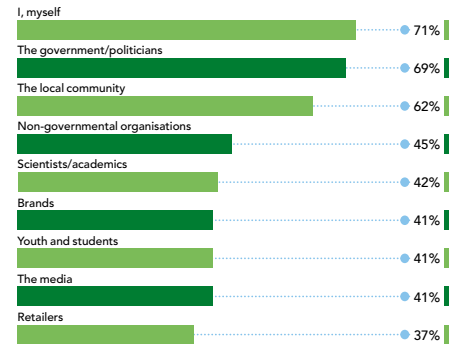
TOMORROW AMBITIONS & DRIVERS FOR THE NEXT 12 MONTHS



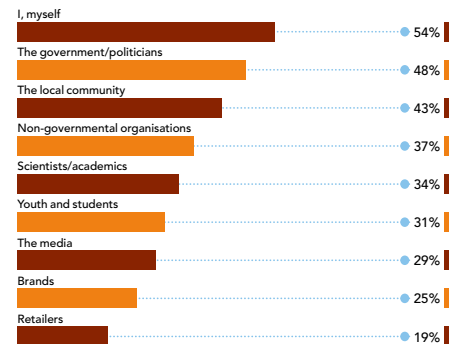
RESPONSIBILITY FOR HEALTH ISSUES



RESPONSIBILITY FOR ENVIRONMENTAL ISSUES



TRUSTED TO DRIVE ENVIRONMENTAL CHANGE



04
FOOD & BEVERAGE IS A KEY CHANGE CATALYST – ESPECIALLY NATURAL/ORGANIC PRODUCTS

Looking at the various drivers of change for health and environmental reasons, the key shared catalyst is greater consumption of environmentally sound food and beverage (see chart). In particular, the sweet spot is natural/organic products (see page 09), the consumption of which is considered a key trait for both healthy and environmentally sound people. Eating less meat and dairy is also associated with both, but to a lesser extent.

Looking at specific products, consumers consider 100% juice to be the healthiest (on 57%, ahead of water on 47%) and also the most environmentally sound (on 44%). White milk and coconut also rate highly on both. Generally, there is a strong correlation between health and environment for most categories, further demonstrating how intertwined these two areas are.

“Natural” is a term that particularly appeals to consumers, again perhaps because it can be closely associated with both health and environment. It rates highest for the most appealing descriptor of food and drink products on 50%. (See also boxout on page 09.)



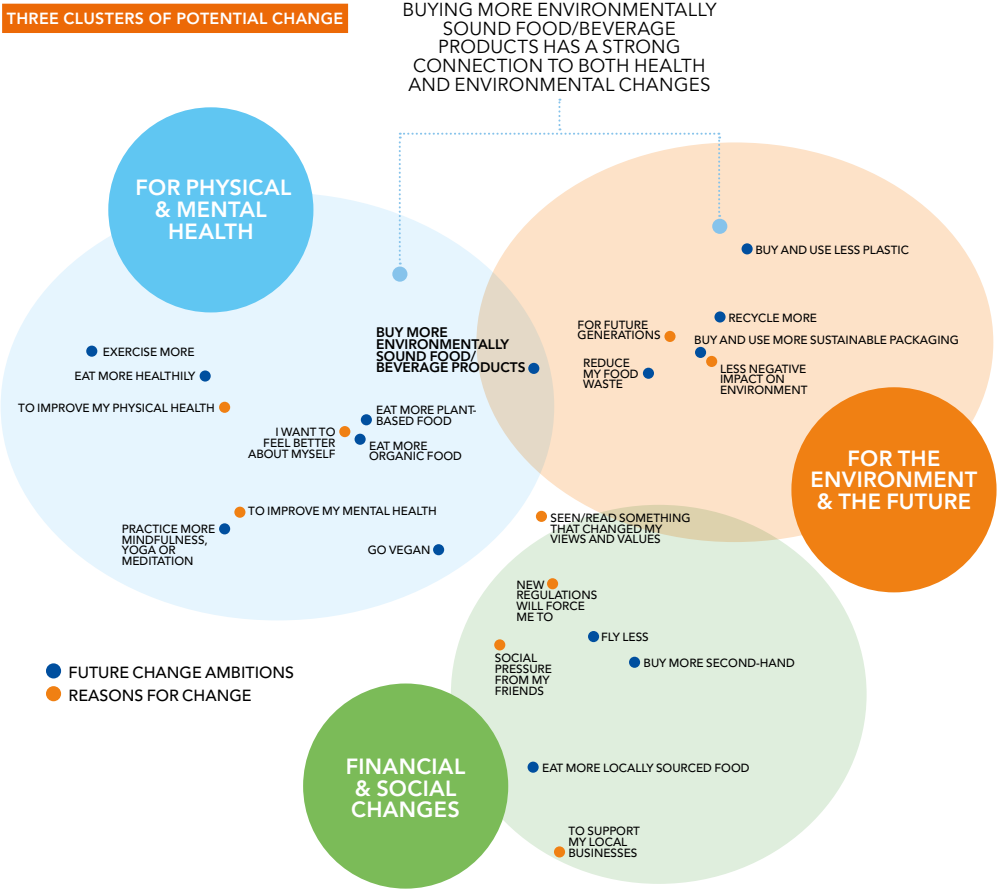
CASE STUDY
MENGNUI MILK DELUXE (CHINA)

Mengniu is the leading player in China’s high-growth premium ambient white milk market, continually finding innovative ways to strengthen its position. The recent successful relaunch of its Milk Deluxe organic brand is a great example, leveraging both new processing techniques and new packaging to create a

product with more protein and better mouthfeel, plus a new on-the-go consumption occasion. Launched in May 2018, the new product was packed in Tetra Prisma® Aseptic 250 Edge with DreamCap™ 26 cartons – a global first for white milk. Marketing focused on its organic,

natural, quality credentials, highlighting that the milk was fully traceable, sourced from a certified organic farm in a pristine environment, from well-cared-for cows fed on a wide range of grasses. The launch campaign included massive TVC airing and outdoor

THREE CLUSTERS OF POTENTIAL CHANGE

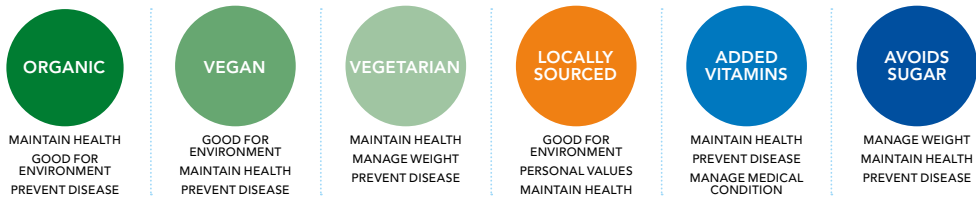


advertising, plus BTL displays and roadshows. The brand also sponsored Super Vocal, a popular Chinese TV talent contest. The result was a sales growth surge and brand share increase from 44% to 48% (Q2 2018 versus Q2 2019). This success was followed in June 2019 by the

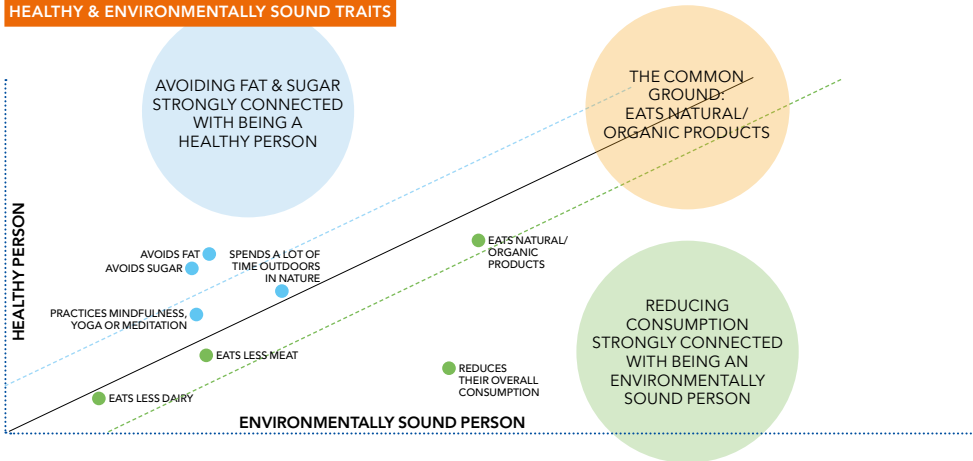
launch of a range of Milk Deluxe-branded health-positioned products, all in the same package, further building on the relationship between organic/natural and health.

2 IN 4 RATE “NATURAL” THE MOST APPEALING PRODUCT DESCRIPTOR (#1 IN SURVEY)

HEALTH & ENVIRONMENT DRIVERS OF DIET CHOICES



HEALTHY & ENVIRONMENTALLY SOUND TRAITS



WHAT DOES "NATURAL" MEAN TO CONSUMERS?

"Natural" is a non-specific term that can have significantly different interpretations. In an Ipsos survey conducted across 28 countries,¹ consumers were asked what "natural" meant to them if communicated on food or beverage packaging. Significantly, "healthy" was in the top three most commonly associated attributes (on 43%), behind "without artificial

ingredients" (52%) and "100% from nature" (44%).

Demographics make a difference: younger age groups (under 35) are more likely to associate "natural" with "organic" (34%), while older age groups (50 to 64) tend to believe it to mean "without artificial ingredients" (57%). Females are also significantly more likely to focus

on the ingredients, while males are more likely to associate natural with "authentic". Geographically speaking, there are more consistencies than differences across the markets surveyed. However, "sustainably produced" ranks particularly highly in Germany (on 23%), while "ethically produced" stands out in China (on 19%), rating higher than any other market.

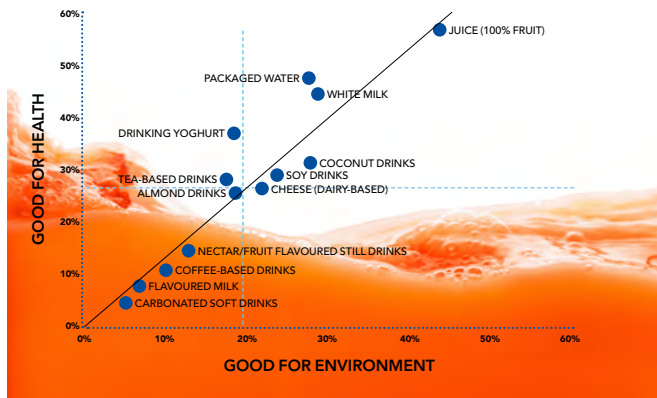


3 IN 5 ASSOCIATE "NATURAL" WITH "HEALTHY" ON FOOD & DRINK PACKAGING

ORGANIC FOOD RATED HIGHEST AS GOOD FOR ME & PLANET



100% FRUIT JUICE SEEN AS EXCELLENT FOR HEALTH & ENVIRONMENT



CASE STUDY CLEAN LABEL YOGHURT

There is a strong drive in the global dairy industry towards more premium, value-added products. Yoghurt is a good example. It is seeing excellent growth in many markets, notably China, and consequently brands are striving to introduce broader ranges, including varieties that meet the growing demand for more natural, additive-free "clean label" products. However, this can be a technical challenge.

Yoghurt is a special and quite sensitive product. While it can be very natural, consisting of only starter bacterial culture added to milk, over the years brands have added a variety of ingredients to control its stability, viscosity, texture, flavour and mouthfeel, and so forth.

To create clean label yoghurt, every ingredient's properties and effects, and every processing step, must be balanced in order to get a consistent result that meets consumer needs. In general, the more sensitive and controlled the processing, the fewer additives are required, and the more natural the final product will be. For guidance on how to achieve this, Tetra Pak has produced a white paper called *Introducing Clean Label Yoghurt: Designing Alternatives to Additives*. To download this white paper, [click here](#).

05

BARRIERS TO CHANGE REMAIN, BUT ARE EVOLVING

As has long been the case, cost is cited by consumers as the biggest barrier to becoming more environmentally friendly, with 36% saying that environmentally sound products are more expensive/cost too much.

That said, this is significantly less than the figure for healthy products (48%). Moreover, our environmental research shows that price is now declining as an issue for products with environmentally sound packaging specifically: down from 46% in 2017 to 42% in 2019.¹ Other Tetra Pak research also shows that 78% of consumers are now happy to pay more for products with environmentally sound packaging, while only 41% are willing to pay more for healthier food.²

Such environmentally sound packaging also positively impacts brand consideration – and this is a growing trend. 53% of consumers today say that environmentally sound packaging makes them much more likely to consider a brand, up from 43% in 2017 and 39% in 2015.³

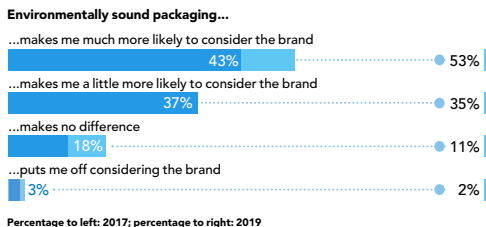
However, while figures show that interest in environmentally sound products is growing, they show levels of frustration are rising too,

notably around the lack of information on, or inability to distinguish, environmentally sound products. This underscores the importance of using on-package logos that consumers know they can trust: 91% of consumers say they look for environmental logos when shopping, with more than half (54%) saying they do so always or often. Again, this is a growing trend.⁴

BARRIERS TO ENVIRONMENTALLY SOUND LIFESTYLE



ENVIRONMENTAL PACKAGING & BRAND CHOICE⁵



CASE STUDY FLOW (CANADA & USA)

A family-owned business and an innovative player in the water market, Flow is leading the way in sustainable water packaging. After a 2015 trip to Burning Man left him eager to come up with an environmentally friendly alternative to plastic water bottles, founder and CEO Nicholas Reichenbach was inspired to create Flow.

Flow is an alkaline spring water product that contains naturally occurring essential minerals and electrolytes. The water is sourced in both the USA and Canada. The Canadian source in South Bruce County, Ontario is a family-owned artesian spring dating back five generations. Flow aims to promote individual wellness through their alkaline spring water, as well as environmental health through their efforts to reduce their carbon footprint.

Committed to sustainable business practices, Flow is a B Corp-certified company. Furthermore, Flow water is packaged in 500ml and 1000ml Tetra Prisma® Aseptic packages that are made from 68% renewable materials, featuring a plant-based cap made from renewable sugarcane, and FSC™-certified paperboard. Each package is recyclable.



CASE STUDY VALIO (FINLAND)

Founded in 1905, Valio is the biggest dairy business in Finland and a major exporter, with total net sales of €1.7 billion.

Describing itself as “the most innovative dairy in the world”, Valio holds more than 300 patents in 50 countries. Recent health-focused innovations include its Valio Oddlygood® range of plant-based dairy alternative products,

consisting of snacks and drinks made with oats; and Valio MiFU®, a milk protein alternative to meat.

Valio has highly ambitious goals in sustainable milk production, aiming to cut Finland’s dairy carbon footprint to zero by 2035. Actions in this area include: carbon farming; 100% soy free, grass-only feeding; building a network for recycling manure

and nutrients into biogas and fertiliser; and biogas-fuelled milk trucks.

Valio also has an environmentally smart packaging approach, which aims to: minimise food waste and climate impact; prefer renewable packaging materials and increase the use of recycled raw materials; design packages for recycling; and reuse transport packaging.

In 2015, Valio became the first company to launch a fully renewable, plant-based package: the Tetra Rex® Bio-based carton. Since the end of 2018, all Valio’s gabled milk, sour milk, cream and yoghurt have been packed in fully renewable material.

In 2019, Finns voted Valio the most sustainable company in Finland for the sixth year running.



4 IN 5 HAPPY TO PAY MORE FOR FOOD & BEVERAGE PACKAGING THAT IS ENVIRONMENTALLY SOUND

06

PACKAGING MATTERS: PLASTIC LITTER & CIRCULARITY IN THE SPOTLIGHT

"Some of the things that I thought were recyclable are no longer being picked up. Like the bag the newspaper comes in. I just feel awful throwing a plastic bag in the garbage, but I don't know what else to do."

— FEMALE, 63, USA

"We need to start doing things. We can't consume products like we do today, we just can't. We need to be aware of what's sustainable."

— FEMALE, 41, UK

Packaging and specifically recyclability are pivotal to the environmental debate. Recycling is now considered the #1 trait (on 63%) of an environmentally sound person, and 39% of all consumers say they are keen to read and learn more about it.

Recyclability is also the #1 association with environmentally sound products (on 19%), although it now shares the top spot with biodegradability, which has jumped 5% since 2017.¹ And recyclability is the third most appealing descriptor of a food or drink package overall (on 34%), after natural ingredients and no additives.

However, there are strong issues around recycling today, with lack of availability (24%) and difficulty (21%) cited as barriers. Perhaps more worrying is scepticism about whether recycling really works, with 30% saying that they see mixed waste in sorted bins, for example.

In consumer interviews, a notion prevails that efforts towards improving one's own health are easier, more effective and more tangible than individually trying to improve the current state of the planet – which is perhaps not surprising.

FOCUS ON PLASTIC LITTER

Plastic, particularly its impact on the oceans, is currently receiving much negative attention, boosted by images of suffering sealife that have circled the world.

Moreover, anti-plastic legislation is growing: for example, 127 countries had restrictions on plastic bags by last year,

according to the UN, while new EU rules target single-use plastic products (and fishing gear) that make up 70% of marine litter.²

Anti-plastic sentiment comes through strongly in our global research study. Avoiding plastic is now the #2 trait of an environmentally sound person on

58%, and a third of all consumers say they plan to buy and use less plastic within the next 12 months. It is the #3 change ambition after regular favourites "exercise more" and "eat more healthily". Buying products with no/minimum packaging also registers highly as an environmental trait, on 47%.

In the UK and USA, environmentally sound consumers do tend to choose packaging that is recyclable, if options are available. But many now realise that some plastic items cannot be recycled, and some therefore try to find their own ways of reusing them. Others feel they are being forced to resort to throwing things in the trash – and this often makes them feel guilty.

In developing or recently developed countries, there is a lack of confidence that any individual efforts towards sustainability really count in the bigger scheme of things. This is particularly alarming since there is also a mistrust of big companies that are perceived to be profiting from people's misfortunes.

CASE STUDY WALDORF ASTORIA (THAILAND)



Opened in 2018, the Waldorf Astoria Bangkok is the first Waldorf Astoria hotel in Southeast Asia, occupying the top three floors of a landmark 60-storey building in a high-end shopping district.

As part of its ongoing commitment to minimise single-use plastics on its property, the hotel provides guests in their rooms with water in Waldorf Astoria-branded Tetra Prisma® Aseptic 500ml packages, rather than in the usual plastic bottles, along with straws made from corn husk.

The hotel also educates guests about how such beverage cartons are recycled through the Green Roof Project, which turns used packages into roofing sheets to provide emergency shelter for people in need after natural disasters.

CASE STUDY JUST WATER (USA)

JUST Goods, Inc. is a packaged goods company putting sustainability at the forefront of its business model. Its core product is JUST Water: 100% responsibly sourced spring water in a plant-based package.

In the USA, the water is sourced in Glens Falls, NY from a watershed that totals approximately three billion gallons and is consistently replenished by rain and snow. The community uses only about half the available water and JUST bottles a fraction of the excess. JUST also values the water fairly, paying six times the municipal water rate, thereby contributing to

the economic growth of the Glens Falls community and improvements in local water infrastructure.

JUST Water is packaged in 330ml and 500ml Tetra Top® cartons: 54% of the carton is paperboard made from FSC™-certified trees, and 28% is plastic derived from sugarcane, totalling 82% renewable materials. The packaging materials are shipped in flat rolls, the



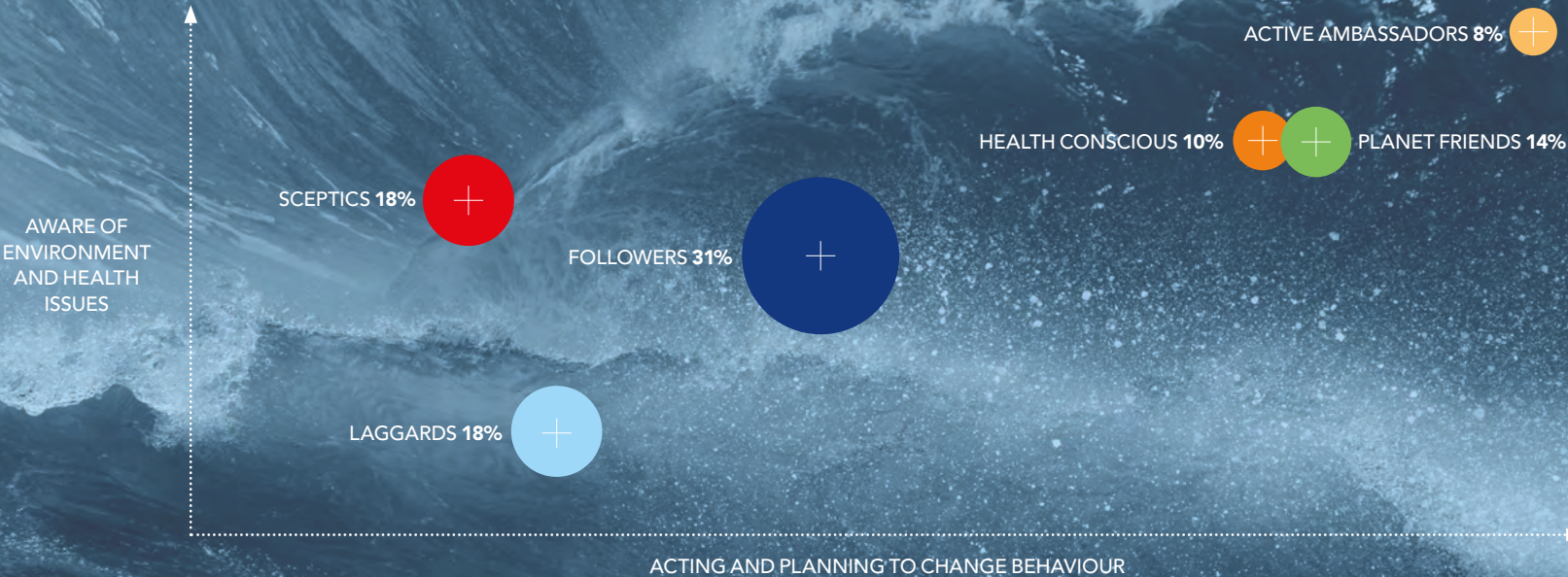
cartons can be refilled, and they're also fully recyclable: all factors that lead to a 74% reduction in harmful CO2 emissions compared with similarly sized plastic bottles.



2 IN 4 SAY THAT SUSTAINABLE PACKAGING MAKES THEM MORE LIKELY TO CONSIDER A BRAND

CONSUMERS: SIX NEW SEGMENTS

Analysing the different levels of awareness, attitudes and engagement/behaviour around both environment and health reveals an important new segmentation of consumers. There are six types – **Active Ambassadors, Planet Friends, Health Conscious, Followers, Sceptics and Laggards** – each with their own distinct beliefs, values and information sources, and their own ambitions and drivers for change, creating clear opportunities for both targeted products and messaging.



ACTIVE AMBASSADORS

SEGMENT SIZE 8%

High engagement in all aspects of health and environment. Very willing to take action, challenge boundaries and influence others. Top score on belief that environment issues impact on health.

CHANGE INDEX



47% plan to change at least two things to live in a more environmentally sound way



68% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
46%



Female
54%

AGE

16-24	15%
25-34	27%
35-44	27%
45-54	15%
55-65	10%
66+	5%

EDUCATION

Low	1%
Medium low	20%
Medium high	52%
High	26%

Children under 18 in home 52%

More urban

OVER-INDEXING COUNTRIES

Indonesia 11%	India 11%	China 14%	Brazil 12%

OVER-INDEXING FIGURES ARE HIGHLIGHTED IN RED THROUGHOUT



ACTIVE AMBASSADORS

SEGMENT SIZE 8%



LIFESTYLE

93% believe environmental issues have a high impact on health

80% actively try to influence their friends with their views

20% already have a fully healthy lifestyle

21% already have an environmentally sound lifestyle

BARRIERS



ENVIRONMENT

Lack of waste management where I live



HEALTH

Healthy food is not widely available where I live

Have fewer barriers since they already live a healthy/environmentally sound lifestyle

BEHAVIOUR



ENVIRONMENT

I engage with communities that really stand for improving the environment

I express my thoughts and beliefs around the environment on social media, blogs etc

I actively seek new experiences with less impact on the environment



HEALTH

I use the latest trends and findings to improve my health

I always love to test my boundaries and experience new and exciting activities that improve my health



PACKAGES

Will pay more for environmentally sound packaging

Believe recyclable and reusable packages are good for health

Will buy more sustainable packaging

PRODUCT ATTITUDES

Would sacrifice convenience for environmentally sound products

Strongly believe that meat-based is bad for health and the environment

Will buy more environmentally sound products, eat more organic and buy more second-hand

PRODUCT FEATURES

Natural ingredients
Organic
Locally sourced

GOOD FOR HEALTH & ENVIRONMENT

100% juice

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

NGOs, scientists, brands



HEALTH

NGOs, scientists, school

PLANET FRIENDS

SEGMENT SIZE 14%

Engaged and willing to take action about the environment. Also high engagement on most aspects of health, particularly for peace of mind. Less inclined to challenge boundaries, try new things and act as influencers.

CHANGE INDEX



42% plan to change at least two things to live in a more environmentally sound way



68% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
45%



Female
55%

AGE

16-24	15%
25-34	22%
35-44	24%
45-54	16%
55-65	12%
66+	10%

EDUCATION

Low	2%
Medium low	24%
Medium high	56%
High	19%

Children under 18 in home 37%

More small urban areas

OVER-INDEXING COUNTRIES



Spain
28%



Brazil
20%



UK
18%



PLANET FRIENDS

SEGMENT SIZE 14%



LIFESTYLE

72% believe environmental issues have a high impact on health

57% actively try to influence their friends with their views

18% already have a fully healthy lifestyle

22% already have an environmentally sound lifestyle

PACKAGES

Will pay more for environmentally sound packaging

Will use less plastic and buy more sustainable packaging

Will recycle more

BARRIERS



ENVIRONMENT

Costs too much



HEALTH

Costs too much

Have fewer barriers since they already live a healthy/environmentally sound lifestyle. Feel guilty about the environment

PRODUCT ATTITUDES

Would sacrifice convenience for environmentally sound products

Strongly believe that meat-based is bad for health and the environment

Believe unprocessed/raw is good for health

Will reduce overall consumption and reduce food waste

BEHAVIOUR



ENVIRONMENT

I am adopting ways of reducing my negative impact on the environment

I actively seek new experiences with less impact on the environment

I need to understand the impact of environmental issues before acting



HEALTH

Good health positively impacts my well-being: I feel less stressed

PRODUCT FEATURES

Recyclable packages
Plant-based
Unprocessed/raw

GOOD FOR HEALTH & ENVIRONMENT

Oat drinks
Coconut drinks

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

NGOs, scientists



HEALTH

Scientists, doctors

HEALTH CONSCIOUS

SEGMENT SIZE 10%

Aware and engaged about environment, but even more so about health. Prepared to try new things, and to pay more and sacrifice convenience for healthy products. Particularly influenced by social media and forums. Follow trends, but not trend-setters.

CHANGE INDEX



37% plan to change at least two things to live in a more environmentally sound way



70% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
49%



Female
51%

AGE

16-24	20%
25-34	25%
35-44	25%
45-54	14%
55-65	9%
66+	7%

EDUCATION

Low	1%
Medium low	20%
Medium high	60%
High	19%

Children under 18 in home	46%
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OVER-INDEXING COUNTRIES



China
24%



HEALTH CONSCIOUS

SEGMENT SIZE 10%



LIFESTYLE

- 70% believe environmental issues have a high impact on health
- 66% actively try to influence their friends with their views
- 15% already have a fully healthy lifestyle
- 16% already have an environmentally sound lifestyle
- Strong personal views about health, eg "Looking good & being healthy are strongly connected"

BARRIERS

ENVIRONMENT

No over-indexing attribute

Will use cars less

HEALTH

Healthy food is not widely available where I live

BEHAVIOUR

ENVIRONMENT

No over-indexing attributes

HEALTH

I am using the latest trends and findings to improve my health

PACKAGES



Believe packages from renewable sources are good for the environment

PRODUCT ATTITUDES

- More willing to sacrifice convenience and pay more for healthier products
- Will buy more environmentally sound products

PRODUCT FEATURES

Organic
Natural ingredients

GOOD FOR HEALTH & ENVIRONMENT

Soy drinks
White milk

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

Social media/forums, politicians



HEALTH

Social media/forums

FOLLOWERS

SEGMENT SIZE 31%

Engage enough with health and environmental issues to feel guilty about both, but not inclined to change behaviour or try new things. Need to know more and be persuaded and energised to act. Sizeable mainstream cohort with interesting potential.

CHANGE INDEX



29% plan to change at least two things to live in a more environmentally sound way



67% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
51%



Female
49%

AGE

16-24	18%
25-34	24%
35-44	21%
45-54	18%
55-65	12%
66+	8%

EDUCATION

Low	2%
Medium low	27%
Medium high	54%
High	17%

Children under 18 in home 37%

More rural

OVER-INDEXING COUNTRIES



South Korea
52%



Indonesia
36%



FOLLOWERS

SEGMENT SIZE 31%



LIFESTYLE

59% believe environmental issues have a high impact on health

40% actively try to influence their friends with their views

12% already have a fully healthy lifestyle

16% already have an environmentally sound lifestyle

BARRIERS



ENVIRONMENT

Costs too much



HEALTH

Costs too much

Healthy food is not tasty

Want to live with minimal impact on the environment, but not yet actively doing so. Feel guilty about both health and environment. Aware that a change is needed. Claim they will start by exercising more and taking up yoga/mindfulness

BEHAVIOUR



ENVIRONMENT

I randomly make choices that are good for the environment – but only when it suits me

I need to understand the impact of environmental issues before acting



HEALTH

Good health positively impacts my well-being: I feel less stressed

PACKAGES



Believe that reused packs might be bad for health and the environment

PRODUCT ATTITUDES

Prioritise avoiding products that are bad for health over buying products that are good for health

Strongly believe that meat-based is bad for both health and the environment

Will eat more healthily, reduce food waste and decrease overall consumption

PRODUCT FEATURES

Seasonal food
Fairtrade

GOOD FOR HEALTH & ENVIRONMENT

Packaged water

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

TV/radio or none



HEALTH

TV/radio or none

SCEPTICS

SEGMENT SIZE **18%**

Lower engagement on both health and environmental issues. Cautious about technology and social media. Not inclined to challenge boundaries or try new things. Will only change when it fits their lifestyle.

CHANGE INDEX



19% plan to change at least two things to live in a more environmentally sound way



55% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
55%



Female
45%

AGE

16-24	18%
25-34	23%
35-44	20%
45-54	17%
55-65	11%
66+	11%

EDUCATION

Low	2%
Medium low	30%
Medium high	49%
High	18%

Children under 18 in home 41%
More small urban areas and rural

OVER-INDEXING COUNTRIES



US
30%



UK
25%



Saudi Arabia
20%



SCEPTICS

SEGMENT SIZE 18%



LIFESTYLE

- 51% are tired of the fuss about the environment
- 34% actively try to influence their friends with their views
- 16% already have a fully healthy lifestyle
- 13% already have an environmentally sound lifestyle

BARRIERS



ENVIRONMENT

"They put my sorted waste together anyway so why bother?"



HEALTH

- A healthy lifestyle would be too boring
- Healthy food is not tasty

More than average say they don't care about the environment or don't believe their lifestyle affects it. But many say that a healthy lifestyle is important. Score low on changes for the future

BEHAVIOUR



ENVIRONMENT

- I go with the flow and do what my friends do
- I randomly make choices that are good for the environment – but only when it suits me
- I am aiming at going back to basics and detaching from technology and social media



HEALTH

No over-indexing attributes

PACKAGES



Believe that reused packs might be bad for health

PRODUCT ATTITUDES

- Prioritise avoiding products that are bad for health over buying products that are good for health
- Believe new technology is a risk for health and plan to reduce time online
- Believe meat-based food is good for health

PRODUCT FEATURES

Locally sourced
Seasonal food
Vitamins-added

GOOD FOR HEALTH & ENVIRONMENT

Cheese

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

Retailers, family/friends, politicians, doctors – or none



HEALTH

Retailers, politicians, family/friends

LAGGARDS

SEGMENT SIZE 18%

Low knowledge of/interest in all aspects of health and environment. Sceptical of new technology. Claim willingness to take action and challenge boundaries, but score low on planned changes for the future and high on “live for today”. Actively try to influence others.

CHANGE INDEX



16% plan to change at least two things to live in a more environmentally sound way



42% plan to change their exercise or food habits or both to live more healthily

GENDER



Male
52%



Female
48%

AGE

16-24	20%
25-34	31%
35-44	25%
45-54	15%
55-65	5%
66+	3%

EDUCATION

Low	4%
Medium low	23%
Medium high	50%
High	22%

Children under 18 in home	49%
More urban	

OVER-INDEXING COUNTRIES



Saudi Arabia
46%



India
22%



Brazil
20%



LAGGARDS

SEGMENT SIZE 18%



LIFESTYLE

42% believe environmental issues have a high impact on health

57% actively try to influence their friends with their views

12% already have a fully healthy lifestyle

8% already have an environmentally sound lifestyle

BARRIERS



ENVIRONMENT

They put my sorted waste together anyway

I'm too busy to focus on the environment

I don't know how to be more environmentally sound



HEALTH

A healthy lifestyle would be too boring

I want to live a healthy life but don't know how

I have more focus on my children's health than mine

Above average say they don't care about the environment and that healthy lifestyle unimportant

BEHAVIOUR



ENVIRONMENT

I go with the flow and do what my friends do

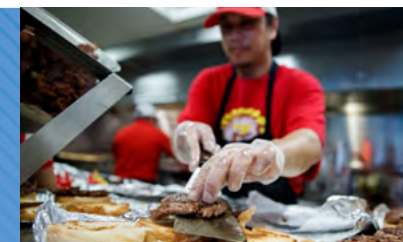
I randomly make choices that are good for the environment – but only when it suits me

I am aiming at going back to basics and detaching from technology and social media



HEALTH

No over-indexing attributes



PACKAGES

No over-indexing attributes

PRODUCT ATTITUDES

New technology is a risk for personal health

Strongly believe that meat-based food is good for health and the environment

PRODUCT FEATURES

Vitamins-added
Meat-based

GOOD FOR HEALTH & ENVIRONMENT

Flavoured milk

SOURCES FOR ADVICE/INSPIRATION



ENVIRONMENT

Retailers, brands, family/friends, politicians, doctors, school – or none



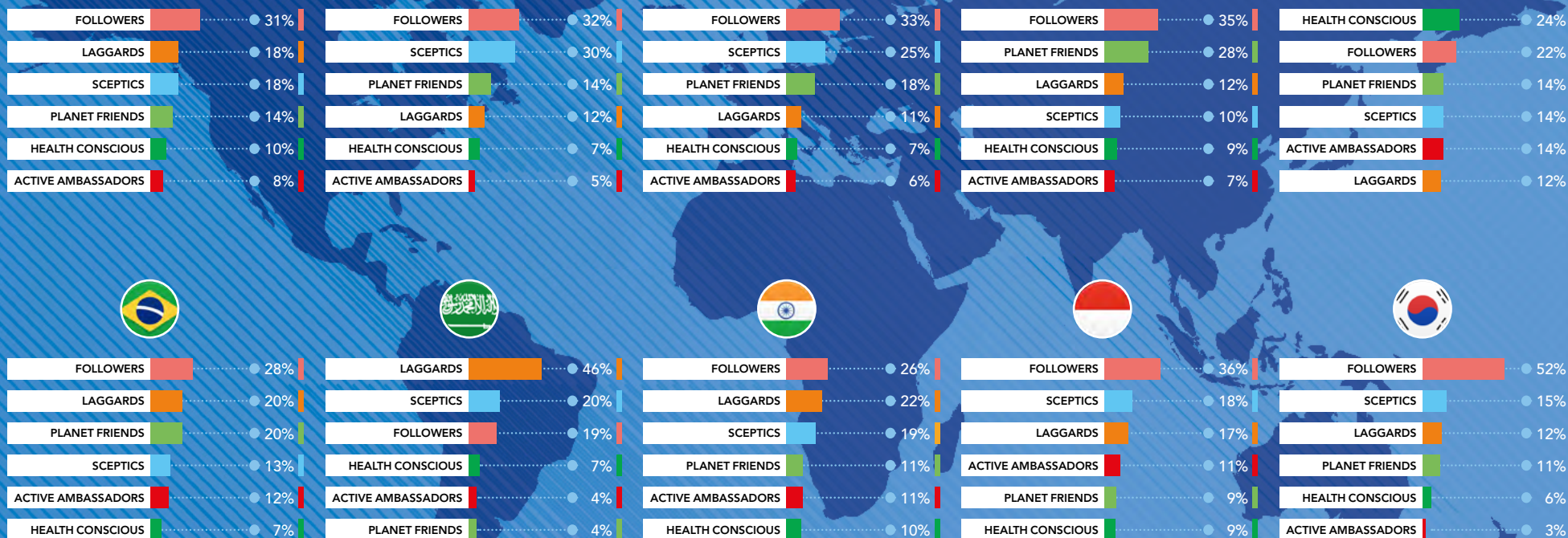
HEALTH

Retailers, politicians, brands, school – or none

WHERE THEY ARE

A GLOBAL VIEW

TOTAL



PERCENTAGES
MAY NOT
TOTAL 100%
DUE TO
ROUNDING

WHERE THEY ARE

FIVE MARKET SNAPSHOTS¹

BRAZIL



The environment holds a vital place in Brazilian culture, due to the vast scale and biodiversity of nature here.

Environmentalism has long been strong and multi-sectoral, including NGOs, business, arts, education and brands, reflected in the high percentage of Active Ambassadors and Planet Friends here. Meanwhile, modernisation of society has introduced more lifestyle-related illnesses, driving greater interest in health and wellness.

There is a strong beauty aspect to health, with a high focus on sculpting the body. Supplements and formulations that claim to be “light” or “slimming” are important, and cosmetic surgery is relatively commonplace.

The Amazon in particular offers a strong link between health and the environment, as it is such a potent source of medical and wellness ingredients, as well as being “the world’s lungs”. Its deforestation is driving rising concern, exacerbated by the record fires this summer. This is making consumers even more interested in eco-branded and natural products, which are marketed with health, beauty and sustainable benefits alike.

“Interest and concerns about health and the environment converge in the consumption of natural food and cosmetic products. Many products used in cosmetics are also marketed as uniquely healthy ‘superfoods’, such as the açai berry and cupuaçu fruit. So, in fact, there is overlap between interest in the environment, health and aesthetics.”

UK



Britain’s long-held vision of good health for all is now being strained due to an ageing population and an increase in chronic diseases. Meanwhile, public concern for the environment is growing, boosted by strong celebrity interest, and popular and influential TV programmes such as Blue Planet. Climate change, air pollution, plastic and waste generally are all hot topics.

This is a turbulent time for the UK, as if the well-worn deck of cards that describes its core values and norms has been tossed into the air. Changing attitudes to food purchasing and consumption can be seen as a part of that. Young consumers in particular are connecting food, health and the environment, and flexitarians, vegetarians and vegans are becoming increasingly mainstream.

It’s not surprising, then, that there are many Planet Friends in the UK. But, demonstrating the strong divisions of opinion here today, there are a lot of Sceptics too.

“We are seeing vibrant culture change around health and environment growing from the local and grassroots levels, well away from the political and lobbying spheres. Action is being driven especially by young people, who have a very different experience of the UK compared with generations before them, and who are facing a very uncertain future.”

USA




Many in the USA don’t yet see a clear link between health and environment, and there is a high percentage of Sceptics here. Generally speaking, USA culture is all about “new” and “better”: embracing products and services that are faster, cheaper, easier, tastier and more fun. If the convergence of health and environment doesn’t offer this, it will be hard to change mass consumer behaviour. That said, there is a growing trend of linking personal and planetary wellness, and even though it remains a niche area, it still embraces a lot of people due to the size of the population.

“With each passing hurricane, flood, and heat wave, consciousness about climate change is rising in the USA, and rising fast. It’s very reasonable to assume that consumer beliefs and practices about the environment are going through rapid transformation. Each disaster seems to convert more followers, even in politically conservative regions. Thus, commodities that can claim to be part of a solution may make significant inroads in what could swiftly become a mass change in culture.”

WHERE THEY ARE

FIVE MARKET SNAPSHOTS


CHINA

 China has significant environmental problems as a result of rapid development – hence air pollution is the #1 consumer concern for health and environment alike (on 50% and 70% respectively: the highest figures anywhere). This helps to explain why China has so many Active Ambassadors and Health Conscious consumers.

Health and wellness is a huge trend here. As elsewhere, this roughly divides into two: supplemented/functional products, and pure and natural. Provenance is very important for this second category, particularly for dairy, and a “clean” environment is a key factor: hence the popularity of premium imported milk from New Zealand, Australia and Europe. Interestingly, Chinese consumers can have quite a contradictory attitude to dairy: they see it as healthy, yet they can be resistant to the healthier options, as they like products that are tasty and creamy.

“The government is keen to action a sustainability agenda and can demand action in specific areas, so brands need to be environmentally aware for that reason at least. As for consumers, they generally expect quality of life to be better in the future, and sustainability can be seen as part of that.”

SAUDI ARABIA

 The impact of rapid modernisation and wealth on lifestyles, combined with a sedentary tradition due to the very hot climate, have contributed to a number of health problems in the Kingdom of Saudi Arabia. Today, it has one of the highest rates in the world for obesity, diabetes and cardiovascular disease, despite boasting first-class healthcare.

Excessive consumption and a throwaway culture have also caused serious waste management issues, while interaction with nature is severely limited by the searing temperatures outside. Consequently, the link between personal and planet health has historically not been strong in Saudi Arabia, hence the large size of the Laggards segment. But attitudes are changing.

The younger generation – the overwhelming majority of the population – is keenly aware of the negative consequences of their parents’ lifestyles, largely due to their heavy social media usage. Government is also taking action, boosting spending on sports, health and fitness, and introducing heavy sugar taxes on beverages. Further afield, sustainability is one of the key themes for Expo 2020 in Dubai, which is likely to have an impact on the whole region.

“The younger generation is far more aware of the urgency of health than their Baby Boomer and Generation X parents. They have demanded and received billions of dollars of government and private funding for new healthy initiatives. They have also launched businesses centred around health, fitness, wellbeing, sustainability, eco-friendly management, waste and pollution control, and short-term solutions to long-term harmful habits. They are fully aware of the need to act now to save the country for future generations: societally, climactically, medically and economically.”

SPOTLIGHT ON PLANT-BASED

The fast-growing plant-based sector sits squarely in the sweet spot between health and environment. Indeed, attitudes towards these products generally indicate where on the segment spectrum consumers fall: the more aware and focused on change they are, the more likely they are to believe that

CASE STUDY

SATINE (CHINA)

Satine, a premium white milk brand from Chinese dairy giant Yili, has recently upgraded its organic milk into Tetra Prisma® Aseptic 250 Edge with DreamCap™ 26. The organic milk has been the star product of the Satine range, and the core of its brand positioning for more than 10 years. With increasing consumer demand for healthier and higher quality products, Yili decided to further enhance Satine’s premium image and make its brand positioning more relevant and more tangible to modern consumer lifestyles.

The milk has been upgraded with higher protein content, and also offers a supreme drinking

plant-based is good for both them and the planet.

However, there are interesting regional differences. Health and environment is a particularly key driver in mature markets, but it’s more likely to be a cultural/traditional choice in developing markets. For example, India,



experience. The new shape, design and functionality give a fresh look and supports the refined positioning: “opening up organic lifestyle”. This reflects a number of trends, such as getting closer to nature, being physically active and looking for a more balanced life with family. The DreamCap™ 26 is also an innovative element to support on-the-go consumption for today’s busy and active Chinese consumers.

The brand is running thematic consumer activations such as “share your organic life”, “going green” and “exploring arts”, with both mass media and social viral communication.

which has a strong vegetarian tradition, leads by some margin for consumers looking for plant-based products. Moreover, Laggards have a relatively high interest in plant-based, which again can be due to a cultural effect: in countries where their numbers are strong, plant-based products are more traditional.

HOW TO CONNECT STRATEGIES FOR EACH SEGMENT



ACTIVE AMBASSADORS



PLANET FRIENDS



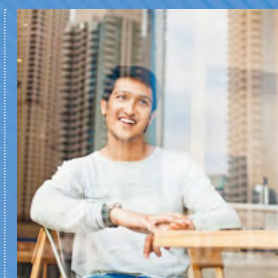
HEALTH CONSCIOUS



FOLLOWERS



SCEPTICS



LAGGARDS

CHANGE INDEX



68%



47%



63%



42%



70%



37%



67%



29%



55%



19%



42%



16%

SPECIFIC MOTIVATIONS

Animal welfare
Future generations

Less negative impact on environment
Future generations

Less negative impact on environment
Seen/read something that changed my views and values

Better physical health
I want to feel better about myself

Social pressure from family and friends
Regulations

Social pressure from family and friends
Regulations

HOW TO APPROACH

Use them as influencers and as part of expert groups. Bring them more expertise, news and facts

They want to hear and understand the facts. Channel viewpoints and research from scientists

Inspire them to find new ways to improve their health. Stimulate interaction with their peers via social media

Give them the nudge and support they need. Make change as easy as possible. Provide encouragement and helpful instruction

Reach out on a local, grassroots level. They need to be convinced by those they recognise and trust: "people like us"

Give them more exposure to the issues and knowledge in general

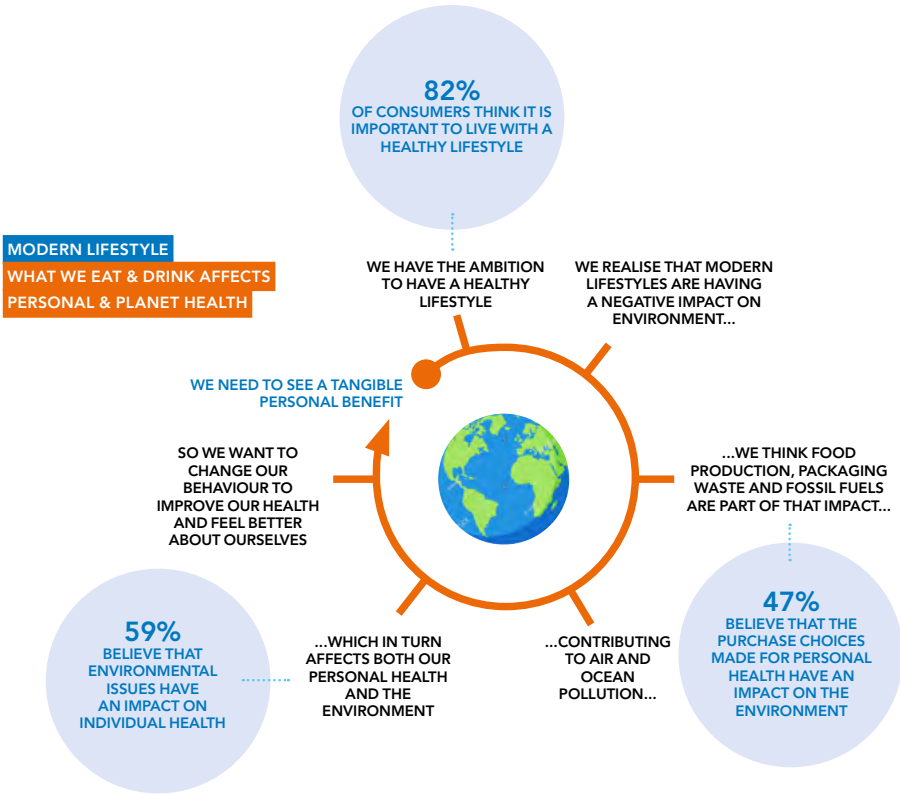
SUMMARY & CONCLUSIONS

01 The environment and health are the two top concerns for consumers today, and they occur in that order. Two-thirds of those polled in our global consumer research study believe that we are heading towards an environmental disaster. The same proportion also believe that mental and physical health are of great concern for society.

02 Health and environment have historically been treated as separate areas. But now they are increasingly overlapping. Nearly three out of five consumers already think that their health and well-being are strongly affected by environmental problems. The more concerned about the environment they become, the more health-conscious they become too. What was once a distant, abstract concern has become much more concrete, urgent and, crucially, personal, as consumers come to see environmental problems impacting on themselves and their families.

03 The young are a strong driving force for positive change. They want and expect to be healthier and live longer than their parents, and they are making lifestyle choices accordingly. Their use of social media and their personal experience of the impacts of climate change are also urging them to act more responsibly towards the environment.

04 Consumers believe they carry responsibility for both their own health and the health of the planet. There is a



growing belief that modern lifestyles, particularly what we eat and drink, result in a cycle that negatively impacts on both (see above). Many want to change their consumption behaviour accordingly – but cost, lack of knowledge, lack of availability and/or credibility of options are all major barriers. There is an interesting opportunity for brands that can help consumers to overcome these barriers and meet their growing need to live healthier, more environmentally sound lives.

05 Food and drink is a key catalyst in the convergence of health and environment. The #1 change ambition for both health and environmental reasons is greater consumption

of more environmentally sound food and drink products. In particular, the sweet spot is natural/organic products. In terms of categories, 100% fruit juice, white milk, packaged water, coconut water and plant-based drinks are the most compelling.

06 Packaging, and recyclability specifically, are critical. Recycling is now considered the #1 trait of an environmentally sound person. Recyclability is the joint top association with environmentally sound products and the third most appealing descriptor of a food or drink product overall. Nearly four out of five of consumers globally are now happy to pay more for environmentally

sound food and beverage packaging, while just over two out of five say they will pay more for healthier food.

07 Anti-plastic sentiment is strong. Nearly two out of three consumers believe that an environmentally sound person avoids plastic, and one in three say they plan to buy and use less plastic within the next 12 months.

08 Our research analysis reveals six global consumer segments with distinct profiles relating to awareness/concern for their health and the environment. Each group has its own distinct beliefs and values; drivers and ambitions for change; and trusted information sources. This creates opportunities for targeted products, messaging and more.

09 The most successful brands going forward will be those that can demonstrate purpose and show that they are making a positive contribution to society beyond just providing good services and products. However, both our quantitative and qualitative global research reveals a trust gap when it comes to health and the environment. Moreover, brands currently come way down the list of influencers in this area: only one in ten consumers take advice or inspiration from brands on either of these topics.

10 Food and beverage is perhaps the first industry to see the emerging trend for convergence of health and environment. It provides a new opportunity for brands to make a powerful, purposeful, personal connection with consumers by addressing and communicating both at the same time.

RESEARCH & REFERENCES

Research methodology

The research for this Index is based on the following:

- The Convergence of Health & Environment. An integrated global study by Ipsos, specially commissioned by Tetra Pak, to understand whether or not concern for health overlaps with concern for the environment. The study involved quantitative research based on 1,000 online consumer interviews carried out in May 2019 in each of nine markets: Brazil, China, India, Indonesia, Kingdom of Saudi Arabia (KSA), South Korea, Spain, UK and USA. This was followed up by qualitative research based on five deep dive consumer interviews in each of five markets: Brazil, Indonesia, Saudi Arabia, UK, USA. In addition, Ipsos leveraged its Cultural Insight Network to commission five social science experts to write focused essays on health and environment in their culture of focus: Brazil, Indonesia, KSA, UK, USA. All figures and quotations in this Index are based on this integrated global study, unless otherwise stated.

- Tetra Pak Environment Research. A consumer research study conducted by Tetra Pak in order to identify new market trends, as well as opportunities and threats, in relation to the environment. Published in July 2019, it involved online quantitative interviews with a total of 7,500 consumers, made up of 500 in each of 15 markets: Brazil, China, France, Germany, India, Italy, KSA, Japan, Mexico, Russia, South Africa, Thailand, Turkey, UK, USA.
- Tetra Pak Trend Index & Indicators. Based on proprietary Tetra Pak consumer research conducted across the group's four clusters: Americas; Asia Pacific; Europe & Central Asia; Greater Middle East & Africa. The latest data used in this Index is from Q2 2019.

Report references

- 02-1** The Convergence of Health & Environment. See left.
- 05-1** Tetra Pak Environment Research. See left.
- 05-2** Research conducted for Tetra Pak by Whispr Group. Researched time period: 1 January to 31 December, 2018.
- 06-1** 76% for physical and 75% for mental health, versus an average of 67% for both.
- 06-2** 70% for both, versus an average of 59% for "sacrifice convenience" and 60% for "pay more".
- 06-3/4** See 02-1.
- 07-1** See 05-1. Asked who should lead in finding improvements or solutions on environmental issues, respondents selected: the government (57%), food and beverage companies (53%), packaging companies (51%), consumers (36%), local municipalities (18%), retailers (15%) and NGOs (11%).
- 07-2/3** See 05-1.


- 09-1** "Natural": What does it mean to consumers?, Ipsos, April 2018.
- 10-1/3/5** See 05-1.
- 10-2** Tetra Pak Trend Index & Indicators. See left.
- 10-4** 54% of consumers say they look for environmental logos when shopping "always or often", up from 42% in 2017, 39% in 2015 and 37% in 2013. See 05-1.
- 11-1** See 05-1.
- 11-2** European Parliament press release, 27 March 2019.
- 26-1** Market snapshots are based on Cultural Insight Network essays, with the exception of China, which is based on insights from Tetra Pak Asia Pacific.

"At Tetra Pak, we believe that it's no longer enough to think about issues in isolation. That's why we have launched our Planet Positive campaign, which urges industry stakeholders to move to a low-carbon circular economy.

We believe that we must all work together to address the pressing environmental issues of climate and waste, taking a broader view of sustainability, going beyond recycling and reuse to include the carbon impact of raw materials and manufacturing."

Adolfo Orive, President & CEO, Tetra Pak Group



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