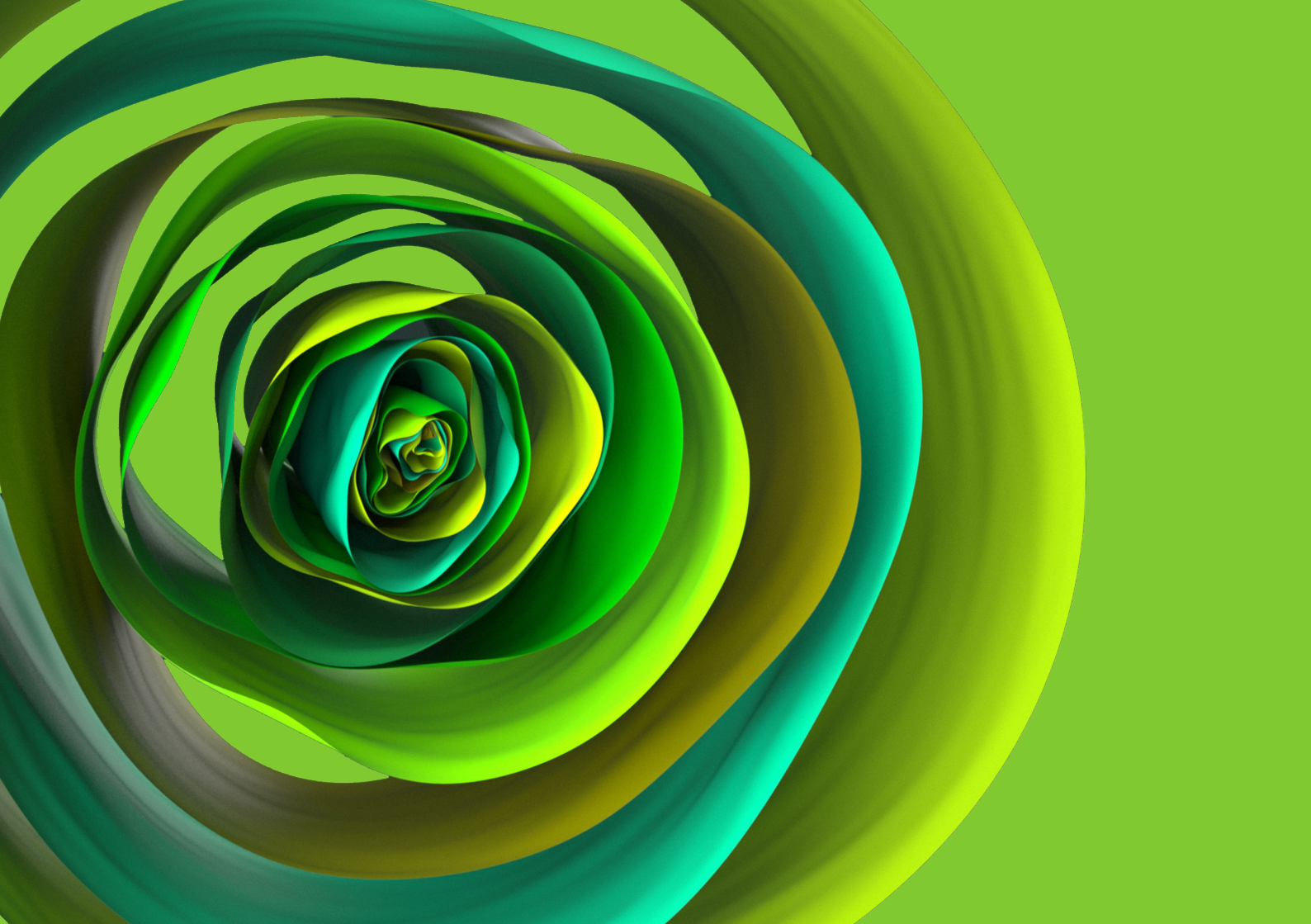


HOW THE FOOD SUPPLEMENT SECTOR IS EMBRACING ENVIRONMENTAL SUSTAINABILITY

www.iadsa.org

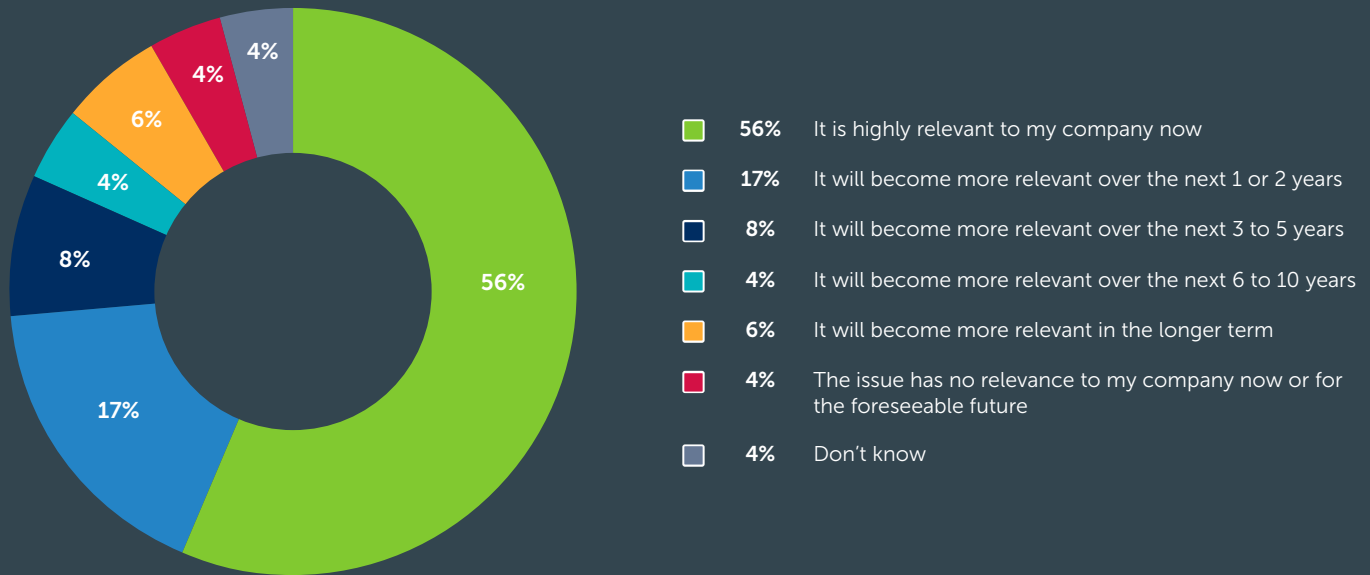
IADSA

International Alliance of Dietary/
Food Supplement Associations



HOW RELEVANT IS ENVIRONMENTAL SUSTAINABILITY?

Over half of the survey respondents say that environmental sustainability is of high relevance to their company now (56%), while 17% say the issue will become more relevant over the next 1 or 2 years and a total of 18% say it will become relevant over the medium to longer-term.



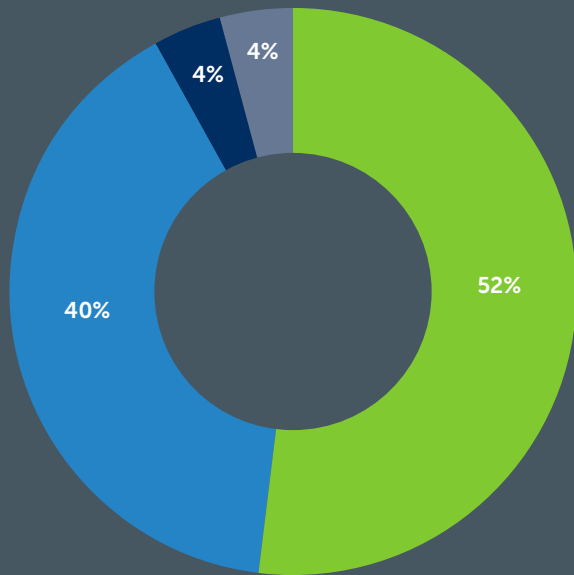
Base: All respondents (N=335).

Question: Q3. "To what extent would you say that the issue of environmental sustainability is relevant to your company?"

HOW IS ENVIRONMENTAL SUSTAINABILITY ADDRESSED IN COMPANIES?

Among all those respondents who indicate that environmental sustainability is, or will be, a priority for their company (or who do not know whether it will be), just over half (52%) say the company gives systematic consideration to the issue in its corporate strategy and day-to-day operations. Meanwhile, 40% say their company considers the issue on more of an ad hoc basis, depending on the issue or decision in question.

More MNCs than SMEs report that environmental sustainability issues are considered systematically within their company (63% vs. 27% respectively), while more SMEs report that the issues are considered on more of an ad hoc basis (57% vs. 32%).



- 52% Systematically – it's a key theme of our corporate strategy and embedded in everything we do
- 40% On more of an ad hoc basis, depending on the issue or decision in question
- 4% It is not something we consider much at all
- 4% Don't know

Base: Respondents who indicate that environmental sustainability is, or will be, a priority for their company, or who don't know (N=315).

Question: Q5. "In what way, if at all, do you consider environmental sustainability issues within your company?"

WHAT DRIVES COMPANIES TO FOCUS ON ENVIRONMENTAL SUSTAINABILITY?

Some differences are apparent in the relative level of importance attached to the various factors by MNCs and SMEs respectively.

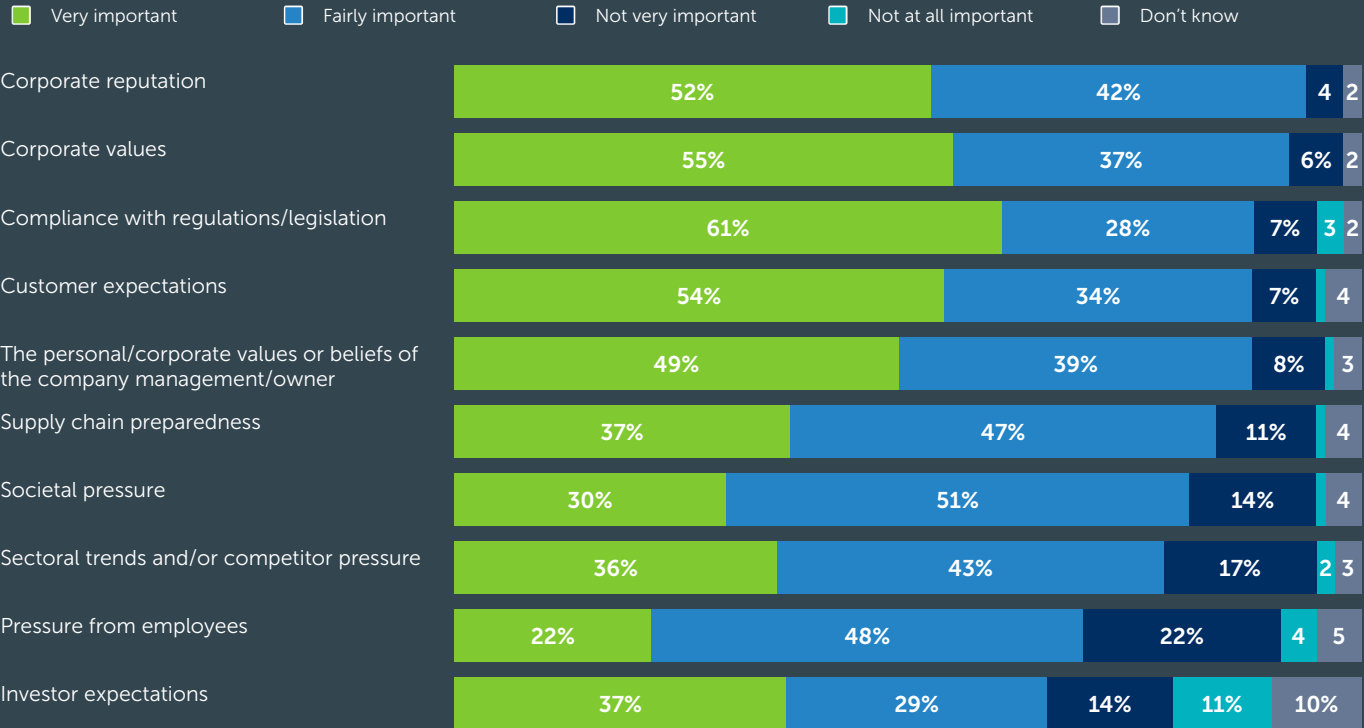
In particular:

MNCs are more likely than SMEs to identify as important:

- investor expectations (74% of MNCs say this is very or fairly important vs. 49% respectively);
- pressure from employees (73% of MNCs say this is very or fairly important vs. 59% respectively).

MNCs are also more likely than SMEs to identify as very important factors:

- compliance with regulations and legislation (67% vs. 49%);
- supply chain preparedness (42% vs. 27%).

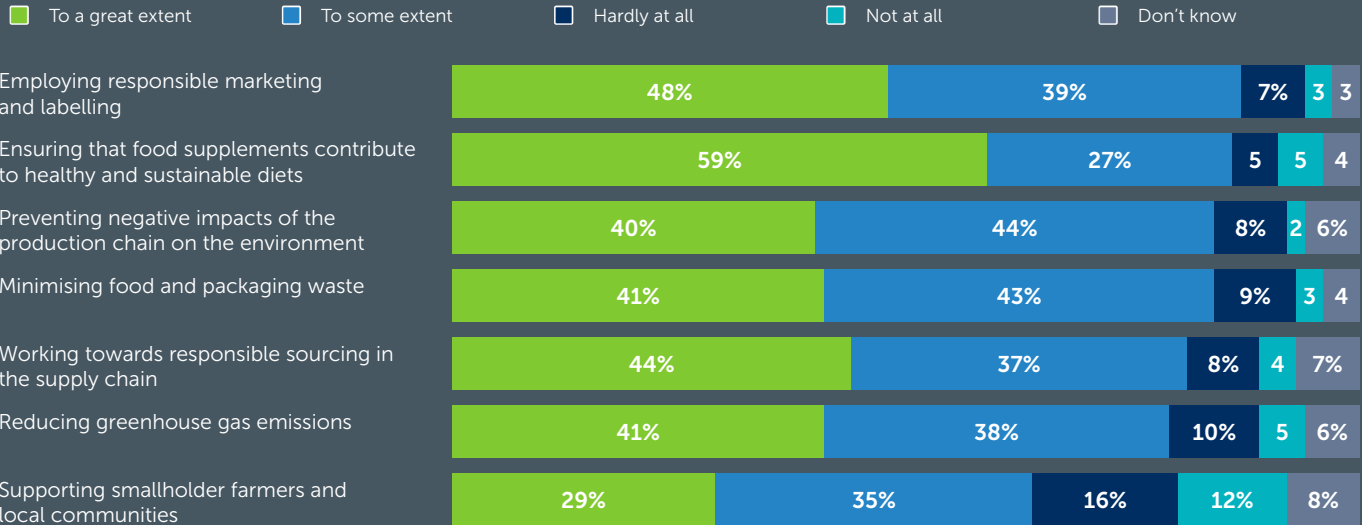


Base: 301 respondents.

Question: Q6. "How important, if at all, have the following been in encouraging a focus on environmental sustainability in your company?"

WHAT IS THE FOCUS OF COMPANIES' SUSTAINABILITY OBJECTIVES?

The majority of respondents indicate that a range of goals are reflected in their company's sustainability objectives. Indeed, more than four in five say the objectives address: employing responsible marketing and labelling (86%); ensuring food supplements contribute to healthy and sustainable diets (86%); preventing negative impacts of the production chain on the environment (84%); minimising food and packaging waste (84%); and working towards responsible sourcing in the supply chain (81%). A somewhat smaller majority say their company's sustainability objectives cover supporting smallholder farmers and local communities (64%).



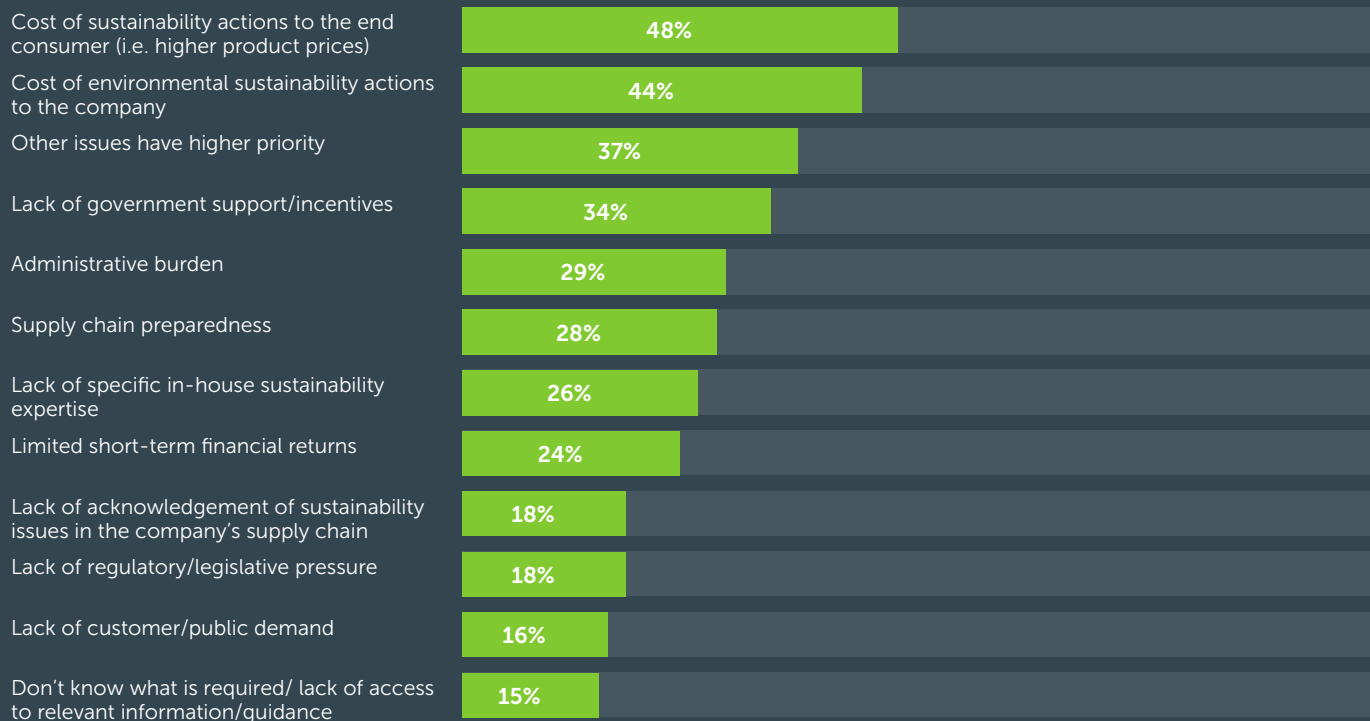
Base: 315 respondents.

Question: Q10. "To what extent are each of the following criteria reflected in your company's sustainability objectives?"

WHAT IS HOLDING COMPANIES BACK FROM FOCUSING MORE ON ENVIRONMENTAL SUSTAINABILITY?

Asked what, if anything, might be holding their company back from focusing, or doing more, on environmental sustainability, respondents commonly mention issues relating to cost or finance. Approaching half mention the cost of sustainability actions to the end consumer (48%), and a similar proportion mention the cost to the company itself (44%). Around a third mention a lack of government support or incentives (34%).

More MNCs than SMEs mention the cost of sustainability actions to the end consumer as a factor holding their business back from focusing, or doing more, on environmental sustainability (55% vs. 37% respectively).

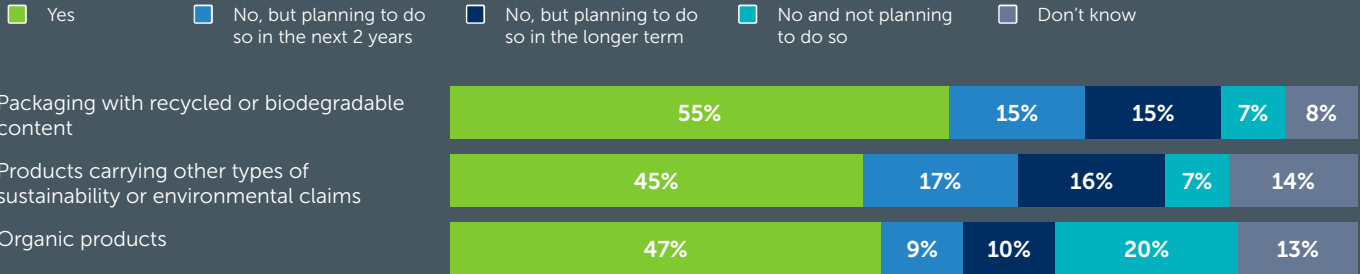


Base: All respondents (N=335).

Question: Q11. "Which of the following, if any, are holding your business back from "focusing on" / "doing more on" environmental sustainability?"

WHAT ARE COMPANIES' PLANS FOR SUSTAINABLE PRODUCTS AND PACKAGING?

Of those respondents who indicate that environmental sustainability is, or will be, a priority for their company (or who don't know), and/or who indicate that their company considers environmental sustainability systematically or more on an ad hoc basis, **7 in 10 say the company offers, or has short-term plans to offer, packaging with recycled or biodegradable content.** A slightly lower majority – around 6 in 10 – say the company offers, or has short-term plans to offer, organic products (56%) or products carrying other types of sustainability or environmental claims (63%).

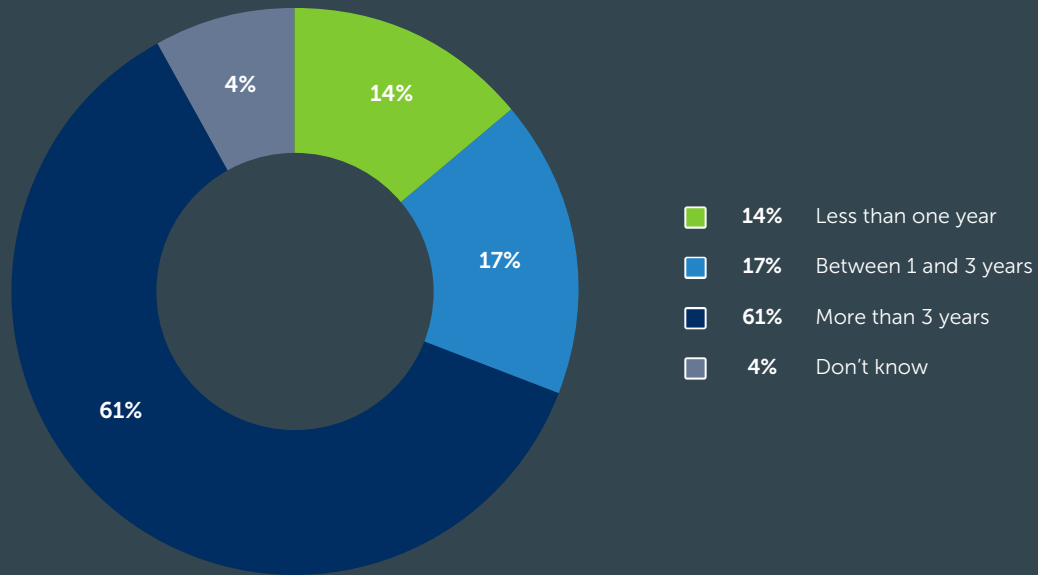


Base: Respondents who indicate that environmental sustainability is, or will be, a priority for their company, or who don't know; and/or who indicate that their company considers environmental sustainability systematically or more on an ad hoc basis (N=315).

Question: Q13. "Does your company offer, or have plans to offer, any of the following?"

HOW LONG HAVE COMPANIES BEEN SELLING ORGANIC PRODUCTS?

Of those respondents whose company currently offers organic products, a majority (61%) indicate that it has been doing so for more than three years, while 17% indicate it has been doing so for between one and three years, and 14% for less than a year. Eight per cent are unsure.



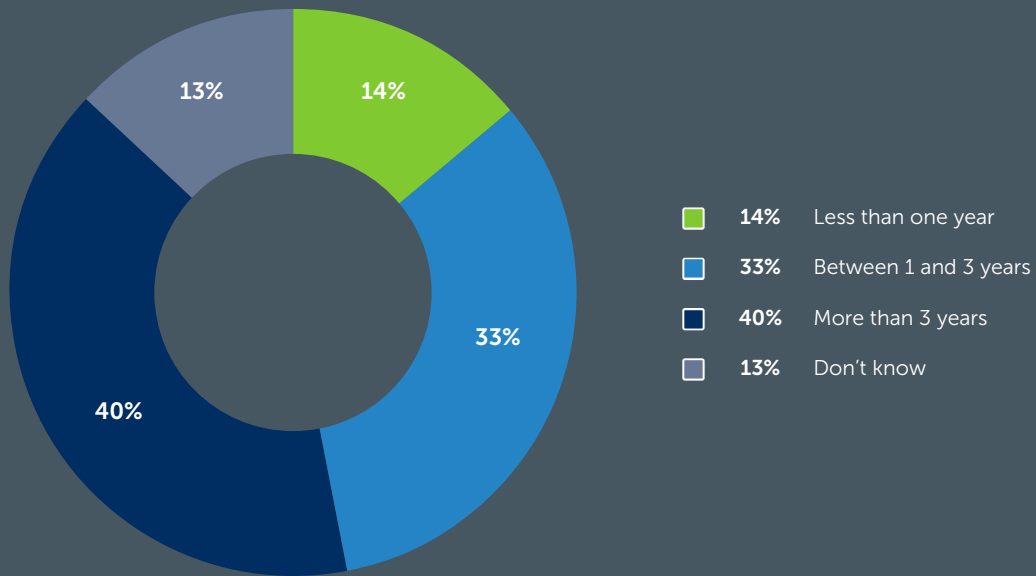
Base: Respondents who indicate that their company currently offers organic products (N=148).

Question: Q15. "For how long has your company been selling organic products?"

HOW LONG HAVE COMPANIES BEEN SELLING PRODUCTS WITH PACKAGING WITH RECYCLED/ BIODEGRADABLE CONTENT?

Of those respondents whose company currently offers packaging with recycled or biodegradable content, approaching half of them (47%) say it has been doing so for three years or less. A slightly smaller proportion – 40% – say it has been doing so for more than three years (21 percentage points fewer than in the case of organic products), while 13% are unsure.

Approaching half of these respondents (48%) indicate that increasing the offer of packaging with recycled or biodegradable content will be a priority for their company within the next 12 months.



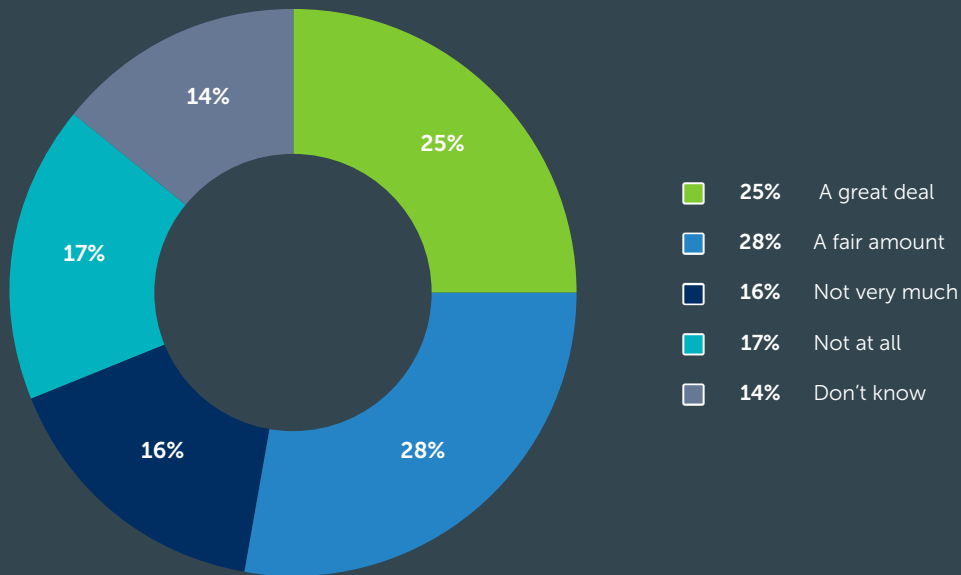
Base: Respondents who indicate that their company currently offers packaging with recycled or biodegradable content (N=174).

Question: Q15b. "For how long has your company been selling products with packaging with recycled/biodegradable content?"

TO WHAT EXTENT DO COMPANIES CONSIDER UN SDGs IN THEIR WORK?

Just over half of respondents (53%) say that their organisation gives a great deal or a fair amount of consideration to UN Sustainable Development Goals (UN SDGs) in its work. Meanwhile, a third (33%) say it gives little or no consideration to the Goals and a further 14% report not knowing whether or not this is the case.

MNCs are almost two times more likely than SMEs to say their organisation gives a great deal or a fair amount of consideration to UN SDGs (61% vs. 35% respectively). Indeed over half of SMEs (52%) say they give little or no consideration to the Goals).



Base: All respondents (N=335).

Question: Q16. "To what extent, if at all, does your organisation give consideration to the United Nations (UN) Sustainable Development Goals (SDGs) in its work?"

WHICH ARE THE MOST COMMON UN SDGS COMPANIES ARE WORKING TOWARDS?

The specific UN SDGs that respondents most commonly say their organisation is working towards are **health and well-being (54% mention this)** and **responsible consumption and production (42%)**. These are followed by decent work and economic growth (32%), zero hunger (30%), climate action (28%) and gender equality (28%) (Figure 6.2). At the other end of the scale, comparatively few respondents say their company is working to help end poverty (6%), reduce inequality (5%) or promote sustainable cities and communities (4%).

■ Total

■ Company size: SMEs <250

■ Company size: Multinational corporations



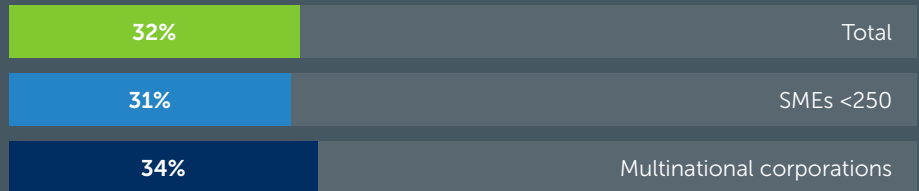
Health and well-being



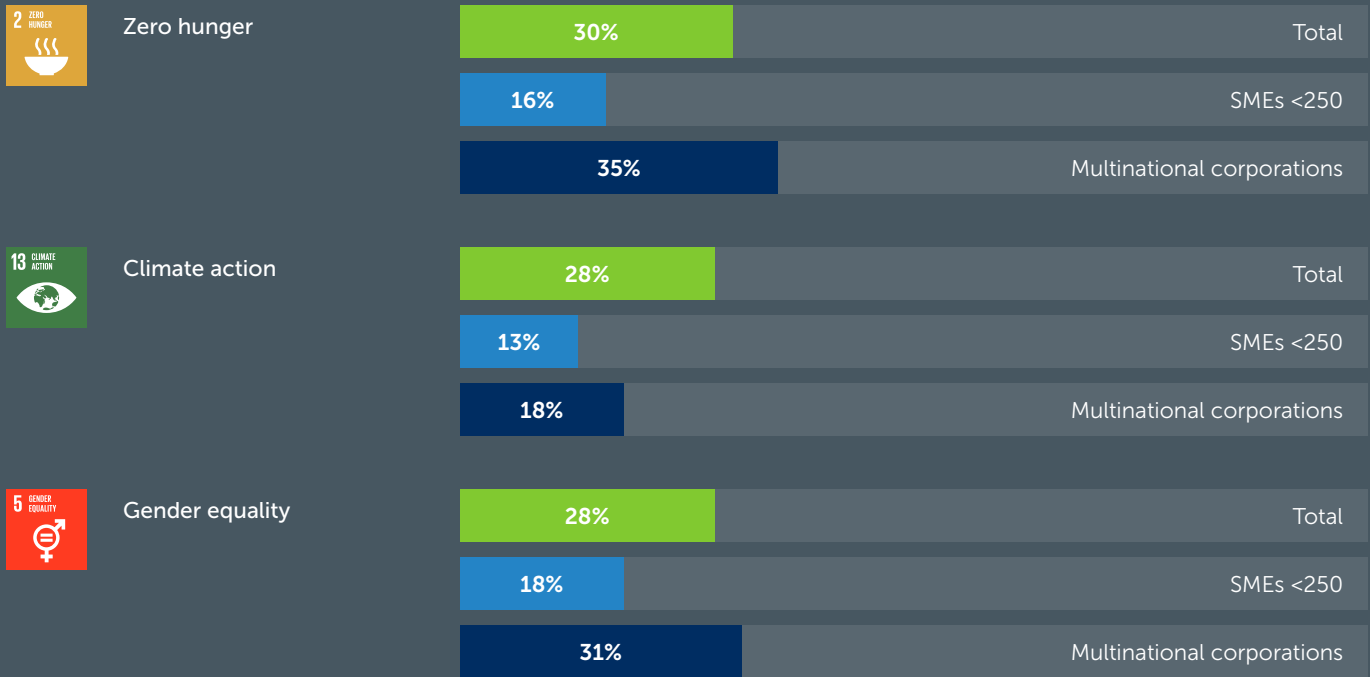
Responsible consumption and production



Decent work and economic growth

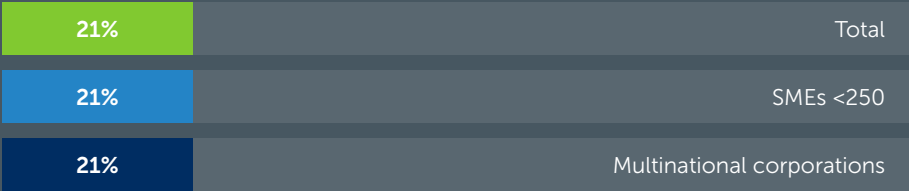


How the food supplement sector is embracing environmental sustainability

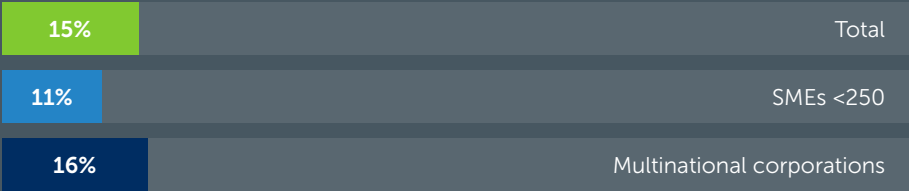




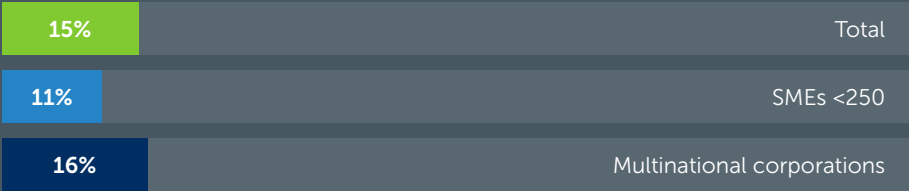
Peace, justice and strong institutions



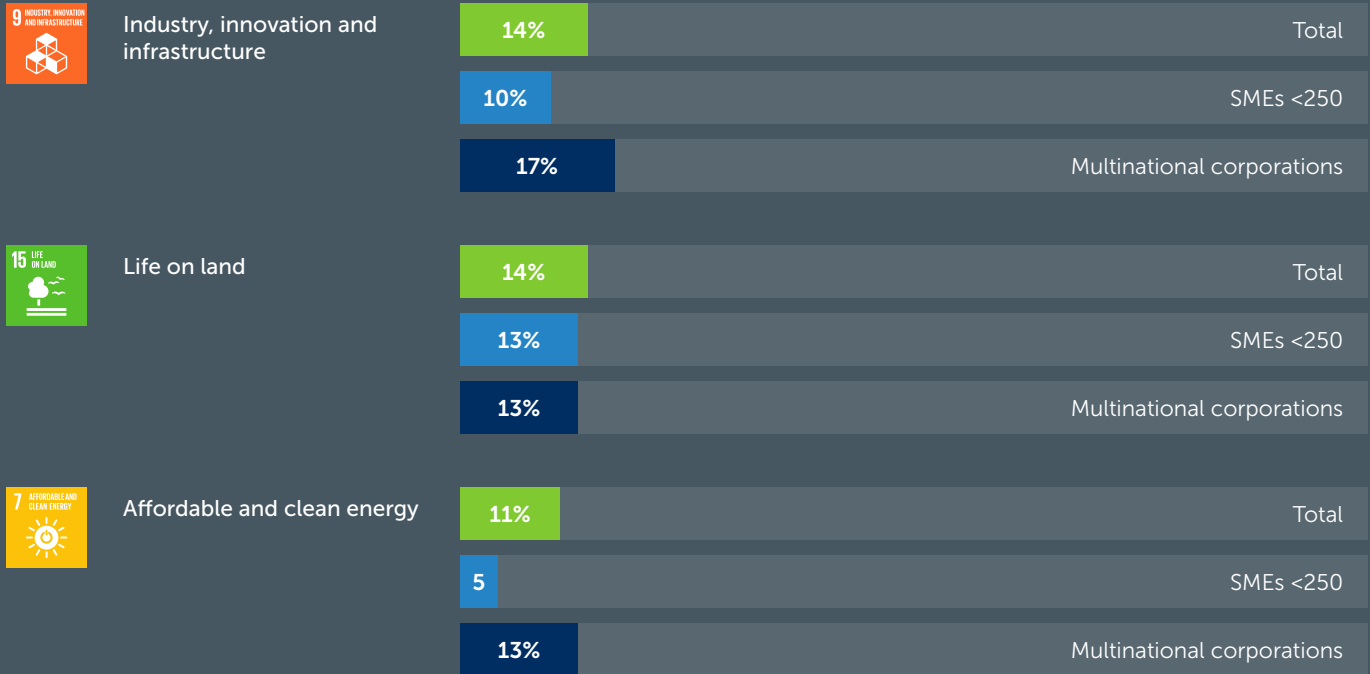
Clean water and sanitation



Quality education

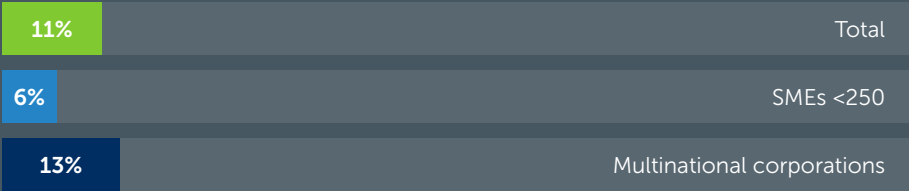


How the food supplement sector is embracing environmental sustainability

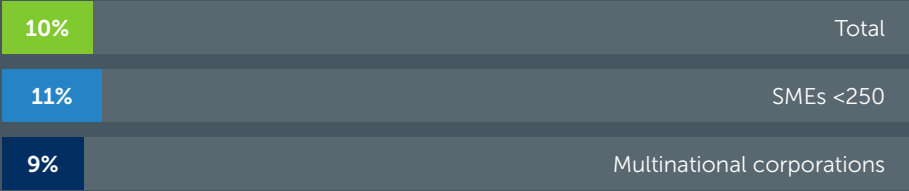




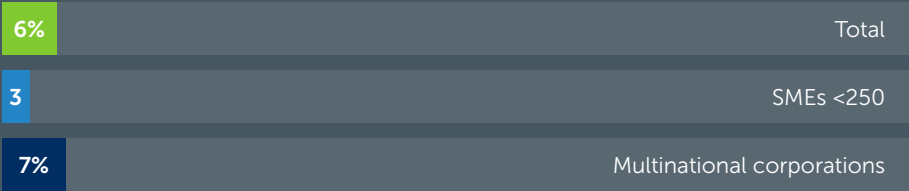
Partnering for the UN SDGs



Life below water



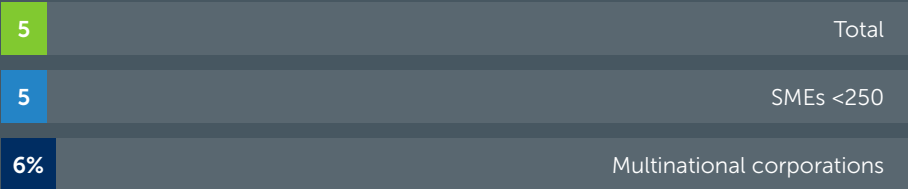
Ending poverty



How the food supplement sector is embracing environmental sustainability



Reduced inequality



Sustainable cities and communities



Base: Respondents whose organisation gives a great deal, or a fair amount, or not very much, consideration to the UN SDGs in its work, or who don't know (N=279).

Question: Q17. "What are the main, if any, UN Sustainable Development Goals that your company is currently working to help achieve (e.g. through specific policies, initiatives, or activities)?"

