

KANTAR

S U S T A I N A B L E
T R A N S F O R M A T I O N





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SUSTAINABILITY SECTOR INDEX 2022

SUSTAINABLE STRATEGIES IN POLAND



A person is lying on their back on a dark, reflective floor, looking up at a large, glowing blue sphere that dominates the upper right portion of the frame. The sphere is covered in intricate, branching patterns, resembling a complex network or a celestial body. The room is dark, with the primary light source being the sphere, which casts a soft glow on the floor and the person's face. The person's reflection is visible on the floor. The overall atmosphere is one of wonder and contemplation.

Origins of the idea

65% of the global economy is **legally committed** to carbon neutrality by 2050.





According to EU directives, already in 2024 over **3 000 companies in Poland** will be obliged to prepare their first ESG report.

Consumers are saying
“call”, which is why
brands need to choose
their sustainable
development goals and
implementation methods
with the **utmost care**

64%

of respondents believe that brands
engage in CSR activities for purely
commercial reasons.

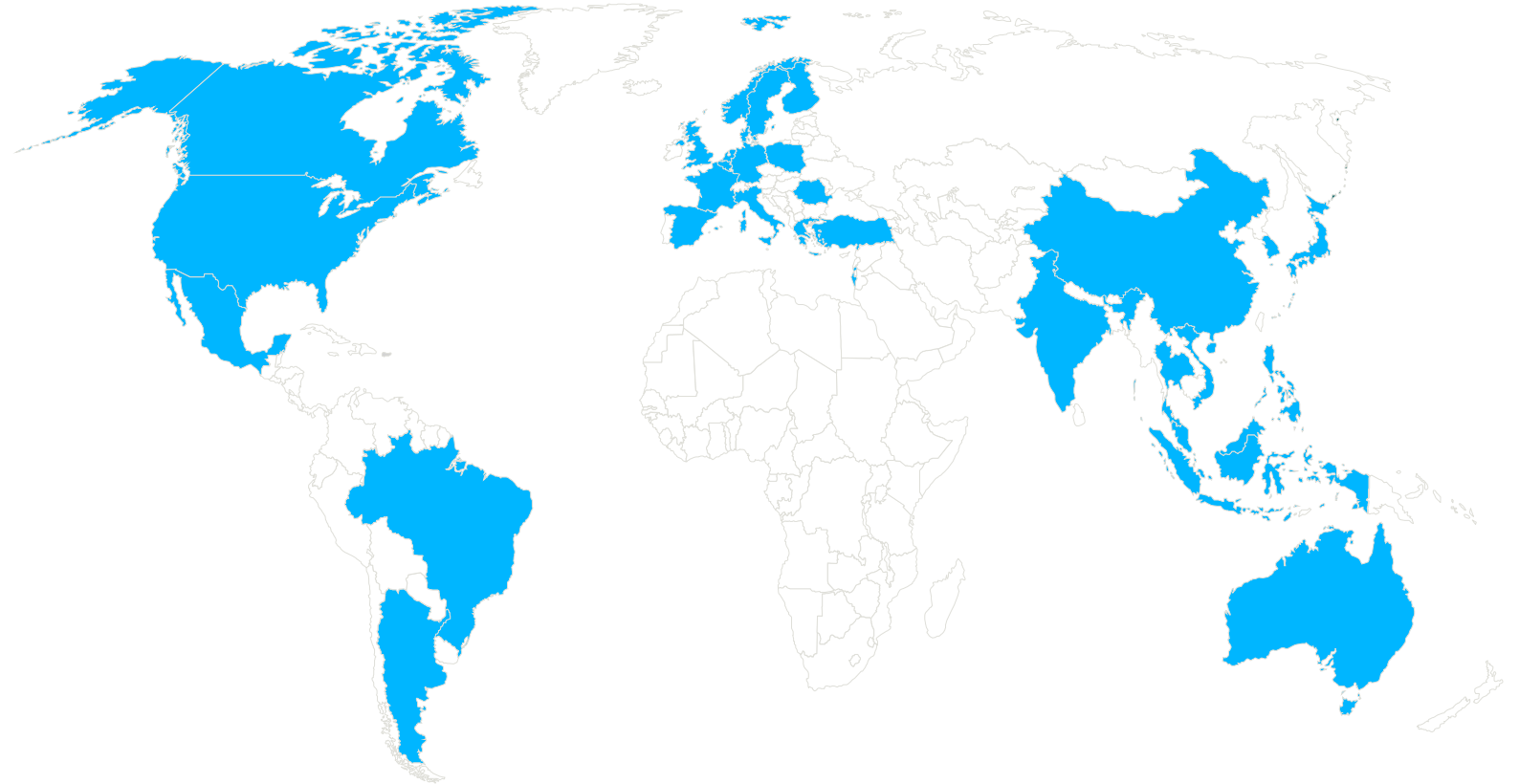


The research areas and analysis are based on the **SDGs by UN.**



Sustainability Sector Index
delivers knowledge on
sustainability within **32 markets**
over the world.

We enable regional as well as
global data comparison.



An aerial photograph of a lush green forest. A winding river flows through the center of the image. A white rectangular frame is superimposed over the forest, enclosing the text. The text is in a bold, white, sans-serif font.

**How do we support you in
building a sustainable
strategy?**

Sustainability Sector Index report:



BURNING PLATFORMS

Ranking (maxdiff), sector analysis

What are consumers' top sustainability issues facing your sector?

How can You build competitive advantage by tackling sustainability issues?

Which areas of the 17 SDGs should you be focusing on to engage consumers?



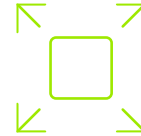
CONSUMERS' ATTITUDES

Current opinions on sustainability

What are consumers already doing – what sustainable actions they take on the daily basis?

What activities would they like to do more often?

What do these new behaviors mean for your company?



VALUE – ACTION GAP

How business can close value action gap analysis

Where are the biggest value-action gaps – the tension between what consumers want to do and what they actually do?

What these new sustainable actions actually mean to Your business?

How can you address these barriers to unlock opportunity for your business?



SUSTAINABLE TARGET

Consumers' segmentation in the context of sustainability

Who should you target with Your strategy?

How and with what messages to succeed?

The Sustainability Sector Index data can be used in many ways - depending on where your business is currently located

The Sustainability Sector Index report is SYNDICATE study – its main part is already available (over 100 slides).

An additional chapter and analysis for your category (and brand) is created after exchanging information with you.

FOR WHO:

FORMAT:

1. Presentation + recommendations



Businesses with a sustainable development strategy already in place/ having prior experience with non-financial reporting.

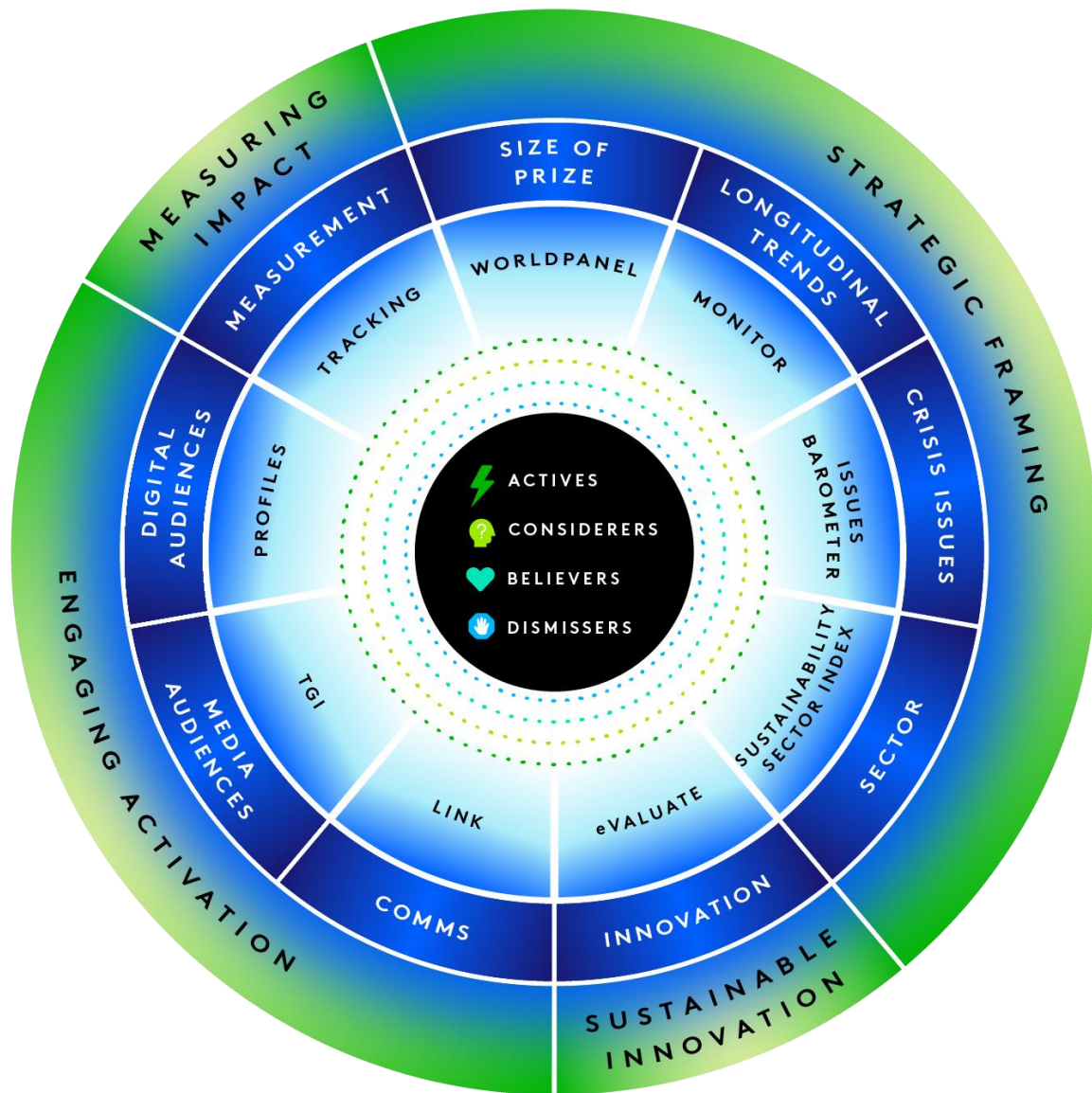
- presentation and a discussion
- after the session you will receive a dedicated report along with recommendations

2. Workshops + recommendations



Businesses that want to created or modify/ validate their strategy, e.g. with more stakeholders involved in the process.

- workshop with a presentation and agenda tailored to the Client's context
- after the workshop you will receive a summary and a dedicated report along with recommendations



Sustainability Sector Index is one of the **Kantar's portfolio positions focused on sustainability – our ecosystem** supporting Clients on the Sustainable Transformation path.



**Who trusted our
expertise so far?**

Already worked with Sustainability Sector Index globally:



We have assisted with sustainable strategies in numerous sectors in Poland.

The Sustainability Sector Index report is a highly **up-to-date, comprehensive, and useful document** that allows to identify areas connected with the sustainable development goals we need to focus on as a bank in order to engage both current and potential Customers.

The **listing of gaps** between values and actual activities is a very interesting aspect.

Magdalena Chojnowska,
Research and Customer Insight
Team Head,
BNP Paribas Bank Polska S.A.



BNP PARIBAS

We have assisted with sustainable strategies in numerous sectors in Poland.

This report is a source of knowledge on **whether and how consumers understand sustainable development** and what they expect from businesses in this area.

It is also a **signpost for defining goals** and building a comprehensible communication to talk about difficult issue..

Daria Sulgostowska,
Deputy Director of External
Relations & ESG,
CCC S.A.



We have assisted with sustainable strategies in numerous sectors in Poland.

Businesses active in various areas of sustainable development will **find this report particularly valuable**, because it lists all those areas in one place and helps to understand which of them are crucially important to consumers.

It provides invaluable help in defining priorities but, importantly, achieves this relying on **consumer expectations with regard to the categories** in which businesses operate.

Urszula Kuczwalska,
Senior Strategy & Insights Team
Manager,
DANONE Companies Group



We have assisted with sustainable strategies in numerous sectors in Poland.

Findings from last year's wave of the Kantar Sustainability Sector Index study have confirmed that Polish consumers are becoming increasingly conscious about their purchase decisions.

This presents a challenge both for us, as a businesses, and for our clients – entrepreneurs running local stores throughout the country!

For the Eurocash Group, Kantar's report is **a valuable source of the latest reliable data** on consumer habits and trends. I have also come to highly appreciate other aspects of our cooperation with Kantar: e.g. by publishing the "In your sustainable store" e-guide together we helped entrepreneurs understand various aspects of sustainable development.

As the Eurocash Group, we also provided our customers with extensive education on the subject – close to 4000 people participated in activities organised by our Eurocash Academy of Skill.

This was our shared successes.

I'm looking forward to fruitful cooperation in the years to come!

Katarzyna Kopaczewska
Board Member,
Eurocash Group



We have assisted with sustainable strategies in numerous sectors in Poland.

Kantar's report was **immensely helpful to us in a discussion** concerning our regional sustainable development strategy.

The aspect that we found particularly valuable was the opportunity to compare the situation on the individual markets with an in-depth look at the demographic cohort level.

Adopting our 2030 sustainable development agenda as a framework for the entire project gave us the **sense of having a holistic and extensive (but also structured) approach** to the issue.

Agata Czapkowska,
Senior Business Partner, CEE
Consumer Market Insight,
Nestle



An aerial photograph of a roundabout with a central green island. A car is visible on the road. The text "Terms & conditions of cooperation" is overlaid on the central island.

Terms & conditions of cooperation

Pricing offer

What follows is the offer for the base Sustainability Sector Index 2022 packages. All prices include a report, data, and recommendations for one of 38 market categories (list of all available in the annex).

Should you be interested in purchasing the Sustainability Sector Index report for several categories or for markets other than Poland, we will happily provide a custom offer.

Presentation + recommendations



Diagnosis of initial situation.
Presentation and discussion.
Dedicated Sustainability Sector Index 2022 report prepared after the meeting.
ESG (ES) activity recommendations.

27 000 PLN

Workshops + recommendations



Diagnosis of initial situation.
One-day workshop with the company's key stakeholders..
Dedicated Sustainability Sector Index 2022 report prepared after the meeting.
ESG (ES) activity recommendations, taking into account needs of all stakeholders participating in the workshops..

33 600 – 38 000 PLN*

Let's talk!



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A hand is shown holding several bright, glowing particles. The background is a dark, textured green. A white rectangular frame is positioned around the text. The overall image has a futuristic or scientific feel.

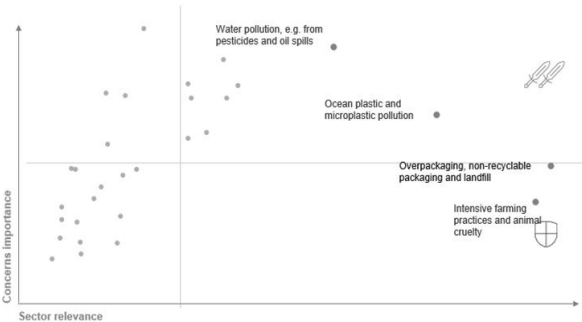
Annex

(auxiliary information)

Examples of data visualizations in the report:

1. What matters to consumers in your category?

Deep dive: Example Sector



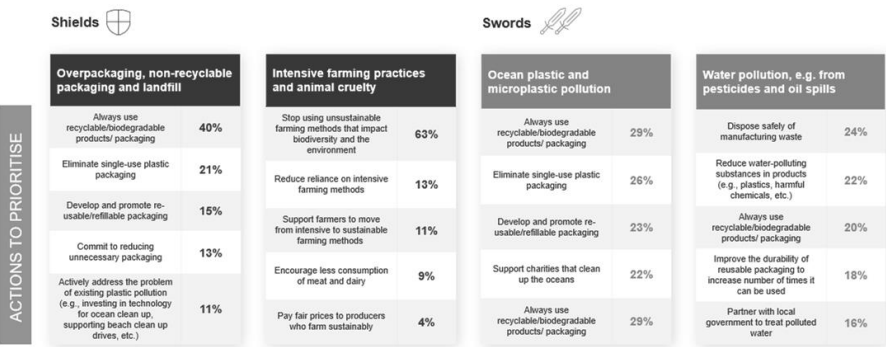
Swords

MOST RELEVANT CONCERNS	ASSOCIATED SDGS
Ocean plastic and microplastic pollution	Life below water
Water pollution, e.g. from pesticides and oil spills	Clean water and sanitation

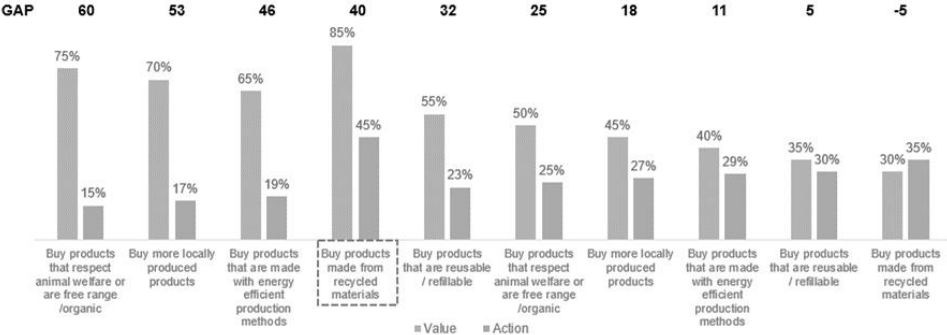
Shields

MOST RELEVANT CONCERNS	ASSOCIATED SDGS
Overpackaging, non-recyclable packaging and landfill	Responsible consumption and production
Intensive farming practices and animal cruelty	Life on land

2. How to address these needs?



3. Consumer behaviour – what is it, what can it become?



4. How can businesses remove consumer tensions?



Sustainability Sector Index covers 38 industry categories:

Chocolate and sweets	FOOD, BEVERAGES & REALTED PRODUCTS	
Packaged biscuits, chips and snacks		
Fresh Fruit and vegetables		
Meat product		
Milk & Dairy products		
Coffee and tea		
Flavoured beverages (e.g. soft drinks, juices, etc.)		
Packaged water (e.g. still, sparkling)		
Beer and alcoholic beverages		
Tobacco or manufactured cigarettes, vaping, electronic cigarettes (e-cigs)		
Baby food	BEAUTY, HEALTH & HYGIENE	
Pet food		
Cleaning products		
Laundry detergents/soaps/tablets		
Baby products (e.g. diapers, etc.)		
Cosmetics (e.g. make-up, etc.)		
Hygiene products (e.g. adult diapers, toilet paper, etc.)		
Personal Care (e.g. toothpaste, soap, etc.)		
Healthcare/ pharmaceutical products / Medicine or medical supplies		

Fast food/casual restaurants	LEISURE/ LIFESTYLE	
Clothing and shoes		
Fashion		
Furniture / home furnishing		
Luxury, products (e.g. Haute couture, luxury cars, boats, luxury jewellery)	RETAIL	
Online shopping sites (e.g. Amazon, eBay)		
Retailers of electronics and electrical appliances		
Supermarkets/hypermarkets/department stores	NEW TECHNOLOGIES/ APPLIANCES	
Appliances (e.g. TVs, Fridge, vacuum cleaners, hairdryers, room heaters etc)		
Electronic Devices (e.g. Computers/Laptops/Phones/..)		
In-home entertainment (e.g. TV/Music streaming, voice assistants, video games, etc.)		
Online technology / social media (e.g. Google, Microsoft, Facebook etc)	SERVICES & OTHER	
Telecom service providers (fixed line, internet, mobile)		
Financial services, banking, and insurance		
Households utilities (e.g. electricity/water/gas etc.)		
Airlines		
Travel and hospitality (e.g. travel, hotels, B&B, etc.)		
Motor vehicles and related products/ services (e.g. cars, motorbikes, etc.)		
Oil and gas (including petrol / diesel)		

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