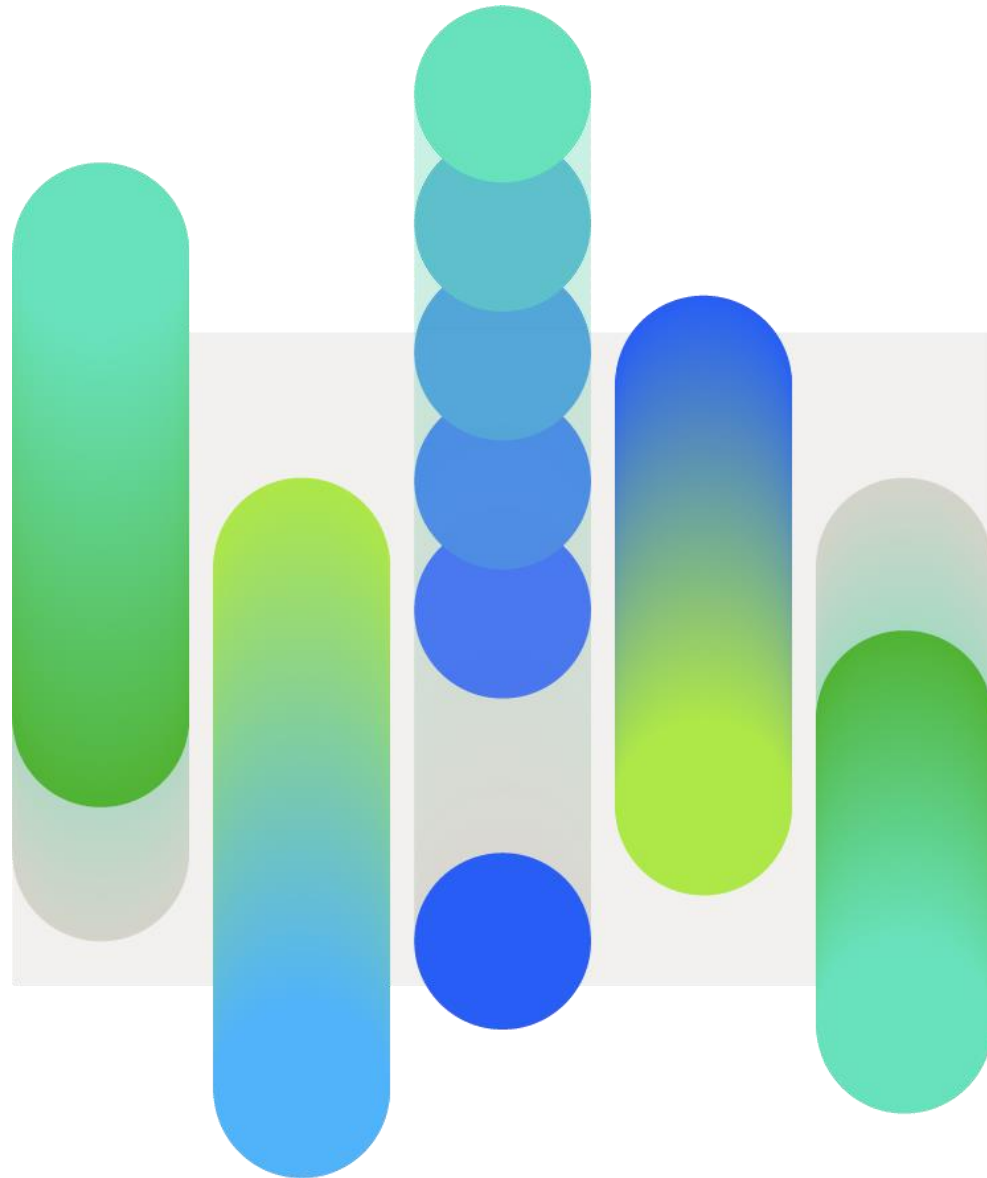




SUSTAINABILITY **SECTOR INDEX**

Belgium report - Extract
2025 Edition

Corinne.Mostaert@kantarc.com



Brands grow by being meaningfully different to more people.

Sustainability is reshaping consumer demand in every sector and influences people's attitudes towards your brand. Your brand perceptions on sustainability will either **inspire or inhibit your brand growth** and as such should not be ignored.

How do you **find your path to building meaningful difference** in this space? **Navigating to people's view of your sector to define where and how to play** is critical.

The **Sustainability Sector Index (SSI)** empowers you to build the foundation of your brand sustainability strategy and activation plan in a consumer-relevant way – by **identifying what really matters to consumers, how they behave and how they currently perceive your sector**. In this short deck we are sharing with UBA members an important sectorial data about how your sector is doing : the **sustainability sector index**. For more information, please contact corinne.mostaert@kantar.com



SSI helps build a winning Sustainable Marketing strategy

Opportunities differ on a sector basis, and you will need to think about where and how your brand can credibly play. SSI enables you to unlock consumer engagement and reap commercial rewards by putting your consumers' environmental and social demands at the heart of your plan for growth while also connecting your strategy with the UN's Sustainable Development Goals (SDGs).

It will help you...

Answering five big questions, Kantar's **Global Sustainability Sector Index** will point to the most effective direction for your brand in your sector

1

How do sustainability issues impact people?

What people care about and act upon is strongly linked to where they are in the world. We explore how sustainability connects and impacts people's lives overall and in connection to the 17 SDGs.

2

What issues most affect your sector?

Identify and prioritise the most relevant concerns for your brand. We look at issues directly associated with your sector and how that compares to the issues people are most concerned about in general and in their own country.

3

How well is your sector meeting people expectations?

View how your sector is perceived against critical sustainability territories like climate change as well as key marketing pillars like strategy, innovation, activation, impact and social / greenwashing to further inform your action plans.

4

What are the related sustainable behaviours?

Uncover the behaviour dynamics at play in your category, the level of Value-Action gap and the most tangible barriers to adoption of sustainable offering in your category.

5

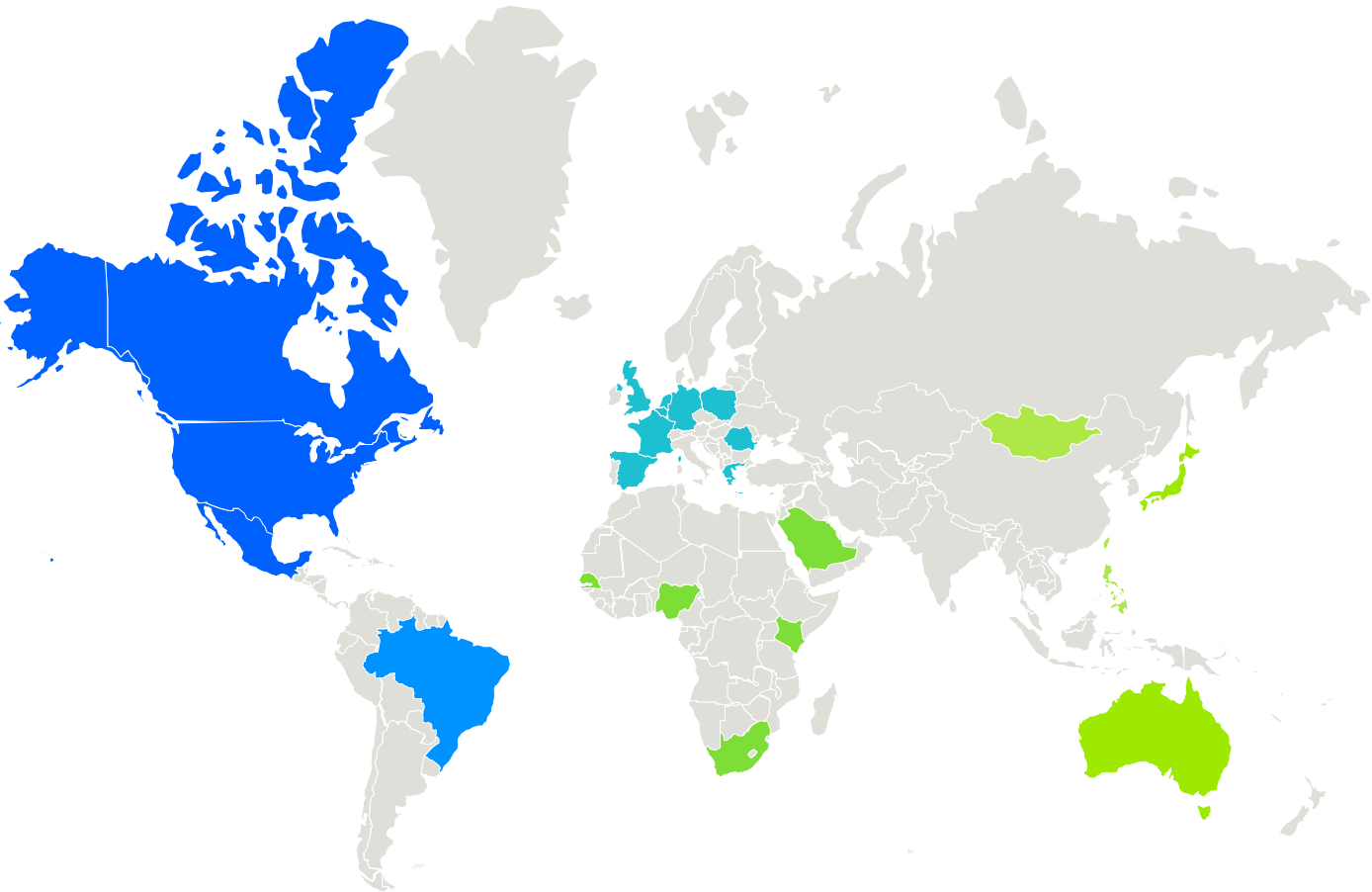
How to hit the right messaging and audiences?

Find out about the different target audiences to engage and how to reach them with the right degree of message sophistication.

We've built an eco-system of global knowledge to support global and local sustainability strategies

In 2025, SSI offers a consistent foundational understanding of sustainability across 22 countries around the globe.

- United States*
Mexico
Canada
- Brazil
- Belgium
France
Germany
Greece
Netherlands
Poland
Romania
Spain
United Kingdom
- Saudi Arabia
Kenya
Nigeria
South Africa
Senegal
- Japan
Philippines
Mongolia
Taiwan



SAMPLE: 1000 interviews per country (*2000 in the USA)
WHO: Nationally Representative Sample (Males and females, age 18+) ** MEA Digital representative
WHEN: Fieldwork in October 2024

In 2025, we cover 42 sectors

Beer, wine and alcoholic beverages	Alcohol
Financial services, banking, and insurance	Financial Services
Confectionery (Chocolate, sweets, etc.) UPDATED	Food & Beverages
Coffee UPDATED	Food & Beverages
Fast food/casual restaurants	Food & Beverages
Flavoured beverages	Food & Beverages
Bottled water	Food & Beverages
Packaged biscuits, packaged cakes UPDATED	Food & Beverages
Crisps, savoury snacks UPDATED	Food & Beverages
Milk, cream, butter, yogurts, cheese NEW	Food & Beverages
Dried pasta, rice, noodles, couscous, etc. NEW	Food & Beverages
Ready meals NEW	Food & Beverages
Bread and bakery products NEW	Food & Beverages
Pet food	Pet Food
Over-the-counter medicine, pharmaceutical products UPDATED	Health
Cleaning and home care products	Household cleaning
Laundry, washing detergent and fabric care	Household cleaning
Oil and gas (including petrol / diesel)	Oil and Gas
Energy providers	Home
DIY and Home improvement stores and products NEW	Home
Property to buy or build	Home

Cars UPDATED	Mobility
Tyres NEW	Mobility
Travel (airlines, railways, cruise lines, etc.) UPDATED	Mobility
Cosmetics make-up	Personal Care
Skin care	Personal Care
Personal Care (e.g. oral hygiene, shampoo, etc.)	Personal Care
Online shopping sites	Retail
Drugstores NEW	Retail
Supermarkets/hypermarkets/department stores	Retail
Delivery services (post, parcel, food, etc.) NEW	Service
Hospitality (hotels, accommodations, etc.) UPDATED	Service
Out of home entertainment (e.g. theatres, amusement parks) NEW	Service
Big technology companies (e.g. Google, Microsoft, Facebook, Amazon, Nvidia, etc.) NEW	Tech, Media
News media (e.g. newspapers, magazines, television, radio, social media) NEW	Tech, Media
Electronics devices (smartphones, TVs, computers, cameras, etc.) UPDATED	Tech, Media
Large household appliances such as refrigerators, washing machines, etc. UPDATED	Tech, Media
In-home entertainment	Tech, Media
Telecom service providers (fixed line, internet, mobile)	Tech, Media
AI Tools NEW	Tech, Media
Clothing and footwear	Fashion
Luxury products	Fashion

HOW WELL IS YOUR SECTOR DOING?

- SUSTAINABILITY SECTOR INDEX



SUSTAINABILITY SECTOR INDEX

To understand how brands are doing on sustainability across sectors, we diagnose consumer perceptions of performance through the lens of four key marketing dimensions: **Strategy, Innovation, Activation, and Impact.**

There are 6 indicators across these dimensions used to calculate the score for the overarching index. Perceptions of sectors have been collected on polarising 7pt scales – from negative impact to positive impact.

Using average scores, indexed vs. all other sectors average we calculate the Sustainability Sector Index. Consequently, the Index reflects a sector's performance relative to other sectors. It goes from -100 for the sector with the lowest perception to 100 for the sector with the highest perception. When the index is negative, the sector has more negative perceptions than positive. A positive index means the sector has more positive perceptions than negative.

STRATEGY

Don't care Vs.
Take responsibility for
addressing environmental
and social issues

ACTIVATION

- **Don't do a good job** vs.
Do a good job of representing
people similar to me or
my community
- **No Idea** vs **Know clearly** how I
contribute to positive change
when I buy brands in this sector

INNOVATION

- **Worsen or ignore** Vs.
**propose meaningful
solutions** to the
environmental issues we face
- **Worsen or ignore** Vs.
**propose meaningful
solutions** to the social issues
we face

IMPACT

Hide the truth Vs.
offer real transparency on their
sustainability performance

SUSTAINABILITY SECTOR INDEX

We ranked 42 sectors based on people's perceptions of the degree to which they drive progress on environmental and social issues.

How to interpret your sector rank?

The top 10 of the ranking...

- Foundation to lead the transformation, look for shared value creation opportunities
- Often a case of unlocking further adoption with efforts on activation and differentiation

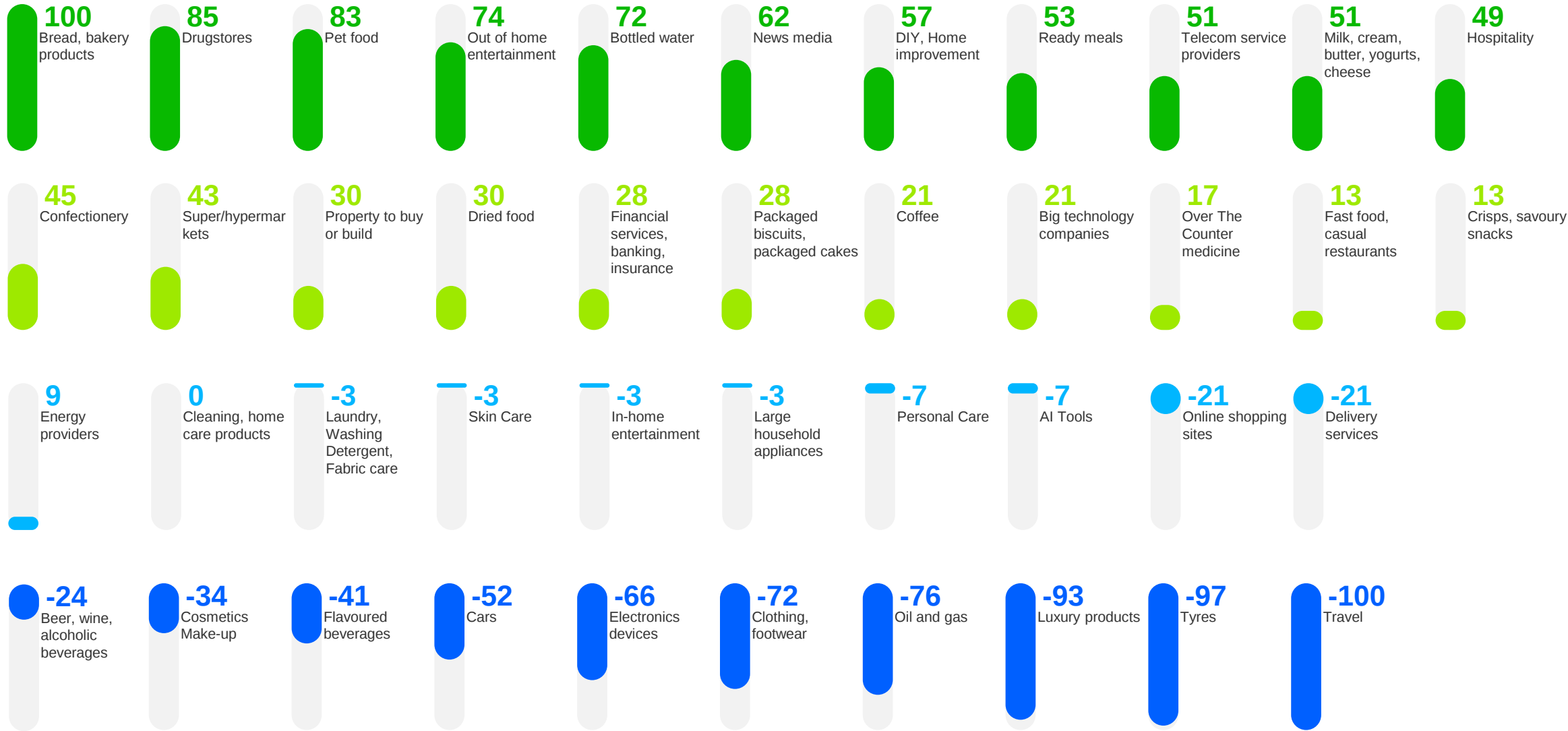
The middle of the ranking...

- Focus on building a more meaningful connection to sustainability
- Opportunity to disrupt and stand out of the pack; identify your sector strengths and weaknesses to find your priority levers

The bottom 10 of the ranking...

- Inherent issues attached to your sector, work on your shields focusing on sector issues
- Look for stretch opportunities and/or radical innovation

SUSTAINABILITY SECTOR INDEX RANKING





SUSTAINABILITY **SECTOR INDEX**

Belgium report - Extract
2025 Edition

Corinne.Mostaert@kantarc.com

