



# The Packer's Sustainability Survey

## Key Grower Insights

*September 2021*



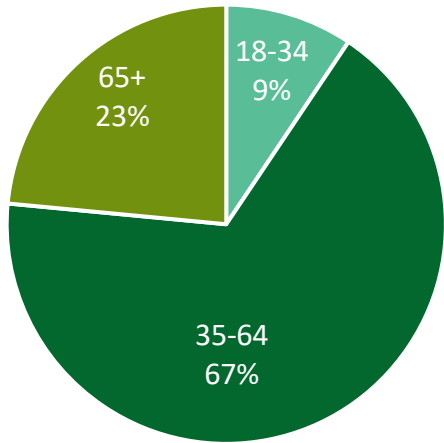
# Key Learnings

- **The top 3 things growers associate with sustainability is Natural resource stewardship (58%); Being able to pass the farm on to another generation (58%); and Essential for long term viability (60%)**
  - This paints a clear picture that growers are future-focused and environmental focused
- **Only 29% of growers said they implement sustainability because it is a priority for their customers; meanwhile 41% of consumers said that sustainability is a primary purchasing concern and 20% said it was a secondary concern**
  - This points to a potential gap between end user priorities and grower understanding of consumer demand
- **Growers overwhelmingly trust other growers more than any other source of information related to sustainability**
  - This points to the importance of engaging growers as champions to support change activities

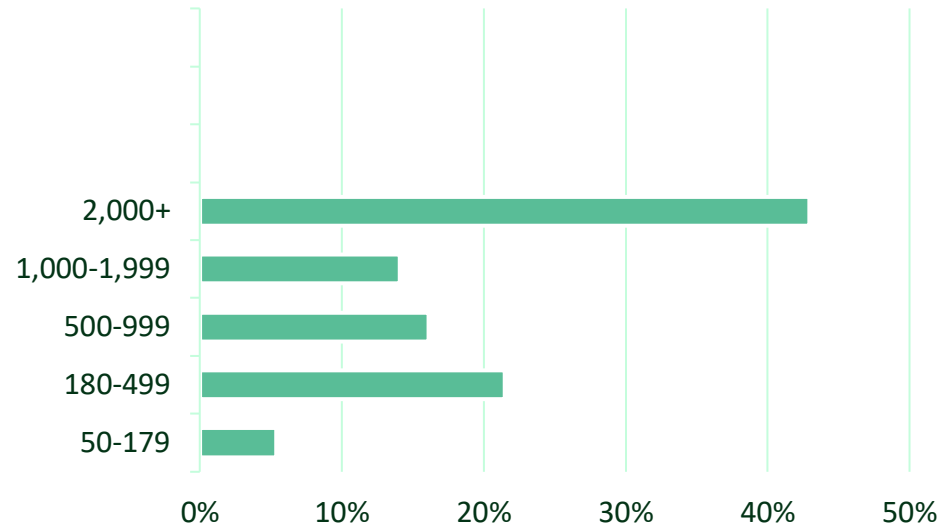


# Demographics

### Age

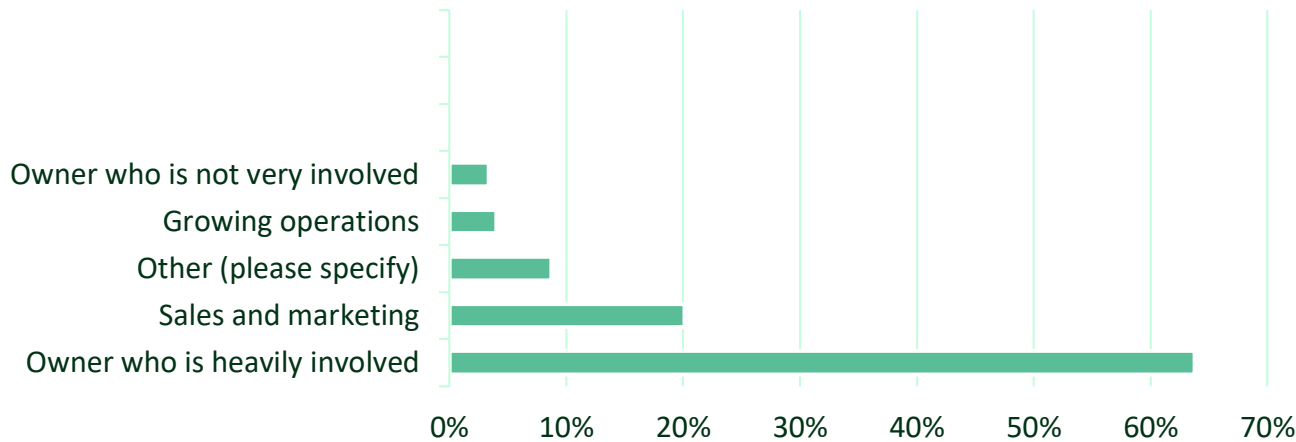


### Acreage



- *What is your age? (n=149)*
- *How many acres do you farm? (n=149)*
- *How would you describe your role in the operation? (n=149)*

### Role in operation



#### Other included responses such as:

- Crop pest control and consulting
- VP Food Safety, Safety & Sustainability
- Operations and marketing
- Packaging Manager



# Geography



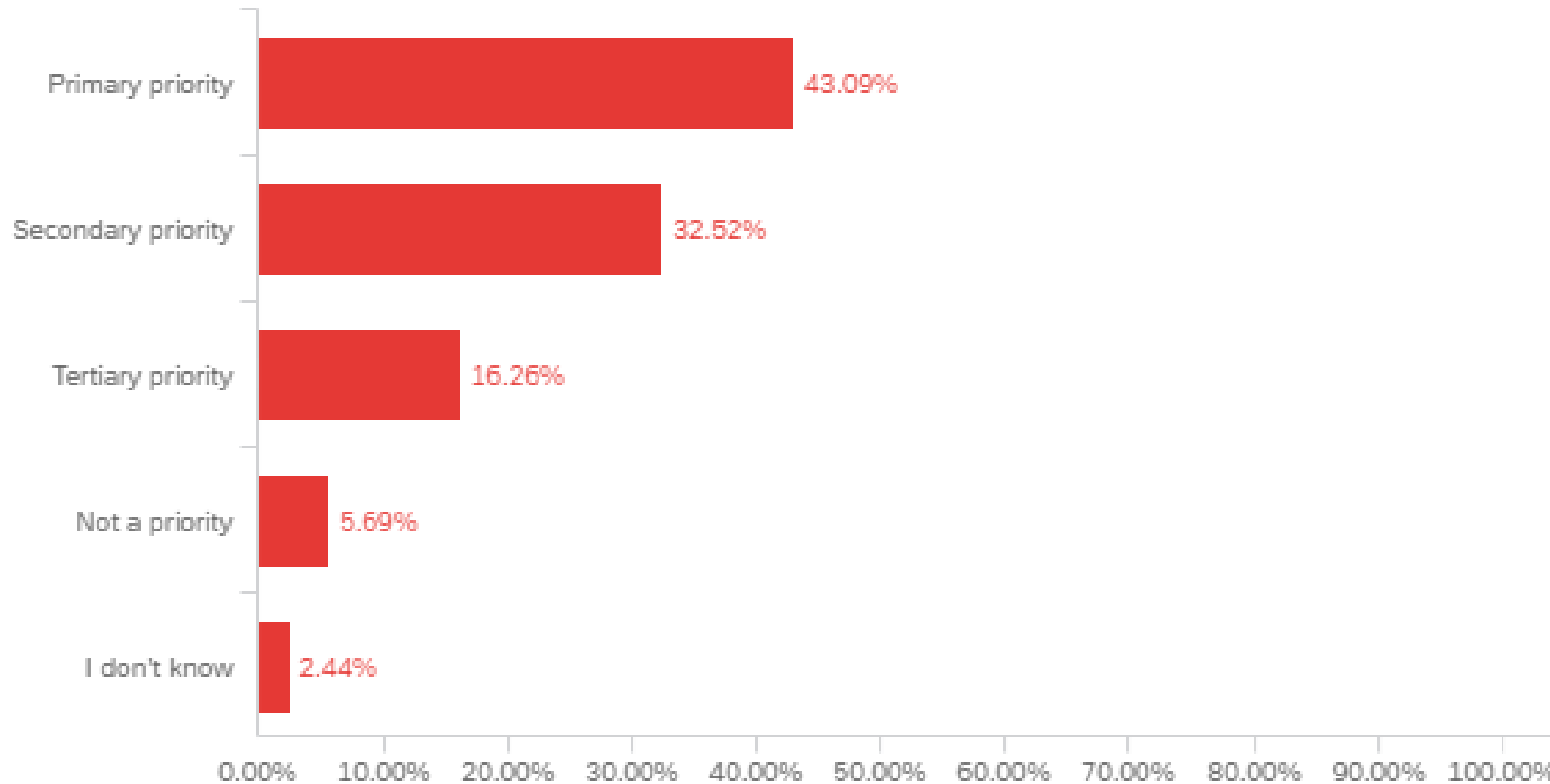
This study includes participants from 34 states

*What state is the majority of your operation in? (n=136)*



# How high of a priority is sustainability in your strategy and financial decisions as a business? (n=123)

Three quarters of respondents claim it is top 2

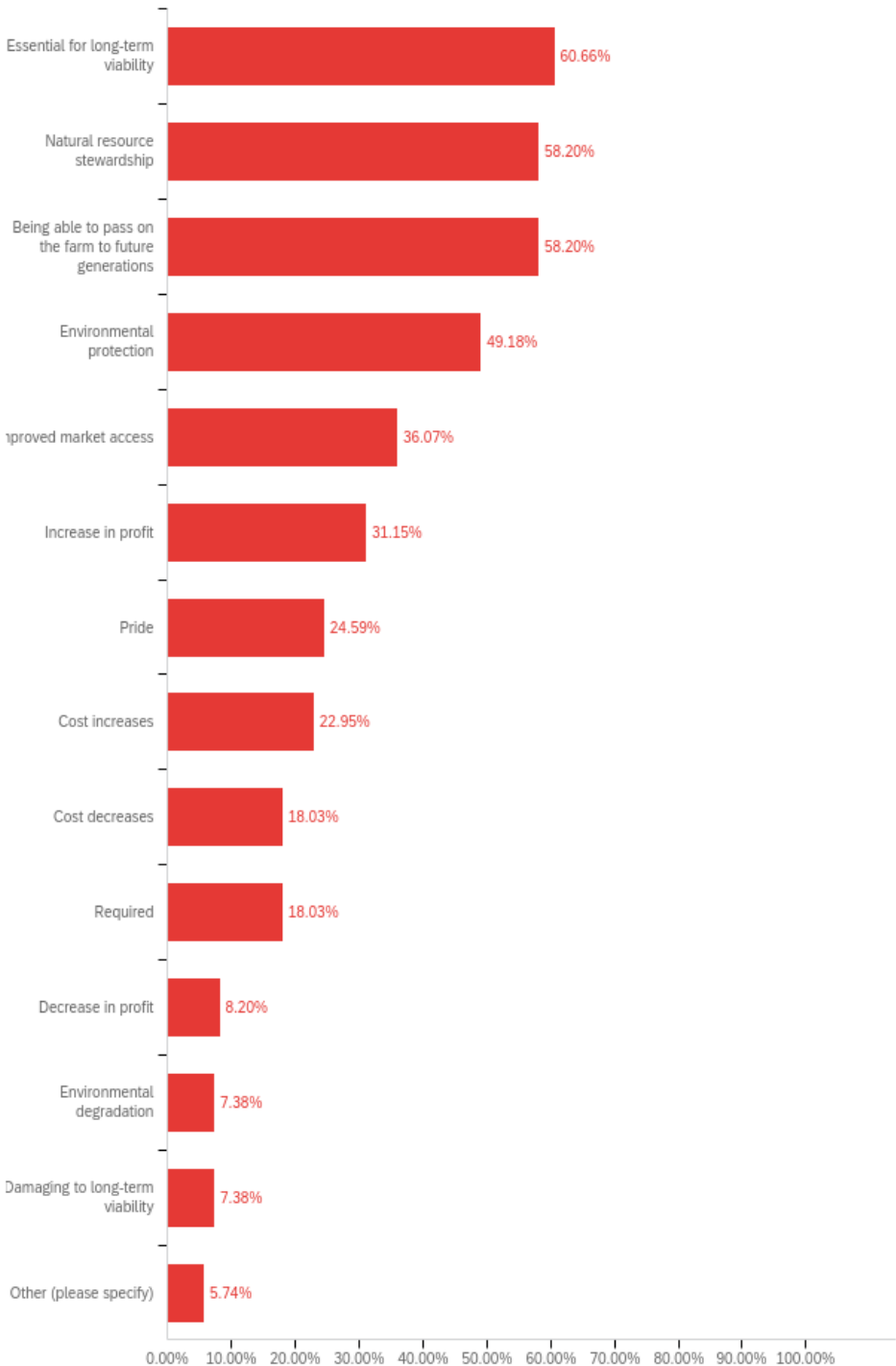




# What does sustainability mean to you and your farming operation? (select all that apply) - (n=122)

**Significant alignment on sustainability meaning environmental stewardship and long-term business viability**

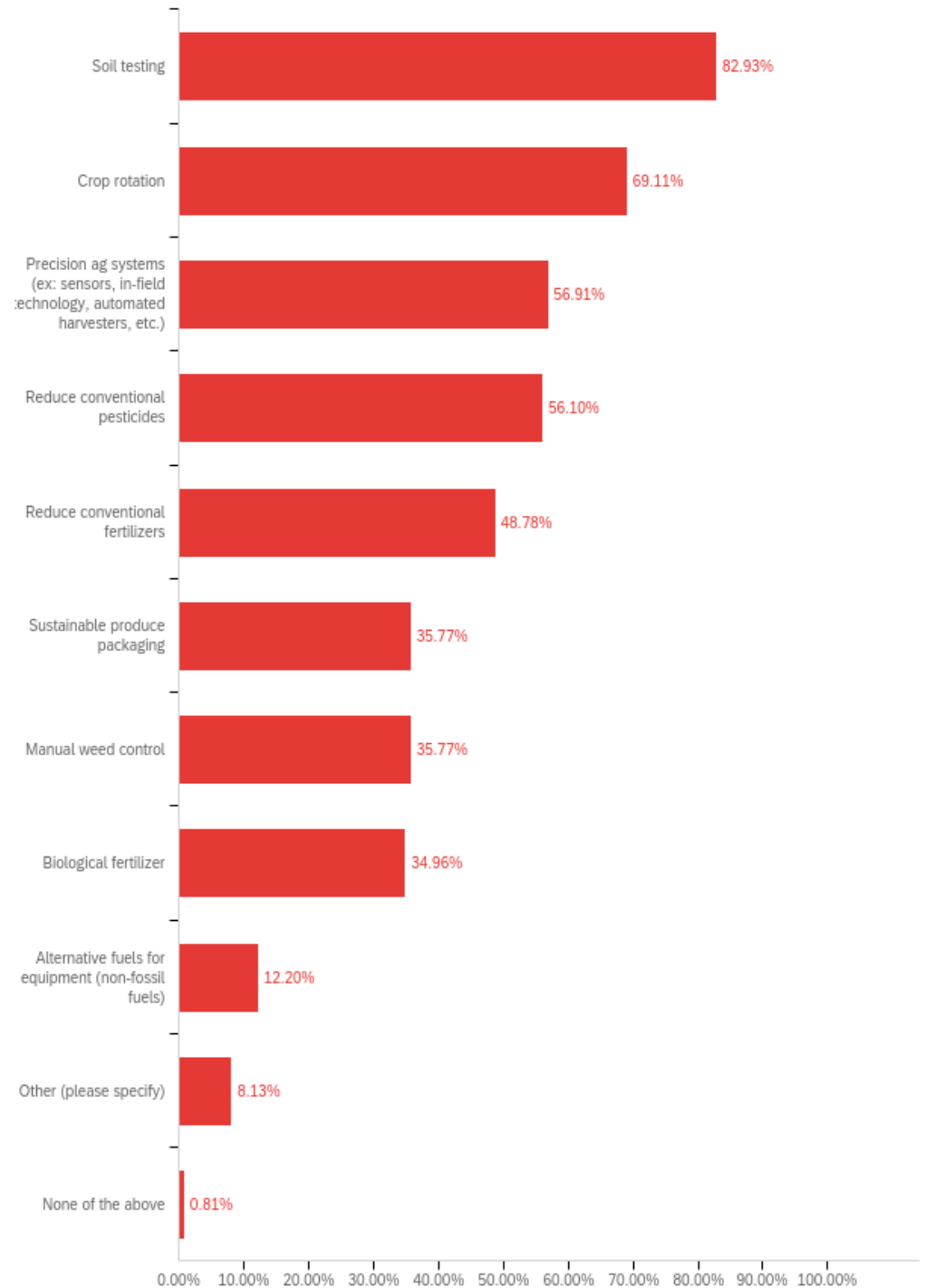
**Worth noting a not insignificant amount (18%) identify it as something “required”**





# What sustainable farming practices have you implemented? (select all that apply) - (n=123)

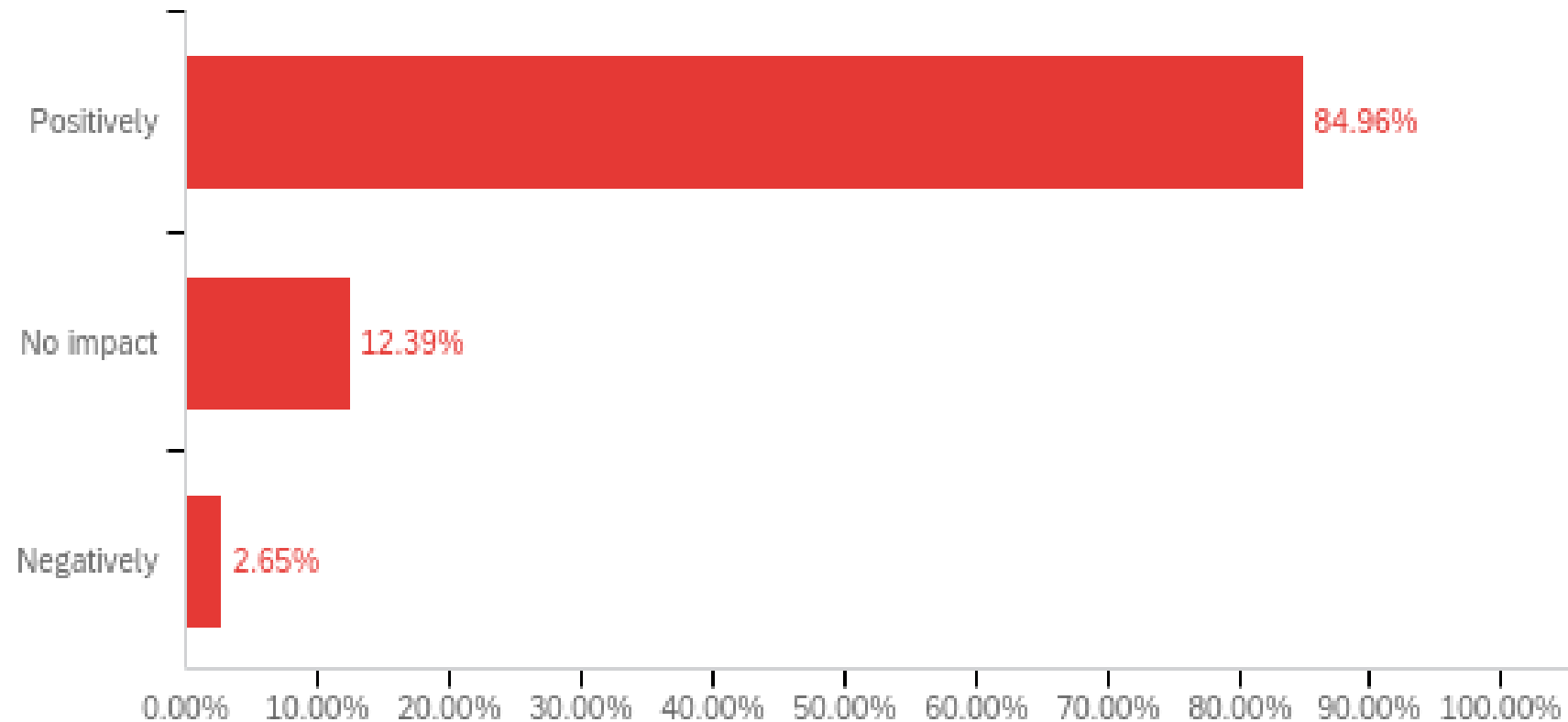
Practices related to efficient/precision rank highest





# In your opinion, how is technology impacting sustainability? - (n=111)

Majority of growers must be finding value through tech

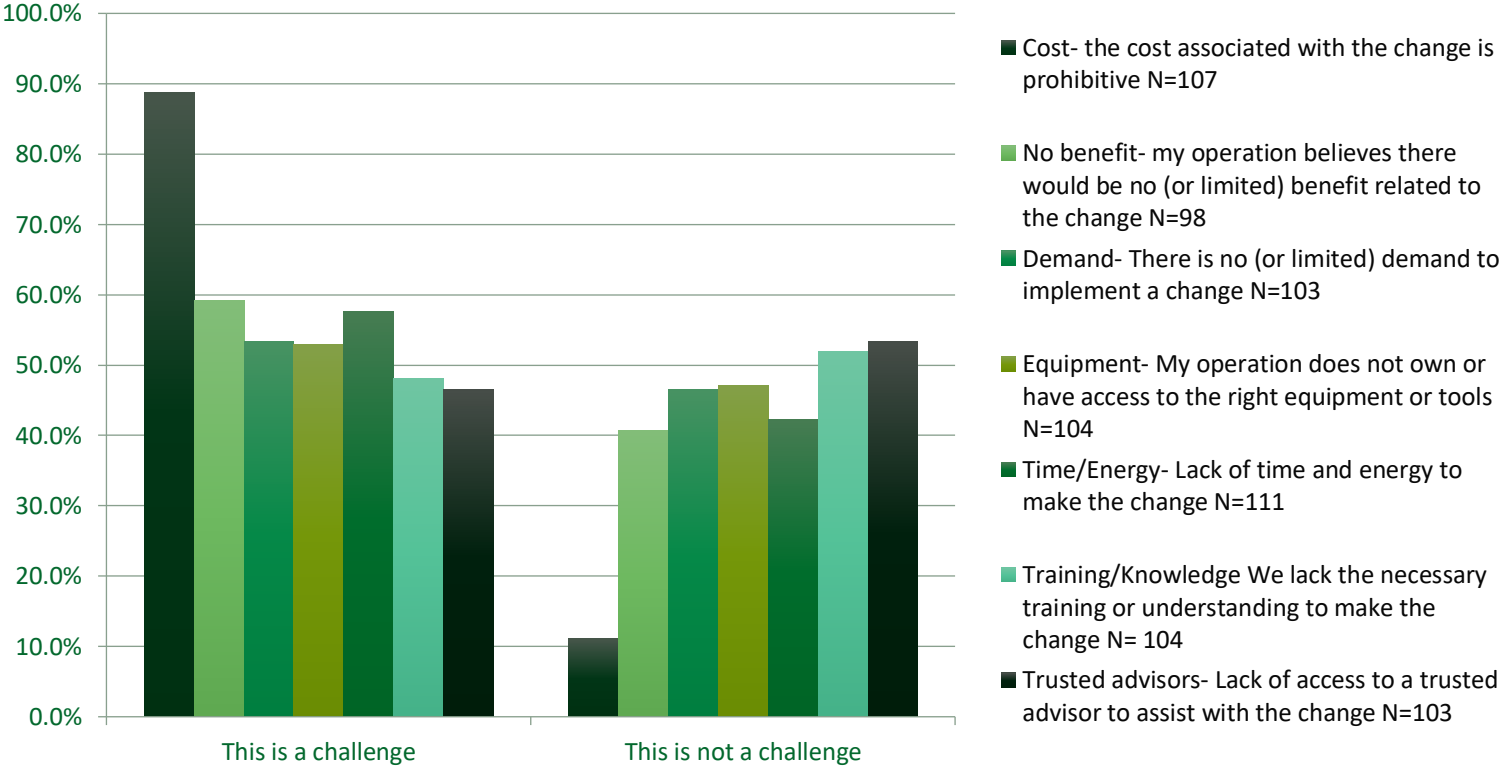






# When it comes to deciding to adopt a new sustainable practice for your operation, what are some of the challenges you face?

**Cost ranks highest by far; typical in ag and likely driven by COVID recession**

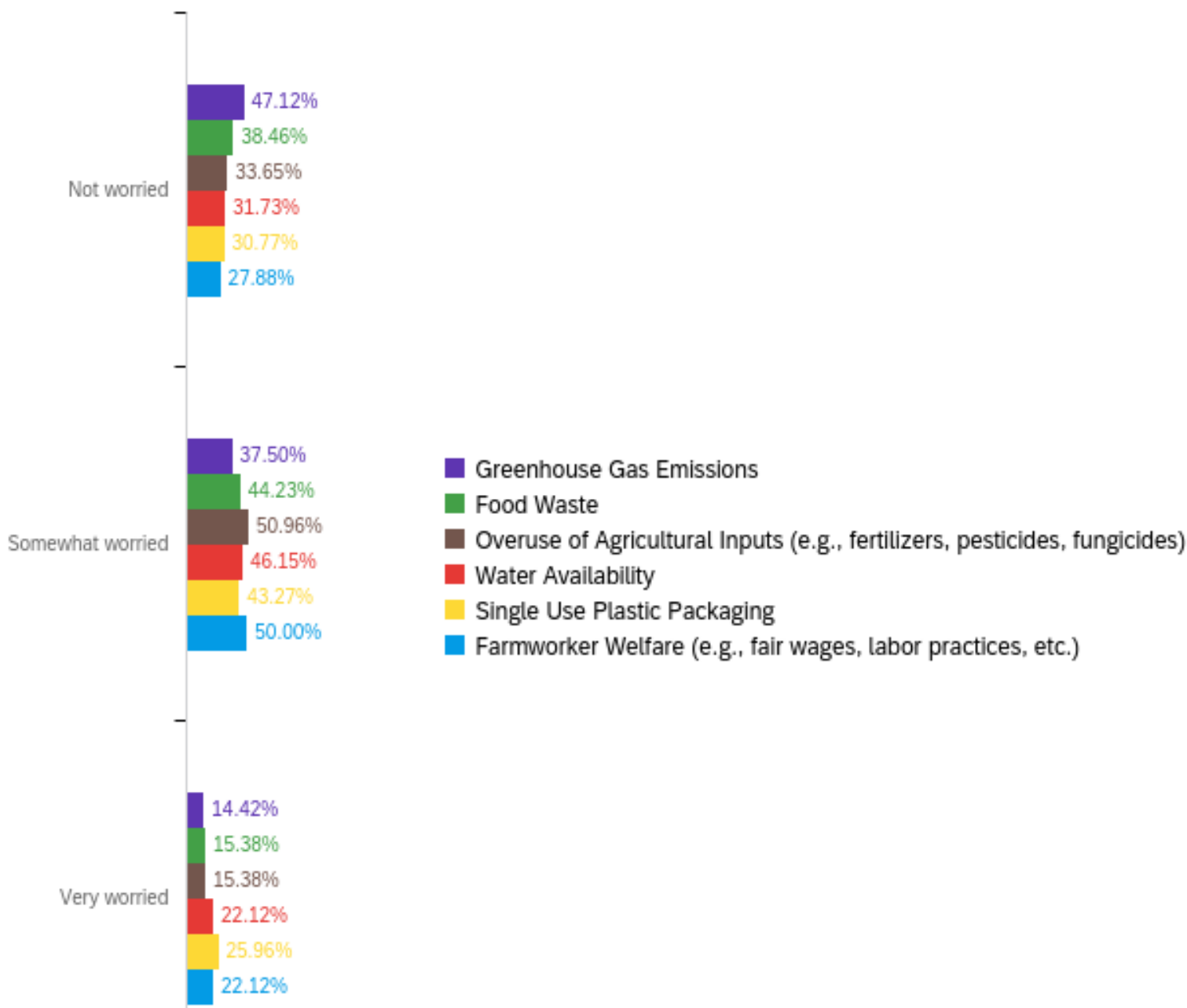




## How worried are you a solving the following sustainability issues in lifetime? – (n=104)

**Water, packaging, and labor as highest concerns;**

**Notable that packaging is high concern here but this does not translate to implementation of packaging issues or association of packaging with sustainability**





# The Packer's Sustainability Survey

## Key Consumer Insights

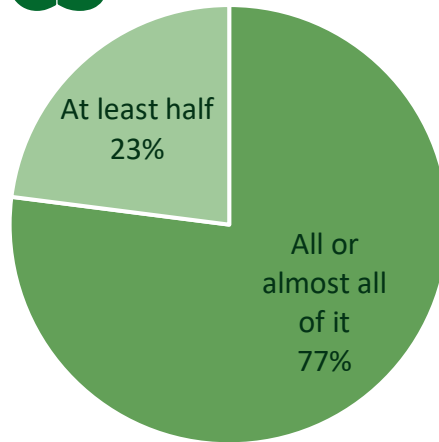
*September 2021*



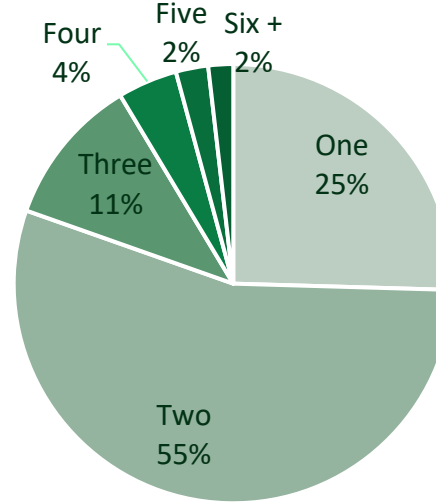
# Demographics

Participants are grocery shoppers from smaller households. They represent a range of ages, incomes and genders. The majority are Caucasian.

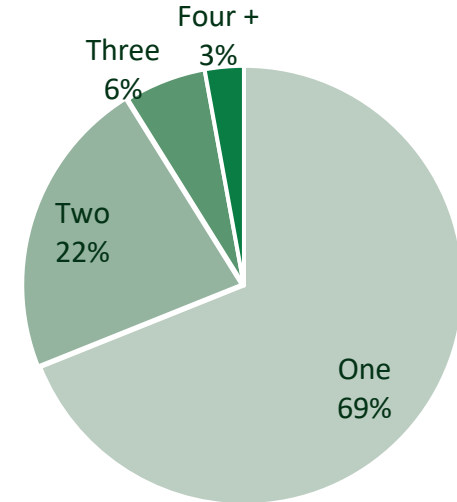
### Grocery Shopping



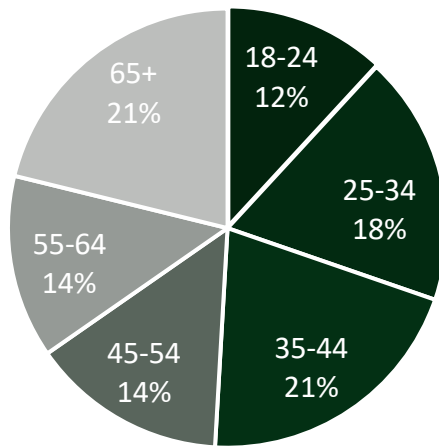
### People in Hhld



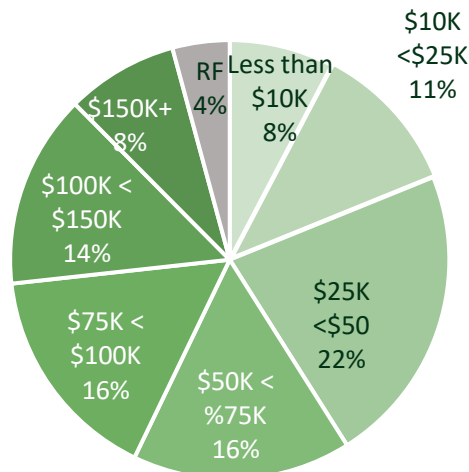
### Children <18 in Hhld



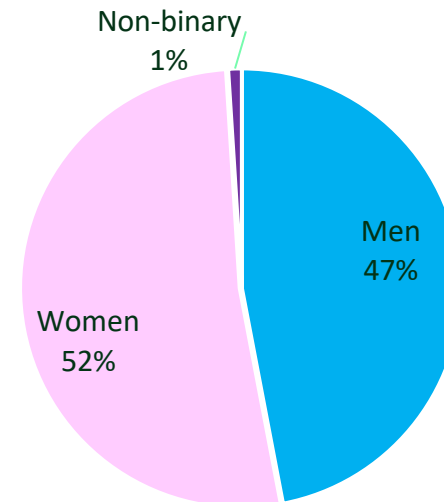
### Age



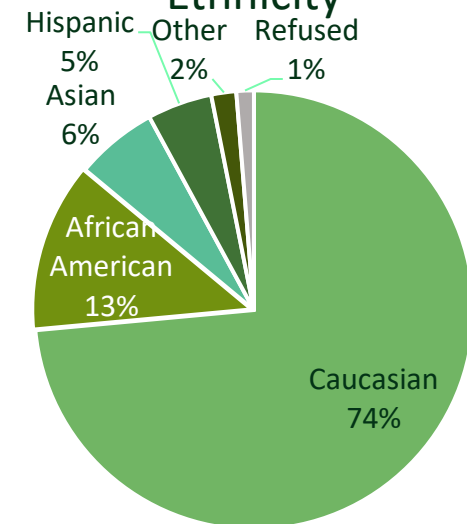
### Income



### Gender



### Ethnicity



What is your gender?

What is your ethnicity?

How many people over the age of 18 live in your household?

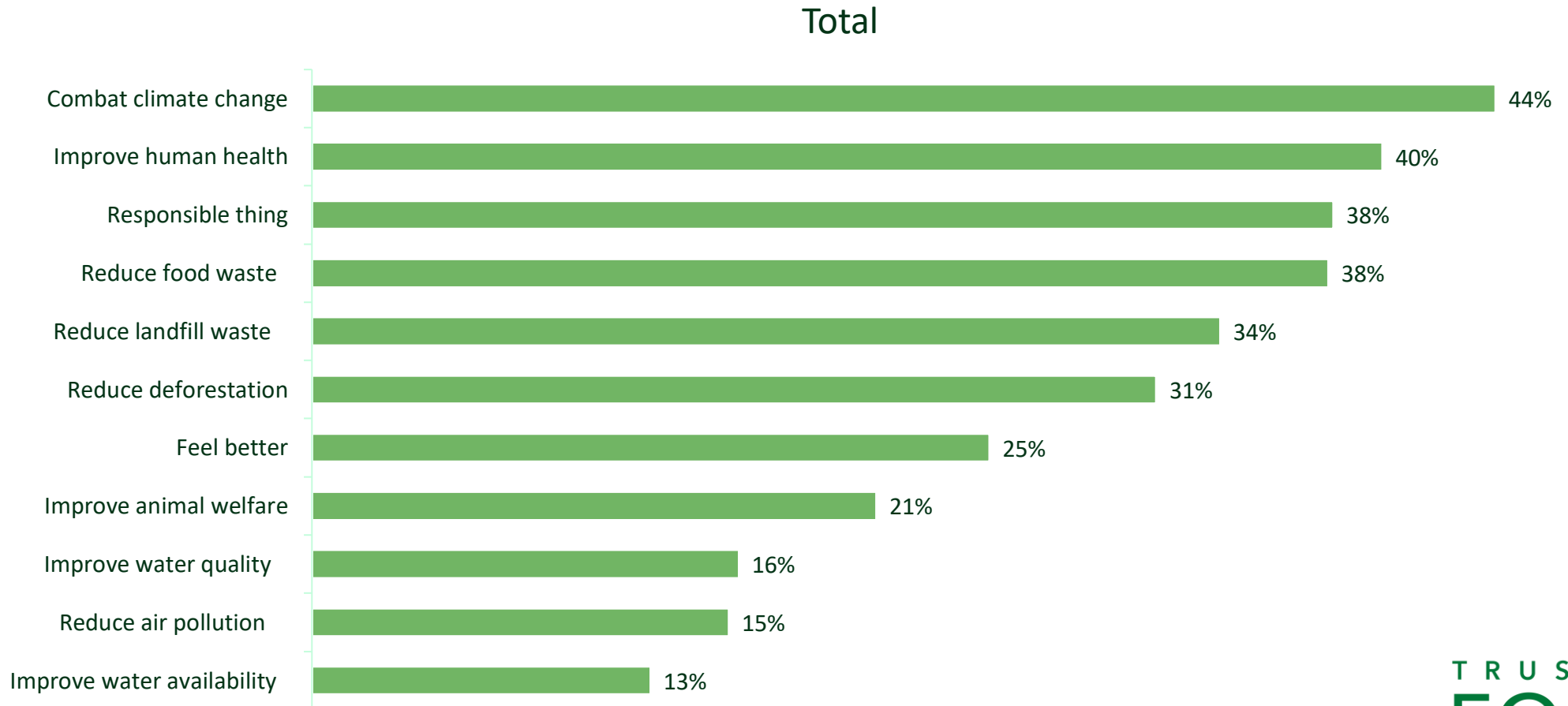
How many children under the age of 18 live in your household?





# Motivations

There is general agreement that demanding more sustainability would combat climate change, improve health, reduce waste, and be the right thing to do.



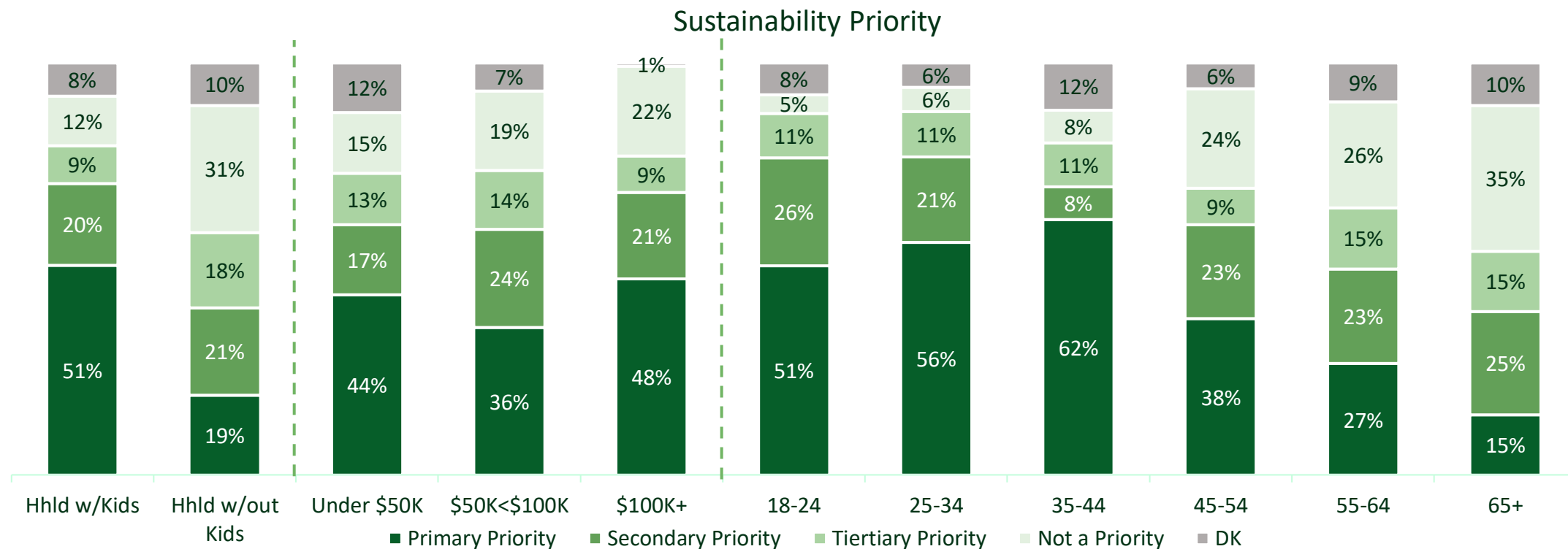
What are the TOP THREE main reasons for you to demand more sustainability? (select all that apply)

N=548



# Role of Sustainability

The importance of sustainability varies dramatically by age and the presence of children in the household.



How high of a priority is sustainability in your buying decisions?

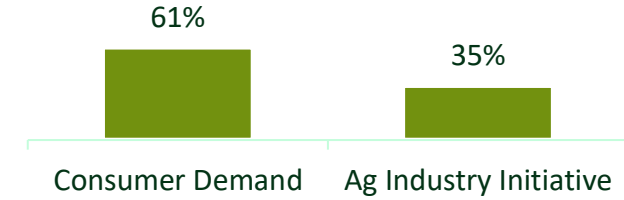
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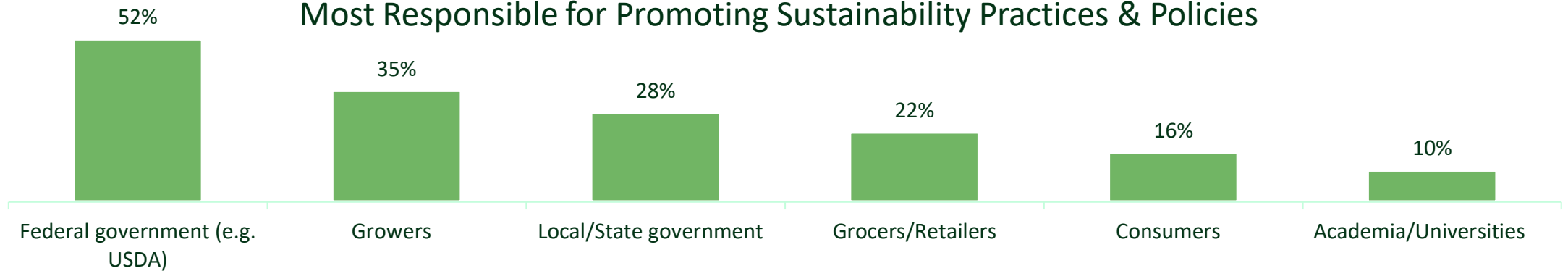
# Leadership on Sustainability

Most put the onus for education and promotion on the federal government. They feel the food industry responds to consumer demand.

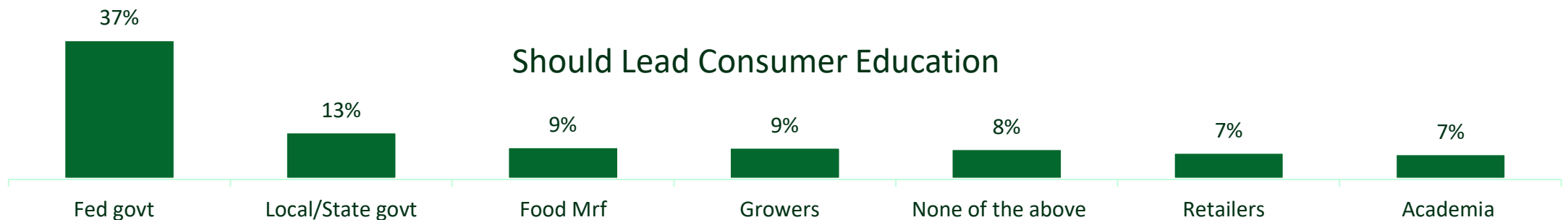
Food Industry Responds to:



Most Responsible for Promoting Sustainability Practices & Policies



Should Lead Consumer Education



*In general, do you feel like sustainability efforts in the food industry are in response to:  
Who do you feel is most responsible for leading and promoting sustainability practices and policies? (select all that apply)  
Who do you think should take the lead to educate consumers on sustainability?*

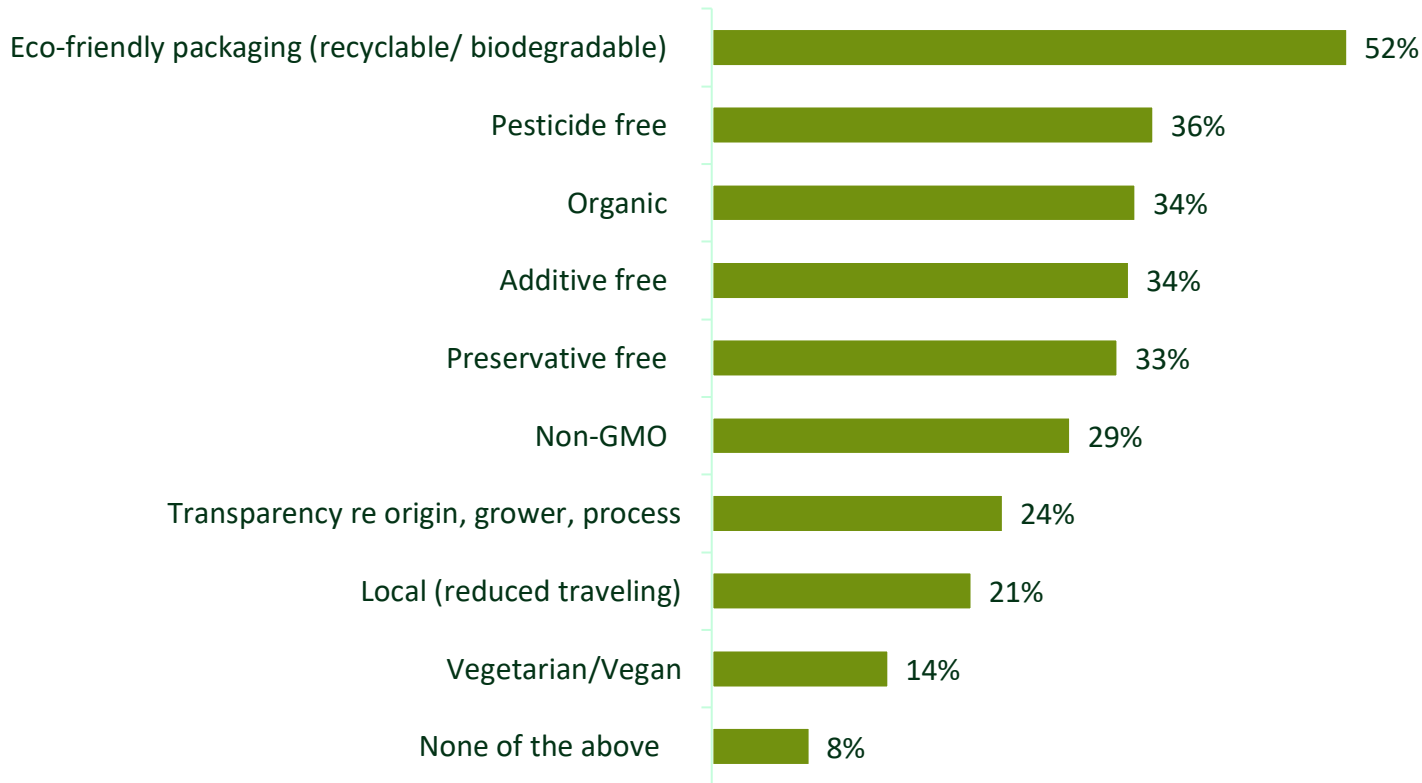
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# Clarity in Labeling

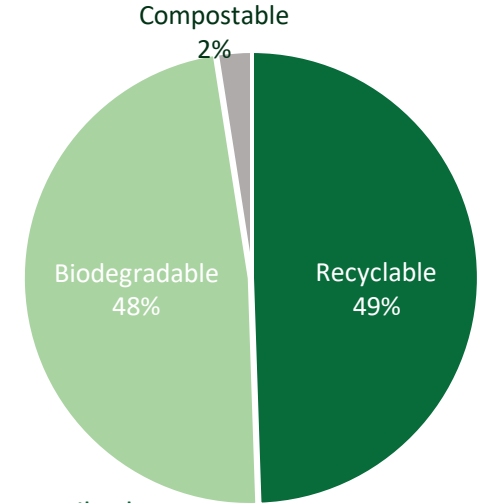
Recyclable and biodegradable are key terms for labeling.

## Labels Defining Sustainability



Which of the following labels/product features help you define a product as sustainable? (Select all that apply)

## Packaging Solution Preferred



Described as:

- Recyclable packaging
- Biodegradable packaging (breaks down naturally)
- Compostable packaging (requires specific conditions to breakdown)

N=548



# The Packer's Sustainability Survey

## Key Packaging Insights

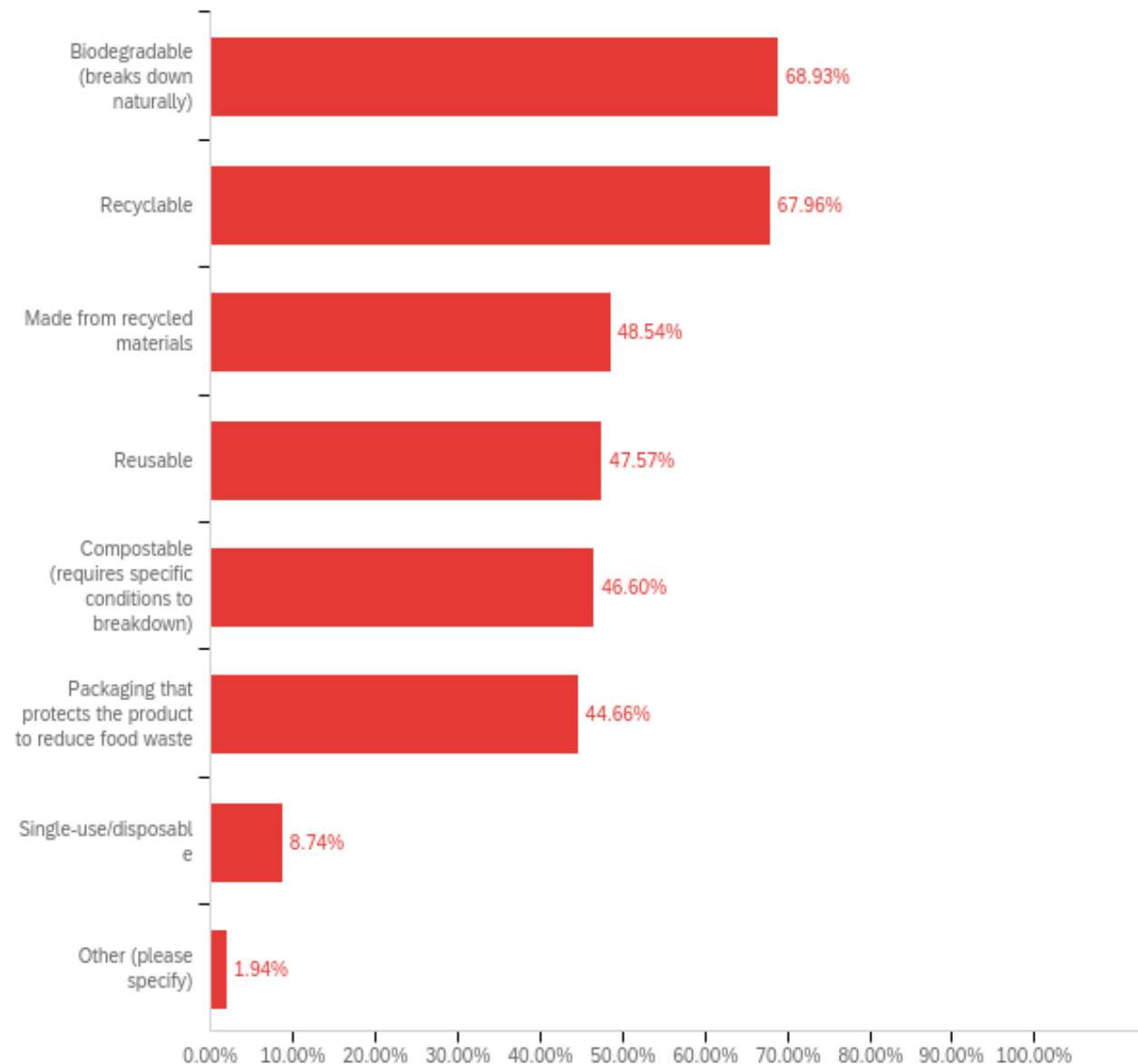
*September 2021*



# Grower Survey:

What does sustainable packaging mean to you? (Select all that apply) - (n=103)

**Notably lower association with circular economy than environmentally friendly**

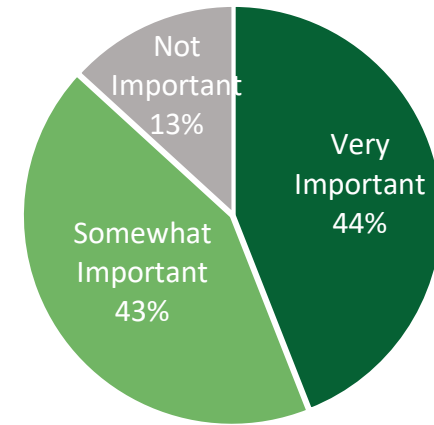


# Consumer Survey: Role of Sustainability in Packaging

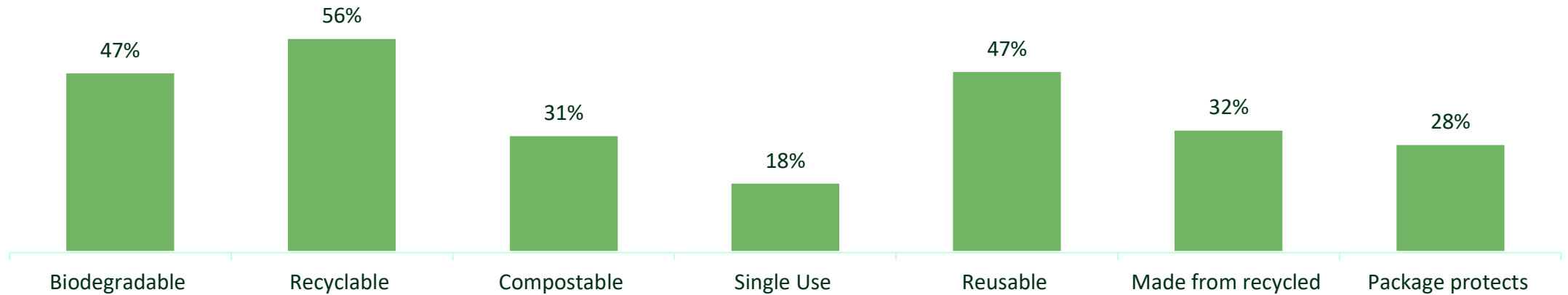
**Packaging plays a role in assessing sustainability.**

Recyclable, reusable and biodegradable are trigger words that indicate sustainable packaging.

### Importance of Sustainability in Packaging



### Meaning of Sustainable Packaging



*How important is it to you that the food you purchase is in packaging that is sustainable?  
What does sustainable packaging mean to you? (Select all that apply)*

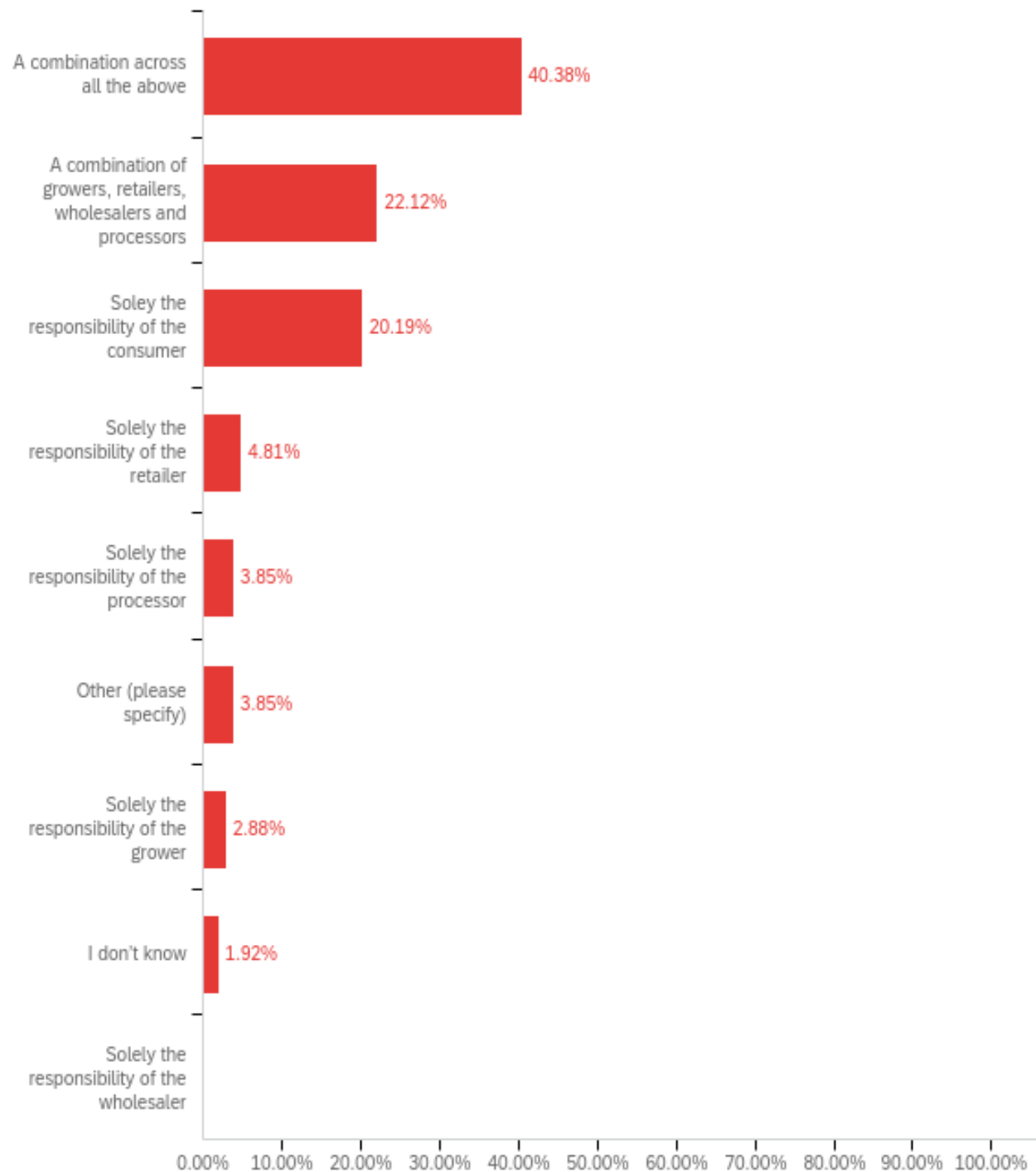
N=548



# Grower Survey:

How should the cost of sustainable packaging be shared across the supply chain? - (n=104)

**Surprisingly high willingness to share the cost burden across chain instead of relying on retailers / consumers**

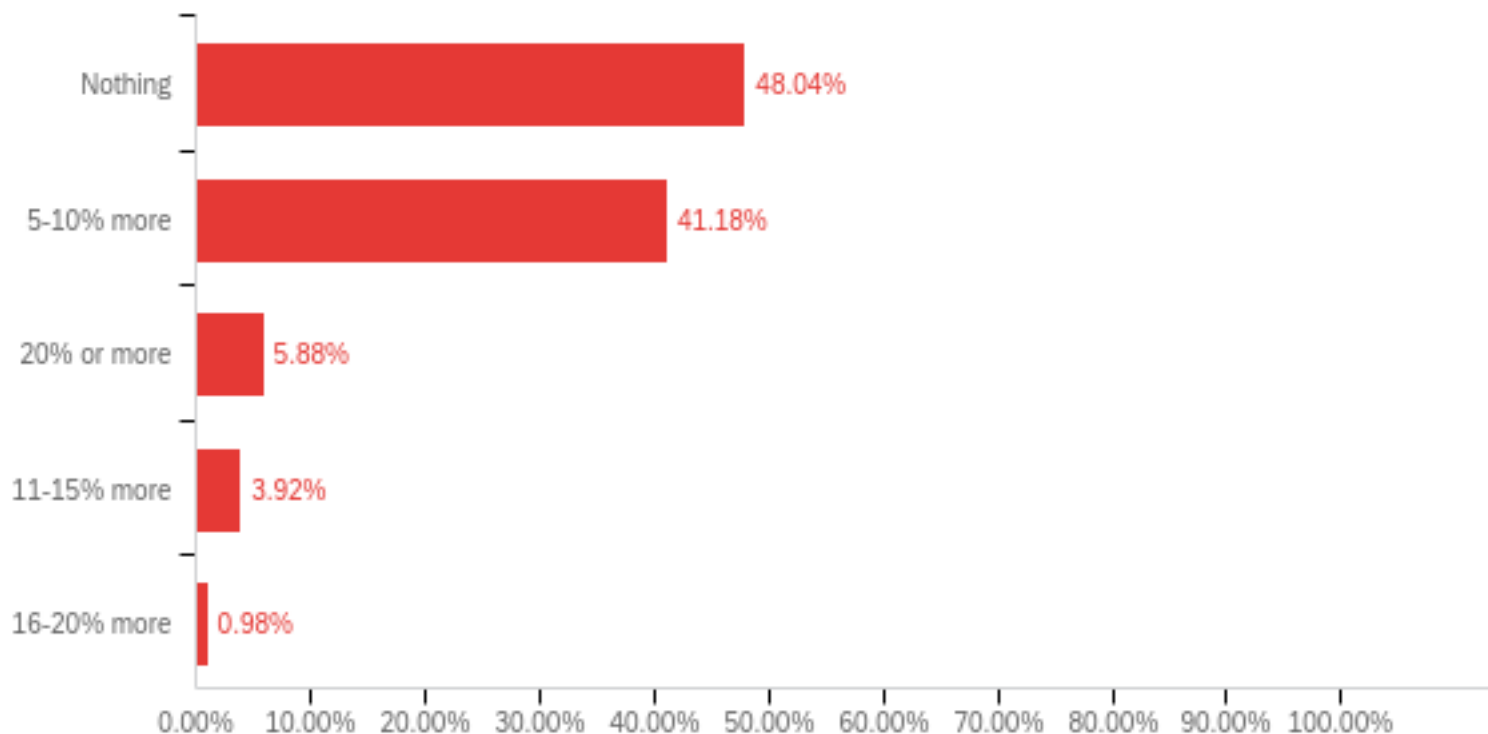




# Grower Survey:

How much more do you think consumers are willing to pay for more sustainable packaging? - (n=102)

**Unaligned with consumer response meaning they don't understand consumers here**



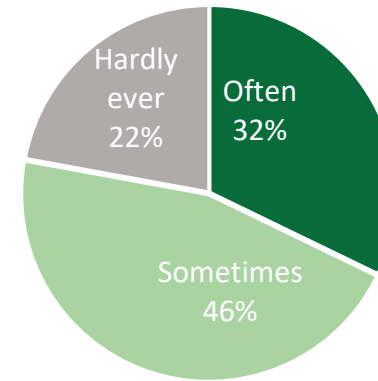


# Consumer Survey: Impacting Purchase

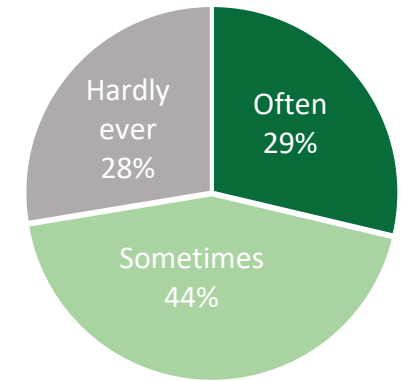
In general, purchase decisions are influenced by food and package production.

Overall, price is the primary driver of the final purchase decision.

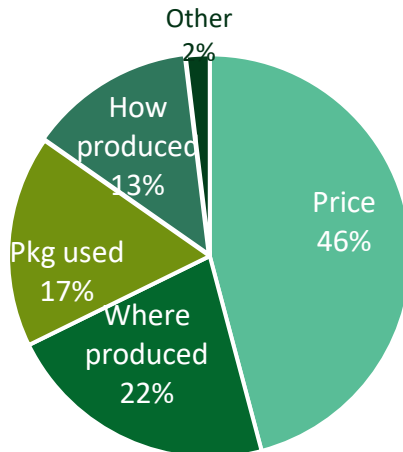
Frequency of Purchasing based on Food Production



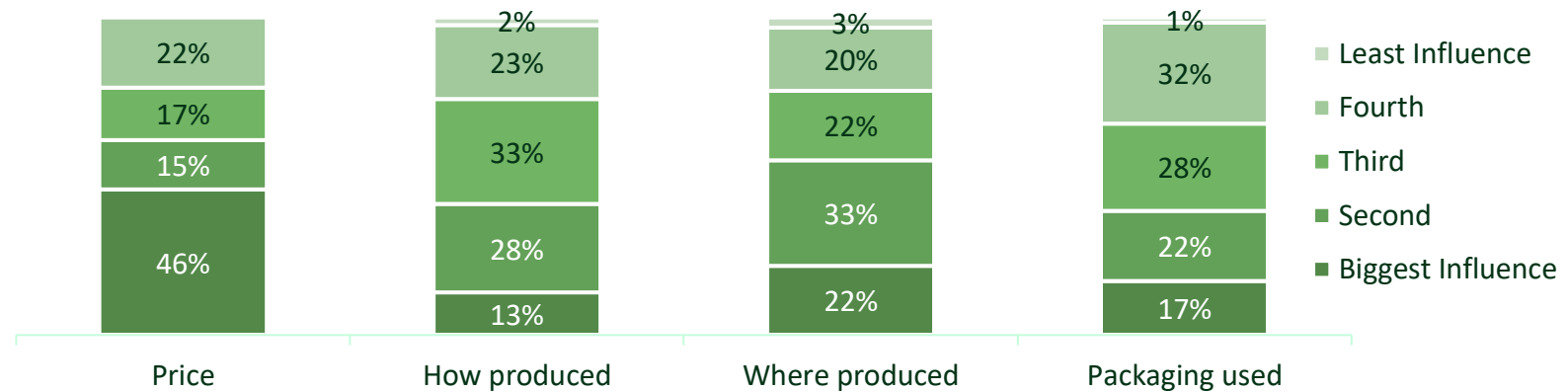
Frequency of Purchasing based on Package Production



Biggest Influence on Purchase Decision



Influence in Deciding Purchase of Sustainably vs Non-sustainably Produced Product



How often do you make purchasing decisions based on how or where the food was produced (ex: organic, local, non-gmo, etc.)?

How often do you make purchasing decisions based on how the package was produced (ex: recyclable, biodegradable, etc.)?

If you were trying to decide between a sustainably or non-sustainably produced product, how would each of the following rank, starting with the biggest influence in your decision making process to the least?

N=548

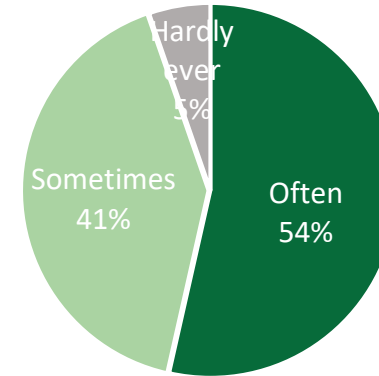


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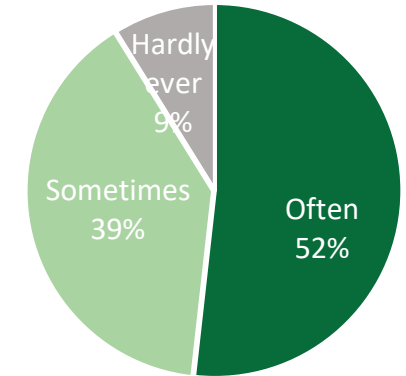
base = Sustainability is Top Priority

The audience who considers sustainability a top priority gives substantially greater weight to product and packaging production than the country overall.

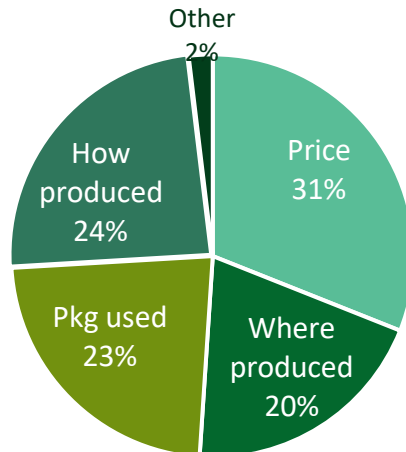
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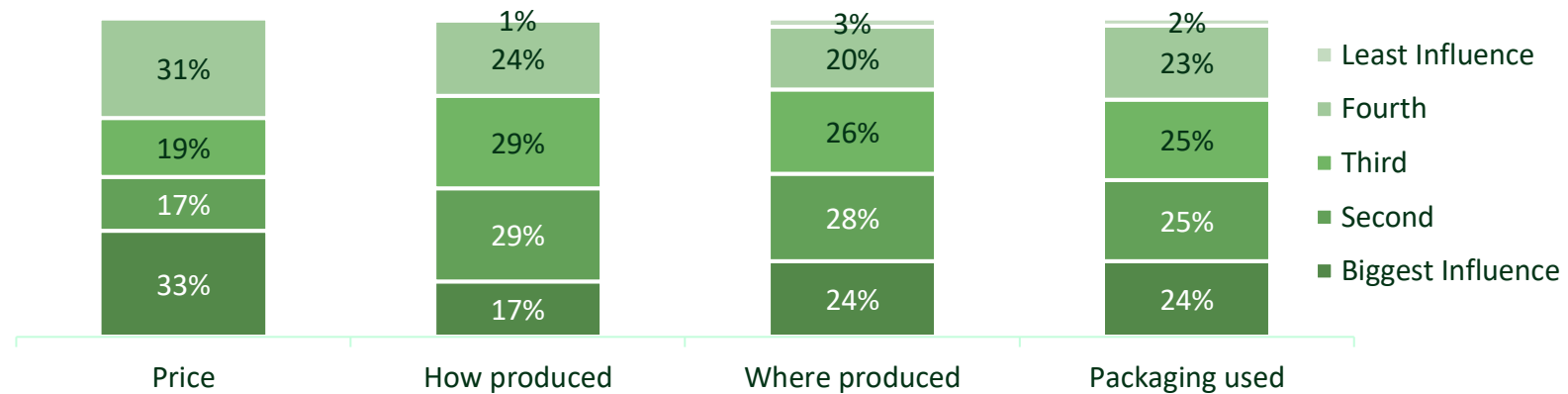
Frequency of Purchasing based on Package Production



Biggest Influence on Purchase Decision



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N=236

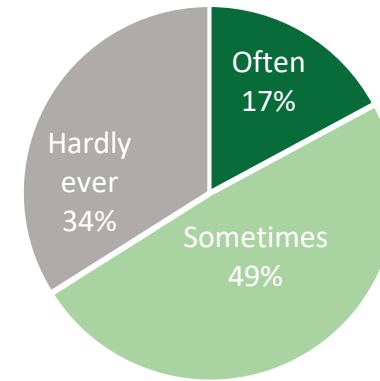




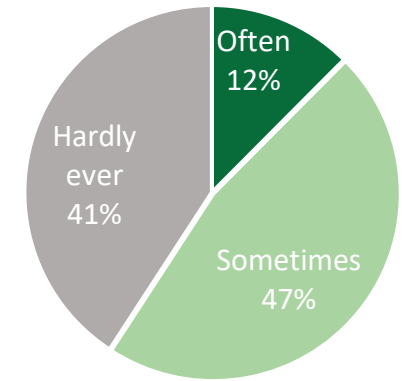
# Consumer Survey: Impacting Purchase

base = Sustainability is Not Top Priority  
 However, those with less commitment to sustainability give the issue far less thought and are more price driven in their decision-making.

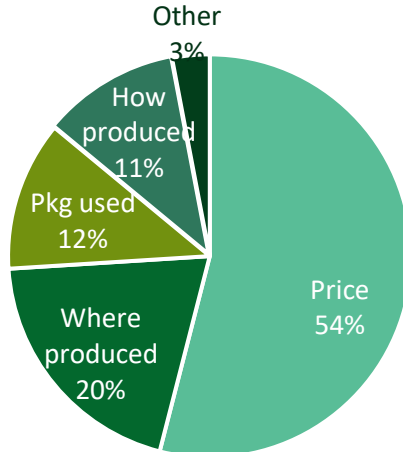
Frequency of Purchasing based on Food Production



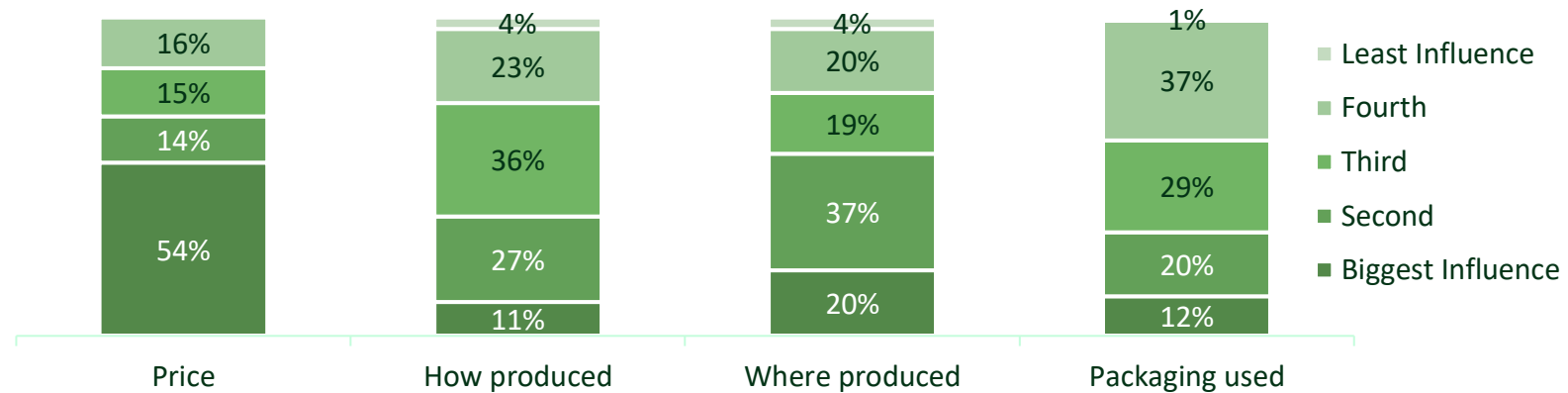
Frequency of Purchasing based on Package Production



Biggest Influence on Purchase Decision



Influence in Deciding Purchase of Sustainably vs Non-sustainably Produced Product



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N=322