



SRS
LONDON
2025

28-30 JANUARY 2025

LONDON

► **EXECUTIVE SUMMARY**

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S U S T A I N A B I L I T Y I N M O T I O N

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SRS
IN NUMBERS



250+
PARTICIPANTS





152+
COMPANIES



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INTRODUCTION

The importance of leadership in all its forms echoed throughout the two-day event, which brought together more than 250 business leaders around the theme “Sustainability in Motion”.

SRS 2025 explored how sustainability efforts can support long-term growth, influence consumer behaviour and create positive change.

“

You can't afford to lose sight of your commitments to each of your stakeholders. And the planet is clearly integrated into those commitments. It doesn't sit alongside. It's not a nice to do.

Ken MURPHY, Group CEO, Tesco PLC



From the corridors of corporate boardrooms to the aisles of supermarkets, sustainability is impacting the way companies operate.

The businesses that thrive in the coming decade will be those that embed sustainability into their operations—not as a separate initiative. From decarbonisation commitments to ecosystem protection, from nutrition to plastic waste reduction, and human rights to employee wellbeing, companies are moving to turn promises into action.



Key Themes

The discussions at the event highlighted five key topics that are shaping the future of retail and sustainability.



Future-Proofing Business Models emerged as a critical priority, ensuring companies can adapt to disruptions while maintaining sustainable and profitable growth.



From Commitment to Action: Driving Systemic Change emphasises the urgency of turning sustainability pledges into measurable progress.



Collaboration & Collective Impact underscores the power of partnerships in scaling solutions across regions and sharing best practices.



Data, Technology & Innovation as Enablers showcases the role of digital tools in optimising supply chains and driving efficiency.



Finally, **Consumer-Centric Sustainability & Behaviour Change** reinforces the need to engage and empower consumers to transition to more sustainable consumption.

FUTURE-PROOFING BUSINESS MODELS

Sustainability at SRS has a layered meaning: In addition to environmental concerns, it also encompasses the long-term resilience of businesses in a changing world. The speakers underscored that sustainability is more than green initiatives—it is about ensuring businesses can navigate disruption and create lasting value.

“

For a systemic change, we must parallel-track long-term, sustainable solutions alongside short-term profit focus. Failure to do so will leave us in the same position 30 years from now.

Stuart CHIDLEY

Co-Founder, Beauty Kitchen & Reposit





“

Sustainability means business. You cannot decouple them (...). We need to make sure we have resilient supply chains.

Hein **SCHUMACHER**, CEO, Unilever

While companies continue to work to decarbonise their operations, it is also starkly evident that supply chains must be safeguarded against disruptions caused by the changes that have already taken place. Speakers discussed ways to mitigate risk and move towards long-term adaptation.



Imke van GASSELT, VP Health & Sustainable Diets, Ahold Delhaize and Christine MONTENEGRO McGRATH, Senior Vice President and Chief Impact & Sustainability Officer, Mondelēz International. Opening Plenary Session: A Warm Welcome to the Sustainable Retail

Takeways

This approach to innovative resilience was especially evident in the interactive working sessions in which panellists and the audience worked together to share climate solutions from a variety of angles. Some adaptive interventions discussed in these sessions include:

- ▶ **Controlled Environment Agriculture (CEA):** Companies like 80 Acres Farms, which has a strategic partnership with The Kroger Co., use indoor vertical farming to mitigate the impacts of extreme weather and ensure stable food production despite climate disruptions.
- ▶ **Regenerative agriculture:** This method of farming, which focuses on regenerating soil health, increases drought resistance and carbon sequestration, ensuring the long-term sustainability of farmlands while helping companies meet net-zero goals.
- ▶ **AI-driven forecasting technology, like Food Forecast:** These tools help retailers anticipate climate-related supply chain disruptions and manage inventory accordingly.

2 FUTURE-PROOFING BUSINESS MODELS

Speakers also stressed the importance of protecting the people involved at every stage of a supply chain. In the session “**Building a People & Planet-Positive Future**”, panellists noted that human rights are implicated in both “resilience issues” and “reputational risks.” They pointed to **landscape initiatives** that invest in the resilience of natural environments and the communities living alongside them.

“

“If you want to have resilience, you’ve got to protect the natural environment. If you want to have a resilient supply chain, you’ve got to be protecting communities, ensuring their sustainable livelihoods”, said Joseph James, Sustainability Manager, Forest Risk Commodities, at Sainsbury’s. “They’re totally linked.”



Joseph JAMES, Sustainability Manager Forest Risk Commodities, Sainsbury's; Eloise SAVILL, Private Sector Adviser, Anti-Slavery International; Jessica RIVAS, Director, Human Rights, McDonald's. Panel *Building a People & Planet-Positive Future: Integrating Human Rights into the Climate Transition*.

As he and other speakers stressed, sustainability requires a holistic approach, integrating technological innovation, regenerative practices and community investment. In an era of increasing uncertainty, businesses that invest in

resilience solutions will not only mitigate risk but also unlock new opportunities for sustainable, long-term growth.



Joseph JAMES, Sustainability Manager Forest Risk Commodities, Sainsbury's. Panel *Building a People & Planet-Positive Future: Integrating Human Rights into the Climate Transition*.

FROM COMMITMENT TO ACTION: DRIVING SYSTEMIC CHANGE

As time races towards 2030, the finish line of multiple commitments made over the past decade, it is clear that setting targets is no longer enough; businesses need to translate ambition into measurable, impactful actions.

SRS speakers emphasised the urgency of moving beyond pledges to tangible solutions that drive real-world change. Discussions showcased practical strategies companies are deploying to create impact in areas including plastic waste reduction and decarbonisation.

One locus of commitment over the past few years is the **global plastics treaty**, still under negotiation at the time of SRS 2025 despite initial goals to finalise the text by the end of 2024. Ahead of the legislation, the CGF is laying down the foundation for the circular economy.

Left image: **Julia KOSKELLA**, Director - Packaging Innovation & Reuse, SYSTEMIQ Ltd. Panel *Sustainable Packaging in Practice: Balancing Design, Consumer Benefits and Business Realities*.

Right image: **Jean HORNAIN**, CEO, CITEO, **Dr. Zahra BHOJANI**, PhD, Sustainability and Enterprise Plastics Lead, Loblaw Companies Limited, and **Stuart CHIDLEY**, Co-Founder, Beauty Kitchen & Reposit. Panel *From Waste to Worth: The Impact of Reuse and Refill Models on the Future of Retail*.

Takeways

Two breakout sessions, “**Sustainable Packaging in Practice**” and “**From Waste to Worth**”, focused specifically on plastic solutions. Speakers noted that the CGF is helping companies adapt their plastic strategies through innovative initiatives:

- ▶ **The CGF Golden Design Rules (GDR)**: developed a set of harmonised guidelines for plastic packaging, which has been adopted by over 40 member companies, including global retailers like Carrefour, Loblaw Companies Limited, and Walmart. Companies can use these guidelines in their own packaging strategies and can require them from their suppliers.
- ▶ **Extended Producer Responsibility (EPR)**: EPR is an environmental policy approach in which a producer’s responsibility for a product is extended to the post-consumer stage of a product’s lifecycle. The CGF and its members developed the Optimal EPR guideline to harmonize EPR schemes globally.
- ▶ **Reuse-refill pilot projects**: In 2024, Loblaw Companies Limited, L’Oreal and other CGF member brands collaborated on a pilot project in Ottawa where consumers could refill standardised containers with personal and home care products from various leading brands.



“

Tell your CEO you will be out of the market in 2030 in Europe—and also in the U.S., with California regulation—without packaging sustainability.

Carsten BERTRAM,
Head of Packaging Sustainability,
Henkel Consumer Brands



Net-zero commitments gathered global momentum after the [IPCC](#) popularised the term with the publication of [SR15](#) in 2018. However, as the deadline approaches, some companies are finding it more difficult than expected to fulfil their pledges.

“

I think the reaction to that is to learn the lessons and inject a bit more discipline into our approach to sustainability so that we can come back better and overcome these barriers. This is not about retreating. It’s about saying, ‘How can we be better equipped to do it right?’

Harry MORRISON,
Partner of Sustainability & Responsibility,
Bain, session *From Ambition to Action*



He and Bain Management Consultant Caroline Jean explained Bain’s Shield and Sword approach, a strategic framework that helps businesses prioritise sustainability efforts by categorising issues into two groups. “Shields” form the basic license to operate and protect businesses from regulatory risks and reputational harm, while “swords” allow companies to go beyond compliance to drive differentiation and business value.

Takeways

While recognising the technical and financial challenges involved in decarbonisation, SRS speakers encouraged companies to continue to work towards their targets with easy wins:

Prioritising high-impact emission sources:

- ▶ Saif Hameed, founder and CEO of [Altruistiq](#), noted that up to 70% of a supply chain's emissions are often associated with a relatively small group of suppliers. He recommended that companies focus on tracking and cutting emissions at their top 100 emitters rather than attempting to apply the same approach to all suppliers.

Reducing food waste

- ▶ Speakers repeatedly referred to food waste reduction as an effective and relatively simple method to cut greenhouse gas emissions, all the more achievable because it has a clear business incentive.

Retail energy efficiency:

- ▶ The retail sector has many opportunities to cut emissions through investing in energy efficiency, such as more efficient refrigeration and transport logistics. Ken Murphy, Group CEO of Tesco, for example, noted that the company is making significant progress towards its net-zero goal by transitioning away from GHG refrigerants, previously its largest source of emissions.

“

Ken Murphy also emphasised companies' responsibility to call for regulation that will hold them to their commitments.

“These are pernicious and difficult to manage problems, but the rallying cry is that it is hard work, yet absolutely within government and industry's interest. Otherwise, we won't achieve net zero.”



COLLABORATION & COLLECTIVE IMPACT

With a speaker list that included representatives of NGOs, government agencies and regulatory bodies in addition to industry leaders, it is no surprise that many of the conversations at SRS showcased public-private partnerships and cross-sector collaborations. These projects' success stems from their ability to harness the strengths of each sector: industry's scale and efficiency, civil society's credibility and expertise, and government's enforcement, funding and reach.

Takeways

Industry engages with national food policy in the UK

- ▶ As the UK develops a new national food policy, it is soliciting input from companies and civil society to ensure practical and effective regulations. As part of this effort, the nonprofit organisation [WRAP](#) partnered with Waitrose and other retailers to conduct consumer behaviour studies on loose versus packaged produce and offer evidence-based recommendations.

Woolworth's combats modern slavery with the On the Level and the Issara Institute

- ▶ After discovering and publicly disclosing indicators of modern slavery at a supplier in Malaysia, The Woolworths Group partnered with the Fair Hiring Initiative to commence a proof of concept to verify the practices of five labour-hire providers in Nepal (a major labour-sending corridor to Malaysia) in an attempt to begin to address one of the root causes of debt bondage. Woolworths then partnered with the [Issara Institute](#) to scale up this ethical recruitment approach.



Estelle HERSZENHORN, Head of Food System Transformation, WRAP. Panel *From Farm to Fork to Landfill: Tackling Waste's Climate Impact*.

“

No company can tackle human rights challenges alone—especially in upstream supply chains and conflict zones. Companies need to work with peers, governments and expert organisations to drive systemic change while ensuring compliance with regulations.

Richa MITTAL,
Executive Vice President
& Chief Innovation Officer,
Fair Labor Association (FLA)



In addition to cross-sector collaborations, SRS 2025 also emphasised collaboration among Coalitions of Action within The CGF. Several CGF projects discussed at the event were spearheaded by multiple

CoAs, with coalition leaders sharing valuable subject matter expertise with each other and the broader industry. Examples include:

Takeways

- ▶ **The Sustainable Kitchen:**
This project, developed by the Coalition for Healthier Lives and the Food Waste Coalition, exemplifies productive collaboration between coalitions. Designed to showcase best practices in consumer communication on health and sustainability, this online hub shares tips to inspire healthier cooking and reduce food waste, including recipes sponsored by leaders such as Frans Muller, CEO of Ahold Delhaize and Cécile Béliot, CEO of Bel Group.
- ▶ **Converged Human Rights and Environmental Due Diligence (HREDD) Assessment Tool:**
Developed by the **Human Rights Coalition** in collaboration with [AIM-Progress](#), this open-source tool is designed to help businesses identify, prevent and address potential risks to human rights and the environment across their business operations and supply chains.

These projects demonstrate that real progress comes from genuine collaboration, and SRS is the embodiment of that collaboration. Whether tackling forced labour, rethinking food policy or building better industry standards,

the most effective solutions emerge when businesses, policymakers and civil society challenge each other and push beyond their individual interests.

DATA, TECHNOLOGY & INNOVATION AS ENABLERS

Robot farmers, lab-grown food and AI-powered waste bins no longer belong to the realm of science fiction—they are already helping companies achieve their sustainability goals and reduce inefficiencies.

In addition to these and other exciting developments, SRS speakers discussed the importance of collecting and standardising the data that powers innovation and allows companies to measure and verify their progress.



On the topic of data standardisation, leaders from the [Towards Net Zero Coalition](#) presented their **harmonisation initiative**, an effort to streamline sustainability reporting while allowing businesses the flexibility to exceed minimum requirements.

With multiple players in complex supply chains aiming to reach net zero, suppliers are struggling to field non-standardised requests for data in different formats. The CGF is working with Boston Consulting Group to benchmark data requests and reduce inefficiencies.

Takeways

This harmonised approach to carbon reporting can help companies verify the progress they may make through a wide variety of decarbonisation innovations discussed at SRS, such as:

Recycled carbon

- ▶ A conversation with LanzaTech revealed an intriguing application for excess carbon. The company developed a method to capture waste gases such as carbon monoxide from steel mills and process it into ethanol, which can be used as a fuel additive, converted into sustainable aviation fuel or used to make polyethylene. Companies such as L'Oreal and IKEA are working with [LanzaTech](#) to create packaging and containers from this recycled material.

▶ Precision fermentation

Danone Ventures is investing in this technology, which involves cultivating fungi or bacteria to produce specific food ingredients, with particular interest in its potential to reduce the carbon impact of the dairy and meat industries.

Global Farm Loss Tool

- ▶ Developed in partnership between the CGF and WWF, this data-driven platform is designed to help farmers measure and report on food loss at the production level. After farmers provide on-farm data, it identifies where and why losses occur and provides evidence to support action to help farmers and supply chain partners reduce waste, improve resource efficiency and decrease methane emissions from decomposing produce.

“

The Global Farm Loss Tool is a fantastic example of how getting a better understanding of inefficiencies within the supply chain can seize valuable opportunities to increase on-farm profitability whilst addressing food waste and ensuring longer-term food security.

Sophie BAUER,
Head of Food System Transformation,
WWF UK



Automation and AI were also frequent topics of conversation at SRS. Speakers focused on applications of these technologies that can help retailers and the consumer goods industry achieve their sustainability goals.



Takeways

Automation in agriculture

- ▶ [Thorvald robots](#), developed by the Norwegian company [Saga Robotics](#), are autonomous devices that use UVC light instead of chemical fungicides to prevent powdery mildew on crops like grapes and strawberries; growers around the world are already using them. Growers also use automated mechanical weeders equipped with cameras and computational vision that help distinguish between weeds and crops while recording plant health data, supporting yield forecasting and inventory management.

Food waste monitoring

- ▶ A company called [Orbisk](#) developed AI-powered cameras that sit above waste bins, automatically tracking food waste and feeding data into inventory management systems. This enables businesses to make more sustainable purchasing decisions.

Granular carbon tracking

- ▶ Traditional carbon accounting relies on high-level aggregated data, potentially leading to inaccuracy and preventing businesses from making precise emissions reductions. AI-driven, real-time carbon tracking enables companies to optimise resource use, such as analysing ingredient consumption to identify areas for sustainable swaps or the carbon impact of packaging format shifts across product portfolios.

As companies continue to push the boundaries of sustainability, technology is proving to be an indispensable enabler of progress. By harmonising sustainability reporting and leveraging cutting-edge digital tools, businesses can transition from fragmented, reactive strategies to holistic, data-driven solutions that accelerate the journey towards a net-zero future.

CONSUMER-CENTRIC SUSTAINABILITY & BEHAVIOUR CHANGE

All people are consumers, and most will recognise the “value-action gap” in themselves: the disconnect between what consumers say about their sustainability concerns and how that plays out in their purchases and actions. Companies have the opportunity to bridge the gap by making the sustainable and healthy choice the best choice—the most convenient choice, the most attractive, and even the most affordable.

Takeways

Coming in from different angles, various panels explored the multifaceted challenge of making sustainable and healthy choices more desirable for consumers:

- ▶ **Food waste reduction:** Chris Franke, Senior Manager of Global Sustainability at Walmart, emphasised the need for a universal culture shift and behaviour change to prevent food waste at home, highlighting the role of marketing and consumer education.
- ▶ **Plant-Based Meats and Alternative Proteins:** Kirsty MacDonald, Principal at JamJar Investments, discussed the hype and drop in the plant-based meat market, emphasising the need for consumer behaviour change and realistic growth expectations.
- ▶ To encourage healthier and more sustainable diets among consumers, Ahold-Delhaize launched a protein ratio target for European brands, aiming to achieve a 50/50 balance between animal and plant-based protein sources in products.
- ▶ **Growing Focus on Sustainability and Social Impact** Solitaire Townsend, Founder of Futerra, highlighted the challenge of maintaining consumer engagement and the need to address the gap between consumers’ intentions and actions.



Imke van GASSELT, VP Health & Sustainable Diets, Ahold Delhaize.
Panel Future-Proofing Our Plates: Building Healthier and More Sustainable Food Environments.

“

“When we ask marketing to find a way to make this desirable and sellable, to give permission to our teams to make money out of sustainability, rather than just to do it as a responsibility, the value action gap will go away”, said Solitaire Townsend, Co-founder of Futerra, in her keynote focused on this topic, *Unlocking Consumer Behaviour to Drive Positive Change*.

“We’ll be doing what our businesses are already good at, which is selling products to consumers. We’ll just be selling more sustainable ones.”



Takeways

Digital tools, including AI-supported, can also help companies lead consumers towards healthy and sustainable choices. Some retailers are already leveraging these tools, including:

The [Choose Better](#) programme

- ▶ Majid Al Futtaim Retail (MAF), owner of the Carrefour franchise in the Middle East and Africa, launched a programme in collaboration with the [Coalition for Healthier Lives](#) Coalition of Action that nudges customers towards in-store and online healthier options. In addition, MAF displayed products’ embodied carbon footprint through a partnership with sustainability rating agency HowGood.

The AI-empowered shopper

- ▶ In Turkey, the retailer Migros Ticaret developed an AI-powered platform directing consumers towards online and in-store healthier options. The shopper is presented with incentives to make the healthier choice.

Adaptive marketing

- ▶ While some shoppers may be attracted to a sustainability-forward message, others may shop based on value. With AI-powered online marketing, retailers can shift the marketing of a sustainable product to be more value-focused for customers in a value space. For example, AS Watson and L’Oreal launched an AI-powered skin care analysis tool ‘Skinfie Lab’. Through one selfie, customers can get personalised, in-depth analyses of their skin and skin care recommendations. Discover more preventative health pilots in the [2024 Playbook](#).

Shifting consumer behaviour toward sustainability is not just about awareness—it’s about making the right choices feel effortless, rewarding and aspirational. As companies continue to refine these approaches, the future of sustainability will depend not only on offering better products, but on making them the instinctive and preferred choice for consumers everywhere.

CONCLUSION

From insightful discussions to vibrant networking, the 2025 Sustainable Retail Summit was an inspiring edition that fostered learning, collaboration, and innovation.

More than 250 business leaders, united by a commitment to positive change, demonstrated that sustainability is no longer a trend but a key lever for profitable growth.

By empowering them to translate commitments into tangible action, #SRS25 is aiming to propel the industry towards a more sustainable future. Thank you to all who participated in this year's truly memorable edition; together, we're driving transformation and creating lasting impact.



“

As business leaders (...), we must work together to create a better future for everyone. We recognise that the challenges ahead require action, and as a collective of consumer goods companies, we must do our part.

This means focusing on practical, collective actions that balance environmental stewardship with long-term growth and innovation. At The Consumer Goods Forum, experience has shown us the power of collaboration to source shared solutions that achieve important outcomes.

The ‘three Cs’ - Collaboration, Conversation And Commitment - are fundamental to our ethos, with an industry-wide commitment to actions shaped by collaboration and open conversation. I see them driving real-world impact all the time.

Wai-Chan CHAN,
Managing Director, The Consumer Goods Forum

Thank You!

Our Speakers

Nathalie ALQUIER, Chief Sustainability Officer, Danone

Jenny AYLWIN, Managing Director and Partner, Climate and Sustainability Consumer Leader EMESA, Boston Consulting Group

Sophie BAUER, Head of Food System Transformation, WWF-UK

Carsten BERTRAM, Head of Packaging Sustainability, Henkel Consumer Brands

Dr. Zahra BHOJANI, PhD, Sustainability and Enterprise Plastics Lead, Loblaw Companies Limited

Sylvie BORIAS, Director of Engagement and CSR, Bel Group

Josh BOTTOMLEY, Chief Executive Officer, dunhumby

Freya BURTON, Chief Sustainability Officer, LanzaTech

Stuart CHIDLEY, Co-Founder, Beauty Kitchen & Reposit

Paul CREWE, Chief Sustainability Officer & Executive Director, Anthesis Group

George DARRAH, Partner, Systemiq Capital

Sander DEFUYT, Lead of Strategy and Thought Leadership in the Plastics Initiative, Ellen MacArthur Foundation

Rachel ELLIOTT, General Manager Sustainability - Impact Narrative & Human Rights, Woolworths Group

Chris FRANKE, Senior Manager, Global Sustainability, Walmart

Greg S. GARRETT, Executive Director, ATNi (Access to Nutrition initiative)

Imke van GASSELT, VP Health & Sustainable Diets, Ahold Delhaize

Saif HAMEED, Founder and CEO, Altruistiq

Gerbrand HAVERKAMP, Executive Director, World Benchmarking Alliance

Estelle HERSZENHORN, Head of Food System Transformation, WRAP

Kasey HOOPER, Partner, Systemiq

Jean HORNAIN, CEO, CITEO

Archana JAGANNATHAN, Chief Sustainability Officer, PepsiCo Europe

Joseph JAMES, Sustainability Manager Forest Risk Commodities, Sainsbury's

Caroline JEAN, Partner, Bain & Company

Wendy KADON, Project Leader, Boston Consulting Group

Julia KOSKELLA, Director - Packaging Innovation & Reuse, SYSTEMIQ Ltd.

Isabelle KUMAR, Presenter and Journalist - Moderator

Justus LAUTEN, Founder, foodforecast

Kirsty MACDONALD, Principal, JamJar Investments

Virginie MAHIN, Senior Director, Global Social Sustainability, Mondelēz International

Richa MITTAL, Executive Vice President and Chief Innovation Officer, Fair Labor Association (FLA)

Christine MONTENEGRO McGRATH, Senior Vice President & Chief Impact & Sustainability Officer, Mondelēz International

Harry MORRISON, Partner, Sustainability & Responsibility, Bain & Company

Ken MURPHY, Group CEO, Tesco PLC

Jessica RIVAS, Director, Human Rights, McDonald's

Marija ROMPANI, Director of Ethics and Sustainability, John Lewis Partnership

Eloise SAVILL, Private Sector Adviser, Anti-Slavery International

Hein SCHUMACHER, CEO, Unilever

Grant SPRICK, VP Climate and Environment, Ahold Delhaize

Bertrand SWIDERSKI, Chief Sustainability Officer, Carrefour

Anna TAYLOR, Executive Director, The Food Foundation

Solitaire TOWNSEND, Chief Solutionist & Co-Founder, Futerra

Shalini UNNIKRISHNAN, Managing Director & Senior Partner, Boston Consulting Group

Wouter VERMEULEN, Vice President Sustainability & Public Policy Europe, The Coca-Cola Company

Michael A. VOICE, Partner, Sunridge Partners

Dorn WENNINGER, Advisor, Gardin

Ayla ZIZ, Chief Customer Officer, SVP Commercial Europe, Danone

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ONE PLANET. ONE HEALTH

The Consumer Goods Forum

About The Consumer Goods Forum

We are a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serve the consumer goods industry worldwide. Uniquely positioned as the organisation bringing consumer goods retailers, manufacturers, and their service providers together globally, the organisation is expertly placed to drive positive change across the industry to benefit both people and the planet and help members secure long-term, sustainable business growth.

theconsumergoodsforum.com



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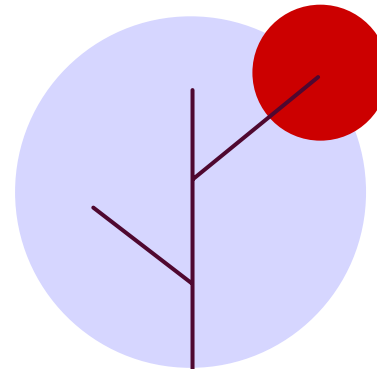
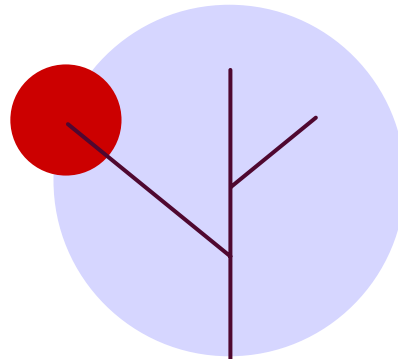
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US consumers are willing to pay a premium for sustainability



10%

more for products
with minimal
environmental
impact



15%

more for products
that are healthy

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Source: Bain Consumer Lab
ESG Survey 2024 (n=18,991)