2026 EDITION

Environmental & Social Marketing Claims: Business Case Overview

A Compendium of Over 50 High-Quality Publications, Illustrating the Business Opportunity of Better Green Claims

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GreencheqAI.com

About Greencheq

Greencheq is an AI-powered platform that helps organizations review, approve and manage environmental and social claims. It gives legal, sustainability and marketing teams a single place to check a claim before it is published, so companies can publish faster, with less risk, and without losing control as regulations, teams and claims scale.

WHY GREENCHEQ

A better claim review process

Generic AI will review green claims. Greencheq reviews them with the rigour regulators expect, then carries each claim through substantiation, approval, training, oversight and memory, so the next review starts stronger.

Save time | **Mitigate risk** | **Empower teams**

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Summary

Effective, accurate environmental and social claims create value in four ways. This document aggregates data across more than 50 reputable publications to ground the business case in real numbers.

1

Accelerated Growth

Products with credible sustainability claims grow faster and capture a disproportionate share of category growth.

2

Improved Margins

Substantiated claims support a price premium and lower price sensitivity than conventional products.

3

Customer Loyalty

Credible claims earn repeat purchase, while perceived greenwashing removes brands from consideration.

4

Risk Mitigation

Accurate, substantiated claims reduce exposure to turnover-based fines, litigation and reputational loss.

DOCUMENT PURPOSE

A sourced, quantitative case for making environmental and social marketing claims that are specific, accurate and substantiated. It draws on sales data, surveys, regulators and peer-reviewed research published since 2020. Every data point links back to its source.

INTENDED AUDIENCE

Marketing, sustainability, legal, and product leaders who need to make the internal case for integrating sustainability into the product portfolio and marketing.

BY THE NUMBERS

4	22	290+	52	2020
BUSINESS CASES	DATA PERSPECTIVES	DATA POINTS	SOURCES	PUBLISHED SINCE

Contents

1. Introduction

Companies increasingly face a two-sided question about environmental marketing: is it worth making environmental claims at all, and if so, how much does it matter that those claims are precise, substantiated, and compliant? Consumers say they care and will pay more, yet they also say they distrust most of what brands tell them.

Regulators around the world are moving from guidance to penalties. Buyers in B2B markets increasingly treat sustainability as a tie-breaker. The answer to both questions is yes. Now the evidence is not only quantitative but also centralized.

Purpose of this document

This document answers both questions with numbers. It assembles quantitative evidence from management consultancies, market-data firms, universities, regulators, and peer-reviewed journals published in 2020 or later into a compendium that highlights the business case for better green claims. Every data point is presented with its source, hyperlink, and year of publication. Full transparency. Full Traceability.

Key definitions

- **Environmental marketing (green) claim.** Any statement, symbol, logo or implied message in marketing that a component, product (service), packaging, process, site or company has an environmental benefit or a reduced environmental impact.
- **Social marketing claim.** Any statement, symbol, logo or implied message in marketing that a component, product (service), packaging, process, site or company has a social benefit or a positive social impact.

The four business cases for effective, accurate environmental and social marketing claims

The business case evidence structures into four distinct sources of value. Each is developed in its own section, with the supporting data points.

1 Accelerated Growth

Sustainability-marketed products now hold a quarter of US branded CPG dollar share and grow roughly five times faster than conventional products. Two independent datasets show they deliver about half of all category growth. Demand is not confined to consumers: half of B2B buyers already purchase more from sustainable suppliers, and more than 80% of US and European procurement decision makers say sustainability is at least sometimes the tie-breaker between competing suppliers.

2 Improved Margins

Sustainable products carry an average shelf premium of about 27% in US CPG. Consumers across multiple large surveys say they will pay 9–13% more. That gap between actual premium and stated tolerance is either pricing headroom to defend or volume to unlock, but it is only defensible when the claim behind it holds up.

3 Customer Loyalty

Brands whose sales are anchored in products with credible claims show higher repeat purchase rates. Conversely, more than half of consumers say they have encountered misleading sustainability information, only one in five believe brands represent their efforts accurately, and Kantar's research shows perceived greenwashing removes brands from consideration sets rather than merely lowering preference.

4 Risk Mitigation

The EU's Empowering Consumers Directive applies from 27 September 2026 with fines up to 4% of turnover. The UK CMA can now fine up to 10% of global turnover. The US FTC has used civil-penalty authority against major retailers; and US greenwashing class actions have passed 150 in number. Inside companies, 58% of executives concede their organization has overstated its sustainability efforts while only 36% have tools to measure them.

2. Accelerated Growth

Sales-data evidence comes first: these studies measure what consumers actually bought, using retail point-of-sale and household-panel data, rather than what they say they would buy.

Data Perspective 2.1: Market share in sales data

DATA POINT	VALUE	SOURCE	YEAR
Share of US branded CPG dollar sales held by sustainability-marketed products	**25.4%**	NYU Stern CSB × Circana, Sustainable Market Share Index 2025 (published April 2026).pdf)	2026
Year-over-year change in that share	**+1.6 pts**	NYU Stern × Circana, SMSI 2025	2026
Change in that share since 2013	**+10.8 pts**	NYU Stern × Circana, SMSI 2025	2026
Sustainability-marketed share of CPG market, UK	**36.8%**	NYU Stern × Circana, SMSI 2025 (2024 European analysis)	2026
Sustainability-marketed share of CPG market, Germany	**42.0%**	NYU Stern × Circana, SMSI 2025 (2024 European analysis)	2026
Share of new CPG product launches carrying a sustainability benefit, 2017	**28.1%**	NYU Stern × Circana, SMSI 2025 (innovation analysis)	2026
Share of new CPG product launches carrying a sustainability benefit, 2021	**48.1%**	NYU Stern × Circana, SMSI 2025 (innovation analysis)	2026
Categories (of 36) where sustainable products gained 10+ share points since 2013	**>50%**	NYU Stern × Circana, SMSI 2025	2026
Sustainability-marketed share of US CPG dollar sales, 2013 (peer-reviewed analysis of IRI scanner data; 71,283 products reviewed in 2018, 36 categories)	**14.3%**	Kronthal-Sacco, Van Holt, Atz and Whelan, *Journal of Sustainability Research* 2(2), e200016	2020
Sustainability-marketed share of US CPG dollar sales, 2018	**16.6%**	Kronthal-Sacco et al., *Journal of Sustainability Research*	2020

Data Perspective 2.2: Growth in sales data

DATA POINT	VALUE	SOURCE	YEAR
Five-year CAGR, sustainability-marketed CPG products	**10.9%**	NYU Stern × Circana, SMSI 2025 (press release)	2026
Five-year CAGR, conventional CPG products	**2.2%**	NYU Stern × Circana, SMSI 2025	2026
Five-year CAGR, total CPG market	**4.0%**	NYU Stern × Circana, SMSI 2025	2026
Growth multiple, sustainability-marketed vs. conventional	**~4.9×**	NYU Stern × Circana, SMSI 2025	2026

DATA POINT	VALUE	SOURCE	YEAR
Share of total US CPG growth delivered by sustainability-marketed products, 2013–2025 (from ~25% share)	**44.9%**	NYU Stern × Circana, SMSI 2025	2026
Five-year cumulative growth, products with ESG-related on-pack claims	**28%**	McKinsey × NielsenIQ, "Consumers care about sustainability and back it up with their wallets"	2023
Five-year cumulative growth, products without ESG-related on-pack claims	**20%**	McKinsey × NielsenIQ	2023
CAGR advantage of products with ESG claims	**1.7 pts**	McKinsey × NielsenIQ	2023
Share of category growth captured by products with ESG claims (from <50% of starting sales)	**56%**	McKinsey × NielsenIQ	2023
Share of 32 categories in which ESG-claim products outgrew peers	**~67%**	McKinsey × NielsenIQ	2023
Categories in which private-label products with ESG claims captured outsize growth	**88%**	McKinsey × NielsenIQ	2023
Categories in which the smallest brands with ESG claims outgrew peers	**59%**	McKinsey × NielsenIQ	2023
Categories in which the largest brands with ESG claims outgrew peers	**50%**	McKinsey × NielsenIQ	2023
Growth multiple, sustainability-marketed vs. conventionally marketed US CPG products, 2013–2018 (peer-reviewed analysis of IRI scanner data)	**5.6×**	Kronthal-Sacco, Van Holt, Atz and Whelan, *Journal of Sustainability Research* 2(2), e200016	2020
Five-year CAGR multiple, sustainability-marketed products vs. total CPG, 2013–2018	**3.3×**	Kronthal-Sacco et al., *Journal of Sustainability Research*	2020
Share of US CPG dollar growth, 2013–2018, contributed by sustainability-marketed products	**50.1%**	Kronthal-Sacco et al., *Journal of Sustainability Research*	2020
Growth in sustainability-marketed CPG dollar sales, 2013–2018 ($88B to $114B)	**+29%**	Kronthal-Sacco et al., *Journal of Sustainability Research*	2020

Data Perspective 2.3: Multiple claims and ecolabels

DATA POINT	VALUE	SOURCE	YEAR
Growth advantage of products with the least-common claims (e.g., "vegan")	**+8.5%**	McKinsey × NielsenIQ	2023
Growth advantage of products with medium-prevalence claims	**+4.7%**	McKinsey × NielsenIQ	2023
Growth advantage of products with the most-common claims	**~+2%**	McKinsey × NielsenIQ	2023
Growth of products carrying multiple ESG claims vs. a single claim	**~2×**	McKinsey × NielsenIQ	2023
Categories showing a positive correlation between number of claims and growth	**~80%**	McKinsey × NielsenIQ	2023
Overall effect of sustainability labels on real-world purchases (Cohen's *d*, bias-corrected; 49 experiments, 38 field studies)	**0.13**	Ding et al., meta-analysis, Research Square (preprint)	2025
Effect of sustainability labels on purchases, online shopping (Cohen's *d*, bias-corrected)	**0.20**	Ding et al., meta-analysis (preprint)	2025

DATA POINT	VALUE	SOURCE	YEAR
Effect of sustainability labels on purchases, physical retail (Cohen's *d*, bias-corrected)	**0.05**	Ding et al., meta-analysis (preprint)	2025
US CPG categories (of 36) in which sustainability-marketed products hold a stronger share online than in-store	**~75%**	NYU Stern CSB, Sustainable Market Share Index 2021 (updated April 2022)	2022
Sales of carbon-labeled US CPG products, 2021 (up from $1.7B in 2020)	**$3.4B**	NYU Stern CSB, SMSI 2021	2022
Share of category growth (2015–2019) delivered by green-chemistry-marketed products, from a 14.3% share (10 categories)	**62%**	NYU Stern CSB, SMSI 2021	2022
Growth multiple, green-chemistry-marketed vs. conventional products, 2015–2019 (4-yr CAGR 11.3% vs. 0.9%)	**12.6×**	NYU Stern CSB, SMSI 2021	2022
Appeal of a core product claim alone, in a MaxDiff test across seven US consumer brands (percent appeal)	**47**	NYU Stern CSB, "Social Sustainability Messages That Resonate"	2025
Appeal after adding one social sustainability message to the core claim	**62**	NYU Stern CSB, Social Sustainability Messages	2025
Appeal after adding a second social sustainability message	**70 (+23)**	NYU Stern CSB, Social Sustainability Messages	2025
Brands (of 7) for which a social sustainability claim was the single best-performing message	**3 of 7**	NYU Stern CSB, Social Sustainability Messages	2025
Consumers to whom sharing facts that explain why a product is more sustainable (e.g., "made using 50% less water") appeals (Canada, 1,008 consumers)	**54%**	Deloitte Canada, "Creating value from sustainable products"	2023
Consumers who find third-party certification seals (e.g., Fair Trade, Certified Organic) useful	**49%**	Deloitte Canada	2023
Consumers who find certification seals tied to a global standard useful	**55%**	Deloitte Canada	2023
Increase in sales in the 12 weeks after a product joins Amazon's Climate Pledge Friendly program (difference-in-differences, ~45,000 products, 3 categories)	**+12.5%**	Proserpio, Goli, Mangini, Lau and Yu, *International Journal of Research in Marketing* 43(2) (three authors Amazon-affiliated)	2025
Increase in gross merchandise sales in the 12 weeks after joining the program	**+13.3%**	Proserpio et al., *IJRM*	2025
Increase in shipped units in the 12 weeks after joining the program	**+4.4%**	Proserpio et al., *IJRM*	2025
Increase in product page visits after a product receives the Climate Pledge Friendly badge (synthetic difference-in-differences, one large seller's product data)	**+5.44%**	Chu, Long and Zhang, HKU Jockey Club ESGRI Paper 2025/016 (SSRN working paper)	2025
Increase in orders after a product receives the badge	**+3.46%**	Chu, Long and Zhang, SSRN	2025
Change in conversion rate after a product receives the badge (a 3.3% relative decline)	**–0.2 pts**	Chu, Long and Zhang, SSRN	2025
Effect of the badge on log sales rank (negative = better rank; 6,606 products, 8 categories, Mar–Sep 2023)	**–0.1041 (p<0.0001)**	Feng, Liu, Zhang and Srinivasan, SSRN working paper 4958107	2024
Share of products carrying the badge in the 6,606-product sample	**35.39%**	Feng et al., SSRN	2024

Data Perspective 2.4: Stated consumer demand

DATA POINT	VALUE	SOURCE	YEAR
Consumers who believe name-brand manufacturers should practice sustainability	**85%**	NYU Stern × Circana, SMSI 2025	2026
Year-over-year change in consumers who believe name-brand manufacturers should practice sustainability	**+5 pts**	NYU Stern × Circana, SMSI 2025	2026
Consumers who say they care deeply about sustainability (14,000+ consumers, 8 countries)	**80%**	Bain & Company, "Sustainability is not dead"	2025
Consumers who feel confident identifying sustainable options	**>60%**	Bain & Company	2025
Consumers buying more sustainable products to reduce environmental impact (20,000+ consumers, 31 countries)	**46%**	PwC Voice of the Consumer Survey 2024	2024
Consumers who assess production methods and recycling when judging a product's sustainability	**40%**	PwC Voice of the Consumer 2024	2024
Consumers who assess eco-friendly packaging when judging a product's sustainability	**38%**	PwC Voice of the Consumer 2024	2024
Consumers who assess impact on nature and water conservation when judging a product's sustainability	**34%**	PwC Voice of the Consumer 2024	2024
Gen Z consumers who say sustainability is more important to them than brand name (1,000+ respondents)	**75%**	First Insight × Wharton Baker Retailing Center	2021
Consumers who consider durability and repairability when buying (UK, 2,000+ adults)	**60%**	Deloitte UK, Sustainable Consumer 2024	2024
Consumers who would consider using repair services (UK)	**75%**	Deloitte UK, Sustainable Consumer 2024	2024
Consumers who expect businesses to make sustainable products the standard offering (UK)	**45%**	Deloitte UK, Sustainable Consumer 2024	2024
Consumers who say knowing a company is a leader in reducing its environmental impact improves their opinion of it (5,673 consumers, global)	**80%**	ERM Shelton, Global Eco Pulse 2025 (cited in B2B Pulse Fall 2025)	2025
Consumers who can name a product or brand they bought, or did not buy, because of the manufacturer's environmental or social record	**44%**	ERM Shelton, Global Eco Pulse 2025	2025
Consumers who have bought a product or service based on sustainability claims (Canada, 1,008 consumers)	**40%**	Deloitte Canada, "Creating value from sustainable products"	2023
Consumers who say, all things being equal, they are much more likely to purchase brands that offer green or sustainable products (Canada)	**75%**	Deloitte Canada	2023
Consumers who believe it is a brand's responsibility to create products that are not harmful to the Earth (Canada)	**94%**	Deloitte Canada	2023
US consumers who, choosing between two similar products under $10, would select the one that follows sustainable practices	**71%**	PDI Technologies, 2024 Sustainability, EV and Convenience Retail Survey (via NACS)	2024

Data Perspective 2.5: B2B demand

DATA POINT	VALUE	SOURCE	YEAR
B2B buyers who already purchase more from sustainable suppliers (750+ buyers, 6 sectors)	**50%**	Bain & Company, "Sustainability is not dead"	2025
B2B buyers planning to accelerate sustainable purchasing within three years	**~70%**	Bain & Company	2025
Business leaders at companies with above-peer revenue growth who expect sustainability to positively impact their business over three years	**90%**	Bain & Company	2025
US B2B buyers who say sustainability is sometimes or always a tie-breaker between competing suppliers or products (203 US senior procurement decision makers)	**83%**	ERM Shelton, "Winning in the Green Comms Recession: B2B Edition" (Global B2B Pulse 2025)	2025
European B2B buyers who say sustainability is sometimes or always a tie-breaker (232 European decision makers)	**85%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who say knowing a company leads in reducing its environmental impact would improve their opinion of it	**86%**	ERM Shelton, Global B2B Pulse 2025	2025
European B2B buyers who say the same	**79%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who rate a company with strong, consistently communicated sustainability commitments as one that "stands behind its products/services"	**82%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who do not expect suppliers to address any sustainability issue	**2%**	ERM Shelton, Global B2B Pulse 2025	2025
European B2B buyers who do not expect suppliers to address any sustainability issue	**3%**	ERM Shelton, Global B2B Pulse 2025	2025
Canadian companies that released a sustainable product or service and consider it a success (311 business leaders)	**75%**	Deloitte Canada, "Creating value from sustainable products"	2023
Of those, share citing success in profitability	**51%**	Deloitte Canada	2023
Of those, share citing success in revenue	**49%**	Deloitte Canada	2023
Organizations planning to increase environmental sustainability investment (2,146 executives, 716 organizations, 13 countries)	**82%**	Capgemini Research Institute, "A World in Balance 2025"	2025
Organizations that have already realized positive ROI on sustainability investments	**49%**	Capgemini Research Institute	2025
Executives citing business value creation (profitability, efficiency, cost savings) as a key reason for sustainability investment	**67%**	Capgemini Research Institute	2025

2.6 Top Takeaways: Accelerated Growth

- **The growth premium lives in specific, verifiable claims, not in the sustainability label as such.** The two sales datasets agree on direction but not size (roughly 5× in NYU/Circana versus 1.4× in McKinsey/NielsenIQ), which is best explained by NYU's stricter definition that excludes recyclability and generic "natural" claims.
- **A claim's commercial value decays as it becomes standard in a category.** The growth advantage is strongest for the claims fewest competitors make and weakest for the most common ones, so differentiation is a moving target that rewards continual substantiation of new, specific attributes.
- **Online, a badge works through visibility, not persuasion.** In-store label effects are near zero, but badged products on a major marketplace gained 12.5% in sales and 13.3% in GMV within 12 weeks while conversion fell 0.2 points and page visits rose 5.4%. The lift comes from placement and filters, not from shoppers reading substantiation at the point of choice. Substantiation is what keeps the badge, and the platform's trust, in place.
- **Layering substantive claims compounds appeal, and credibility comes from specific facts and recognized third-party seals.** NYU's messaging study shows a 23-point lift when one or two substantive claims are added to a core product message, mirroring the McKinsey data point that multiple-claim products grow about twice as fast, while Deloitte's Canadian data points to concrete facts (for example "50% less water") and global-standard certification as what makes a claim believable.
- **In B2B, sustainability has moved from differentiator to qualification criterion.** Fewer than 3% of procurement decision makers expect nothing on sustainability from suppliers, and challengers benefit most: private label and the smallest brands capture outsize growth from claims more often than the largest brands.

3. Improved Margins

Data Perspective 3.1: Observed price premiums

DATA POINT	VALUE	SOURCE	YEAR
Average price premium of sustainability-marketed US branded CPG products over conventional counterparts (2024 data)	**26.6%**	NYU Stern CSB × Circana, SMSI 2025.pdf)	2026
Decline in average premium since its 2018 peak	**12.9 pts**	NYU Stern × Circana, SMSI 2025	2026
Range of category-level premiums (some categories show discounts, others steep premiums)	**−47.2% to +167.7%**	NYU Stern × Circana, SMSI 2025	2026
US CPG categories (of 36) in which sustainability-marketed products showed lower price sensitivity than conventional products (2018 analysis)	**~67%**	NYU Stern CSB, Sustainable Market Share Index 2021 (updated April 2022)	2022
Year-over-year price increase, sustainability-marketed US CPG products, 2021	**3.17%**	NYU Stern CSB, SMSI 2021	2022
Year-over-year price increase, conventionally marketed US CPG products, 2021	**5.41%**	NYU Stern CSB, SMSI 2021	2022
Actual US green-product premium as cited by Bain (from NYU data)	**28%**	Bain & Company	2025
Effect of the Climate Pledge Friendly badge on log price, i.e., badged products sustain higher prices (6,606 products, 8 categories)	**+0.0535 ($p<0.0001$)**	Feng, Liu, Zhang and Srinivasan, SSRN working paper 4958107	2024

Data Perspective 3.2: Stated willingness to pay: consumers (B2C)

DATA POINT	VALUE	SOURCE	YEAR
Average premium consumers say they will pay for goods that meet specific environmental criteria (20,000+ consumers, 31 countries)	**9.7%**	PwC Voice of the Consumer Survey 2024	2024
Consumers willing to pay more for sustainably produced or sourced goods	**80%**	PwC Voice of the Consumer 2024	2024
Average premium consumers say they will pay for sustainability features (US)	**~9%**	NYU Stern × Circana, SMSI 2025	2026
Premium US consumers say they will pay for green products, on average	**≤13%**	Bain & Company	2025
Premium consumers say they will pay for sustainable products (global)	**12%**	Bain & Company, consumer survey	2023
Consumers willing to pay more for sustainable packaging (15,000+ consumers, US/Europe/S. America)	**74%**	Trivium Packaging × BCG, Buying Green Report	2020
Share of those consumers willing to pay 10% or more	**~25%**	Trivium Packaging × BCG	2020
Gen X consumers willing to spend 10% or more extra for sustainable products (1,000+ respondents)	**~90%**	First Insight × Wharton Baker Retailing Center	2021

DATA POINT	VALUE	SOURCE	YEAR
Gen X consumers willing to spend 10% or more extra, 2019 baseline	**>34%**	First Insight × Wharton	2021
Consumers across all generations willing to spend more for sustainable options, 2019 baseline	**58%**	First Insight × Wharton	2021
Canadian consumers willing to pay a premium of 20% or more for sustainable products (1,008 consumers)	**62%**	Deloitte Canada, "Creating value from sustainable products"	2023
Canadian consumers not willing to pay extra because it is hard to identify which products are genuinely sustainable	**46%**	Deloitte Canada	2023
US consumers willing to pay extra for a product with sustainable packaging (2,016 consumers)	**43%**	Shorr Packaging, 2025 Sustainable Packaging Consumer Report	2025
UK consumers willing to pay a premium for sustainable products	**36%**	Deloitte UK, Sustainable Consumer 2024	2024
UK consumers who have not taken sustainable actions because of cost	**61%**	Deloitte UK, Sustainable Consumer 2024	2024
UK consumers who had not taken sustainable actions because of cost, 2022	**52%**	Deloitte UK, Sustainable Consumer 2024	2024
Average premium consumers say they will pay for sustainable food products (meta-analysis of 80 studies)	**29.5%**	Li and Kallas, *Appetite* 163, 105239	2021
WTP premium for sustainable food in non-hypothetical (real-money) studies	**26.7%**	Li and Kallas, IAAE 2021 conference version of the *Appetite* meta-analysis	2021
WTP premium for sustainable food, North American studies	**25.5%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium for sustainable food, European studies	**31.9%**	Li and Kallas, IAAE 2021 conference version	2021

Data Perspective 3.3: Stated willingness to pay: business buyers (B2B)

DATA POINT	VALUE	SOURCE	YEAR
US B2B buyers who can recall their company paying more for a good or service because it, or its seller, was better for the environment	**58%**	ERM Shelton, "Winning in the Green Comms Recession: B2B Edition" (Global B2B Pulse 2025)	2025
European B2B buyers who can recall the same	**57%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who would pay a premium for a supplier's waste-reduction commitment (the most-cited premium-worthy attribute; 199 respondents)	**33%**	ERM Shelton, Global B2B Pulse 2025	2025

3.4 Top Takeaways: Improved Margins

- **The shelf premium is a diminishing asset, and the "gap" to stated tolerance depends on how you ask.** The observed premium has fallen almost 13 points since 2018. Broad consumer surveys put stated tolerance at 9–13%, but attribute-specific choice experiments (80-study meta-analysis) put it at 29.5%, and 26.7% in real-money studies, almost exactly the ~27% observed on shelf. The premium is defensible when the claim is specific and believed.
- **Specific attributes command the premium; generic ones earn the least.** Within the same meta-analysis, organic earns a 38.1% stated premium, fair trade 30.5% and animal welfare 29.5%, while the generic "environmentally friendly" attribute earns 21.3%, the lowest of the environmental claims. This is the margin-side mirror of the growth finding in 2.6 and of the EU ban on unqualified generic claims.
- **Sustainable products earn margin through demand resilience, not list price alone.** Lower price sensitivity and slower price increases during the 2021 inflation cycle show a resilience that is only available while the claim is believed.
- **Cost and doubt are separate barriers with different fixes.** UK consumers cite cost, while nearly half of Canadian consumers withhold the premium because they cannot tell which products are genuinely sustainable. Clearer substantiation unlocks the second group without touching price.
- **B2B willingness to pay is already realized rather than hypothetical.** A majority of buyers can recall paying more, and the attribute they will pay for (waste reduction) is operational and measurable rather than aspirational.

4. Customer Loyalty

Data Perspective 4.1: Credible claims and repeat purchase

DATA POINT	VALUE	SOURCE	YEAR
Repeat-purchase rate for brands with more than 50% of sales from ESG-claim products	**32–34%**	McKinsey × NielsenIQ	2023
Repeat-purchase rate for brands with less than 50% of sales from ESG-claim products	**<30%**	McKinsey × NielsenIQ	2023
Consumers who trust the brands they use (15,000 respondents, 15 countries)	**80%**	Edelman Trust Barometer Special Report: Brand Trust	2025
Consumers aged 61+ who would be less likely to buy from a brand that ignores its societal obligations	**60%**	Edelman Trust Barometer Special Report: Brand Trust	2025
Consumers who say sustainability is more important to them than two years earlier (beauty shoppers)	**62%**	NIQ, Trends in Sustainable Beauty 2023	2023

Data Perspective 4.2: The trust deficit: what inaccurate claims cost

DATA POINT	VALUE	SOURCE	YEAR
Consumers who believe brands accurately represent their sustainability efforts in marketing (5,000+ consumers, US/UK/France/Germany/ANZ)	**20%**	Blue Yonder, 2025 Consumer Sustainability Survey	2025
Canadian consumers who do not believe most "green" or sustainable claims brands make (1,008 consumers)	**57%**	Deloitte Canada, "Creating value from sustainable products"	2023
Canadian business leaders who believe the public has a significant level of trust in the authenticity of sustainability claims (311 leaders)	**71%**	Deloitte Canada	2023
Canadian consumers frustrated by how hard it is to separate authentic claims from those made to sell products	**23%**	Deloitte Canada	2023
Canadian consumers who do not think of sustainable products as "just marketing"	**93%**	Deloitte Canada	2023
US B2B buyers naming "provide transparency in operations" as a top-three way for suppliers to improve their image (the #1 answer)	**48%**	ERM Shelton, "Winning in the Green Comms Recession: B2B Edition" (Global B2B Pulse 2025)	2025
European B2B buyers naming transparency as a top-three way for suppliers to improve their image	**44%**	ERM Shelton, Global B2B Pulse 2025	2025
Consumers who believe companies are greenwashing (6,566 consumers, 13 countries)	**62%**	Capgemini Research Institute, "A World in Balance 2025"	2025

DATA POINT	VALUE	SOURCE	YEAR
Consumers who have seen or heard false or misleading sustainability information (26,000 interviews, 42 sectors, 33 countries)	**52%**	Kantar Sustainability Sector Index 2023	2023
Consumers who worry brands pursue social/environmental causes for commercial reasons	**67%**	Kantar Sustainability Sector Index 2023	2023
Consumers who believe brands offer meaningful environmental/social solutions	**36%**	Kantar Sustainability Sector Index 2023	2023
Consumers who find it hard to tell which products are good or bad for the environment	**57%**	Kantar Sustainability Sector Index 2023	2023
Consumers who think brands genuinely care about sustainability	**40%**	Kantar Sustainability Sector Index 2023	2023
Consumers who believe brands across industries mislead on sustainability	**>50%**	Kantar, "Concerns about greenwashing are pervasive across sectors"	2023
Consumers less likely to buy products in packaging they perceive as environmentally harmful	**~60%**	Trivium Packaging × BCG, Buying Green Report	2020
UK consumers who find sustainable choices inconvenient	**43%**	Deloitte UK, Sustainable Consumer 2024	2024
UK consumers who find sustainable choices complicated	**42%**	Deloitte UK, Sustainable Consumer 2024	2024
Corporate credibility rating when a company delivered exactly what it claimed (90% recycled paper; experiment N=256, Germany)	**4.90**	Koch and Denner, *Public Relations Review* 51(1), 102521	2025
Corporate credibility rating when actual performance was 86% against a 90% claim (a 4-point shortfall)	**3.45**	Koch and Denner, *Public Relations Review*	2025
Corporate credibility rating when actual performance was 54% against a 90% claim	**2.33**	Koch and Denner, *Public Relations Review*	2025
Corporate credibility rating when actual performance was 23% against a 90% claim	**1.99**	Koch and Denner, *Public Relations Review*	2025
Share of variance in credibility explained by the size of the claim–performance gap (η^2)	**0.52**	Koch and Denner, *Public Relations Review*	2025
Corporate image rating, no discrepancy vs. large discrepancy	**5.00 vs. 3.16**	Koch and Denner, *Public Relations Review*	2025
Share of variance in corporate image explained by the gap (η^2)	**0.31**	Koch and Denner, *Public Relations Review*	2025
Effect of greenwash on green trust (PLS-SEM; N=436, Vietnam)	**$\beta = -0.479$**	Ha, *PLOS ONE* 17(11) e0277421, Table 3	2022
Effect of greenwash on green brand image	**$\beta = -0.320$**	Ha, *PLOS ONE*	2022
Effect of perceived greenwashing on green brand authenticity (N=324 social media users with recent eco-labeled food purchases)	**$\beta = -0.28$**	Poulis, Theodoridis and Zacharatos, *Sustainability* 18(1) 451	2026
Indirect effect of perceived greenwashing on green purchase intention via authenticity and trust	**$\beta = -0.08$ ($p=0.002$)**	Poulis et al., *Sustainability*	2026

4.3 Top Takeaways: Customer Loyalty

- **The downside of an inaccurate claim is larger than the upside of an accurate one, and the damage runs through trust.** Credible claims add a few points of repeat purchase, but perceived greenwashing removes a brand from the consideration set entirely.
- **Executives overestimate public trust by a wide margin.** 71% of leaders believe the public trusts sustainability claims versus 20% of consumers who believe claims are accurate, so the internal case for substantiation is usually made against an optimistic baseline.
- **The problem to solve is trust, not demand.** Consumers are not cynical about sustainable products themselves (93% do not see them as "just marketing"); they are cynical about the claims.
- **Credibility collapses on even a small claim-performance gap.** In a controlled experiment, delivering 86% against a 90% claim cut corporate credibility from 4.90 to 3.45, nearly as far as delivering 54%, so precision in the stated number matters more than the size of the underlying effort.
- **Transparency is a loyalty tool, not a compliance cost.** B2B buyers name operational transparency as the single most effective reputational lever, which makes disclosed methodology and data a commercial asset.

5. Risk Mitigation

Data Perspective 5.1: The magnitude of the challenge

DATA POINT	VALUE	SOURCE	YEAR
Environmental claims examined in the EU that gave vague, misleading or unfounded information	**53%**	[European Commission, Green Claims (2020 Commission study)]	2020
Claims with no supporting evidence	**40%**	European Commission, Green Claims	2020
Sustainability labels in use in the EU	**230**	European Commission, Green Claims	2020
Green-energy labels in use in the EU	**100**	European Commission, Green Claims	2020
Share of green labels with weak or non-existent verification	**~50%**	European Commission, Green Claims	2020

DATA POINT	VALUE	SOURCE	YEAR
Websites (of ~500 reviewed globally) that appeared to use misleading green-claim tactics: vague terms such as "eco" or "sustainable," own-brand eco logos, omitted information	**40%**	ICPEN / UK CMA global sweep (UK government release)	2021

Data Perspective 5.2: Regulatory penalties

DATA POINT	VALUE	SOURCE	YEAR
EU: Minimum fine for widespread infringements of Directive (EU) 2024/825 (applies 27 September 2026)	**≥4% of turnover**	Cooley, EmpCo Directive briefing; Irish Dept. of Enterprise summary	2026
UK: Maximum CMA fine for misleading green claims under the DMCC Act 2024 (direct enforcement from 6 April 2025)	**≤10% of global turnover**	Provenance, DMCC Act summary; Jones Day; Linklaters	2024 / 2025
US: Total FTC civil penalties, two retailers, "bamboo" and "eco-friendly" claims on rayon textiles	**$5.5M**	FTC business blog	2022
US: FTC civil penalty, first retailer	**$2.5M**	FTC business blog	2022
US: FTC civil penalty, second retailer	**$3.0M**	FTC business blog	2022

Data Perspective 5.3: Private litigation (US)

DATA POINT	VALUE	SOURCE	YEAR
Greenwashing class actions filed since 2015	**>150**	TruthInAdvertising.org, "By the Numbers: Greenwashing Class-Action Lawsuits"	2025
Annual filings in 2020 (more than double the prior count of 7)	**17**	TruthInAdvertising.org	2025
Annual filings, 2021 onward	**>12/yr**	TruthInAdvertising.org	2025
Share of cases targeting home/garden products	**31%**	TruthInAdvertising.org	2025
Share of cases targeting food & beverage	**20%**	TruthInAdvertising.org	2025
Share of cases targeting personal care/cosmetics	**20%**	TruthInAdvertising.org	2025
Share of cases targeting clothing/textiles	**9%**	TruthInAdvertising.org	2025
Cases resolved (settled or dismissed), as of March 2025	**74%**	TruthInAdvertising.org	2025
Cases pending, as of March 2025	**26%**	TruthInAdvertising.org	2025
Settled cases	**35**	TruthInAdvertising.org	2025
Settled cases with disclosed terms	**15**	TruthInAdvertising.org	2025

DATA POINT	VALUE	SOURCE	YEAR
Settlements with disclosed terms that included monetary relief (of 15)	**14**	TruthInAdvertising.org	2025
Settlements with disclosed terms that required marketing changes (of 15)	**11**	TruthInAdvertising.org	2025
Cases filed in California	**70**	TruthInAdvertising.org	2025

Data Perspective 5.4: Inside companies: the substantiation gap

DATA POINT	VALUE	SOURCE	YEAR
Executives who say their organization is guilty of greenwashing (conveying a false impression or misleading information about sustainability)	**58%**	Google Cloud × The Harris Poll, "CEOs are Ready to Fund a Sustainable Transformation"	2022
North American executives who believe their organization has overstated its sustainability efforts	**72%**	Google Cloud × The Harris Poll	2022
US executives who admit their company is guilty of greenwashing (reported by Fast Company from the same survey; not in the public report, which gives 72% for North America)	**68%**	Fast Company, "68% of U.S. execs admit their companies are guilty of greenwashing"	2022
Executives who rate their organization above average on environmental sustainability	**80%**	Google Cloud × The Harris Poll	2022
Executives who question how genuine some of their organization's sustainability initiatives are	**66%**	Google Cloud × The Harris Poll	2022
Executives whose organization has measurement tools in place to quantify sustainability efforts	**36%**	Google Cloud × The Harris Poll	2022
Executives using measurement data to optimize sustainability strategy	**17%**	Google Cloud × The Harris Poll	2022
Executives who want to advance sustainability efforts but do not know how	**65%**	Google Cloud × The Harris Poll	2022
Canadian business leaders who feel at risk of greenwashing accusations if they pursue sustainability goals	**41%**	Deloitte Canada, "Creating value from sustainable products"	2023
Canadian companies that rely on third-party certification to authenticate the benefits of their sustainable products	**40%**	Deloitte Canada	2023

Data Perspective 5.5: Investor reaction to greenwashing

DATA POINT	VALUE	SOURCE	YEAR
Average abnormal stock return following public disclosure of a greenwashing incident (event study, almost 10,000 incidents, global)	**−0.63%**	Akyildirim, Corbet, Ongena and Oxley, Swiss Finance Institute Research Paper 23-90 (SSRN, revised 2024)	2024

5.6 Top Takeaways: Risk Mitigation

- **Penalty exposure has changed shape, not just size.** EU and UK fines now scale with turnover, so the same vague claim costs a large company orders of magnitude more than it did under fixed-sum regimes.
- **The claims regulators are banning are the same claims that earn the least growth in the sales data.** Generic terms, unverified labels and offset-based neutrality claims are commercial dead weight as well as legal exposure, so removing them is an improvement on both fronts.
- **Private litigation is now a steadier risk than regulatory action.** Filings have run above a dozen a year since 2020, most settle with marketing changes attached, and the categories targeted (home and garden, food, personal care) are those where claims are most common.
- **Markets price greenwashing immediately, if modestly.** Public disclosure of a greenwashing incident is followed by an average abnormal stock return of about −0.63% across almost 10,000 incidents, a cost that lands before any regulator acts.
- **Most companies are making claims they cannot yet substantiate with data, and that is precisely the gap regulators, litigants and skeptical buyers are probing.** An 80% above-average self-rating sits alongside a 58% admission of greenwashing, with only 36% holding measurement tools; the missing ingredient is data infrastructure, which is the cheapest part of the exposure to close.

6. Product Category Insights

Data Perspective 6.1: General CPG (US)

DATA POINT	VALUE	SOURCE	YEAR
Categories with the highest sustainable share: fresh bread, vitamins, soup, floor cleaner, coffee, paper napkins, sanitary napkins, laundry detergent, natural cheese	**>20%**	NYU Stern CSB × Circana, SMSI 2025.pdf)	2026
Categories in the mid-range: laundry care, household cleaners, frozen dinners, energy drinks, diapers, toothpaste, skincare, yogurt, soap, milk, paper towels, toilet tissue, cereal, cups and plates, deodorant, facial tissue, salty snacks, crackers, dish detergent, bottled juice, weight control	**5–20%**	NYU Stern × Circana, SMSI 2025	2026
Categories with the lowest sustainable share: pet food, carbonated beverages, chocolate candy, cookies, pet treats, food and trash bags	**<5%**	NYU Stern × Circana, SMSI 2025	2026
Range of category price premiums for sustainable vs. conventional	**–47.2% to +167.7%**	NYU Stern × Circana, SMSI 2025	2026
Share of sustainable CPG dollars spent by Baby Boomers	**33%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars spent by Gen X	**31%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars spent by Millennials	**30%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars spent by Seniors and Retirees	**6%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars from upper-income households	**41%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars from middle-income households	**38%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026
Share of sustainable CPG dollars from lower-income households	**21%**	NYU Stern × Circana, SMSI 2025 (2023 analysis)	2026

Data Perspective 6.2: Food and beverage

DATA POINT	VALUE	SOURCE	YEAR
Food categories (of 15) in which ESG-claim products showed outsize growth	**11 of 15**	McKinsey × NielsenIQ	2023
Beverage categories (of 9) in which ESG-claim products showed outsize growth	**2 of 9**	McKinsey × NielsenIQ	2023
Label effect on real-world purchases, food products (Cohen's *d*)	**0.23**	Ding et al., meta-analysis (preprint)	2025
Label effect on real-world purchases, grocery products generally (Cohen's *d*)	**0.17**	Ding et al., meta-analysis (preprint)	2025
Consumers planning to eat more fresh fruit and vegetables	**52%**	PwC Voice of the Consumer 2024	2024

DATA POINT	VALUE	SOURCE	YEAR
Consumers planning to reduce red meat consumption	**22%**	PwC Voice of the Consumer 2024	2024
Canadian consumers for whom sustainability claims were a factor in buying grocery items	**65%**	Deloitte Canada, "Creating value from sustainable products"	2023
2021 price premium of sustainability-marketed vs. conventional products, coffee (US)	**54%**	NYU Stern CSB, Sustainable Market Share Index 2021 (updated April 2022)	2022
2021 price premium, yogurt (US)	**50%**	NYU Stern CSB, SMSI 2021	2022
2021 price premium, cereal (US)	**42%**	NYU Stern CSB, SMSI 2021	2022
2021 price premium, milk (US)	**15%**	NYU Stern CSB, SMSI 2021	2022
2021 price premium, carbonated beverages (US)	**136%**	NYU Stern CSB, SMSI 2021	2022
Greenwashing concern, meat and meat products	**58%**	Kantar, Sustainability Sector Index 2023	2023
Share of US greenwashing class actions targeting food & beverage	**20%**	TruthInAdvertising.org	2025
WTP premium for sustainable food, organic attribute (meta-analysis of 80 studies)	**38.1%**	Li and Kallas, IAAE 2021 conference version of the *Appetite* meta-analysis	2021
WTP premium, fair-trade attribute	**30.5%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, animal-welfare attribute	**29.5%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, environmentally friendly attribute	**21.3%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, local attribute	**21.1%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, fruit and vegetables	**38.8%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, dairy	**34.9%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, meat	**29.4%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, drinks	**25.3%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium, seafood	**16.6%**	Li and Kallas, IAAE 2021 conference version	2021
WTP premium for eco-labeled foods (meta-analysis of 35 discrete-choice experiments, n=35,725)	**3.79 PPP$/kg**	Bastounis et al., *Nutrients* 13(8) 2677	2021
WTP premium for eco-labeled meat and dairy	**9.24 PPP$/kg**	Bastounis et al., *Nutrients*	2021
WTP premium for eco-labeled seafood	**2.71 PPP$/kg**	Bastounis et al., *Nutrients*	2021
WTP premium for eco-labeled fruit, vegetables and nuts	**0.72 PPP$/kg**	Bastounis et al., *Nutrients*	2021
Reduction in probability of choosing a high-carbon meal after carbon footprint labels were introduced (field experiment, 5 university cafeterias, 80,000+ meal choices)	**–2.7 pts**	Lohmann, Gsottbauer, Doherty and Kontoleon, *Journal of Environmental Economics and Management* 114	2022
Reduction in average carbon emissions per meal after labels were introduced	**–4.3%**	Lohmann et al., *JEEM*	2022

DATA POINT	VALUE	SOURCE	YEAR
Reduction in food-related carbon footprint from carbon information, best-performing format (monetary "environmental cost" units with traffic-light colors; pre-registered field experiment)	**≤–9.2%**	Beyer et al., *Journal of Accounting Research* 62(1), 101–136	2024
Reduction in carbon emissions from carbon labels in a student cafeteria (three field experiments; ~125,000 purchases)	**~–4%**	Schulze-Tilling (Bocconi University), CRC TR 224 Discussion Paper 639	2025
Carbon tax per ton that would be needed to achieve the same reduction through price changes alone	**€120**	Schulze-Tilling, CRC TR 224	2025
Shift from meat to vegetarian meals after carbon labels in worksite call-center cafeterias (4,068 meals; no significant change in average cafeteria emissions)	**+1.5 pts (p=0.034)**	Lowrie and Lohmann, *Behavioural Public Policy*, FirstView	2025
First-week shift from meat to vegetarian meals in the same worksite-cafeteria experiment	**+5.0 pts (p=0.042)**	Lowrie and Lohmann, *Behavioural Public Policy*	2025
Reduction in environmental impact score of baskets when products carried a four-indicator environmental label (UK online-supermarket RCT, N=1,051)	**–3.9 percentiles**	Potter et al., *PLOS ONE* 19(9) e0309386	2024
Reduction in basket greenhouse-gas indicator vs. control, across three label formats	**–13.9% to –14.8%**	Potter et al., *PLOS ONE*	2024
Reduction in basket water-use indicator vs. control, across three label formats	**–18.9% to –25.9%**	Potter et al., *PLOS ONE*	2024

Data Perspective 6.3: Beauty and personal care

DATA POINT	VALUE	SOURCE	YEAR
Personal care categories (of 4) in which ESG-claim products showed outsize growth	**3 of 4**	McKinsey × NielsenIQ	2023
Dollar growth, beauty products with "compostable" claim (market and period not specified by NIQ)	**+30.9%**	NIQ, Trends in Sustainable Beauty 2023	2023
Dollar growth, "cruelty-free" claim	**+18.1%**	NIQ, Trends in Sustainable Beauty 2023	2023
Dollar growth, "plastic-free" claim	**+12.2%**	NIQ, Trends in Sustainable Beauty 2023	2023
Growth in "refillable" search queries	**+64%**	NIQ, Trends in Sustainable Beauty 2023	2023
Beauty consumers saying sustainability is more important than two years ago	**62%**	NIQ, Trends in Sustainable Beauty 2023	2023
Canadian consumers for whom sustainability claims were a factor in buying personal care items	**56%**	Deloitte Canada, "Creating value from sustainable products"	2023
CAGR of beauty and personal care product launches carrying ethical and sustainable claims, July 2021 to June 2026 (Innova launch database; launch counts, not sales)	**15%**	Personal Care Insights (Innova Market Insights data), "Eco-conscious cosmetics"	2026
2021 price premium of sustainability-marketed vs. conventional products, toothpaste (US)	**41%**	NYU Stern CSB, Sustainable Market Share Index 2021 (updated April 2022)	2022
2021 price premium, deodorant (US)	**39%**	NYU Stern CSB, SMSI 2021	2022

DATA POINT	VALUE	SOURCE	YEAR
2021 price premium, skincare (US; sustainable products priced below conventional)	**–37%**	NYU Stern CSB, SMSI 2021	2022
Share of sustainability-marketed soap sales carrying a "phthalate free" claim, 2015–2019	**68%**	NYU Stern CSB, SMSI 2021	2022
Share of sustainability-marketed skincare sales carrying a "paraben free" claim, 2015–2019	**61%**	NYU Stern CSB, SMSI 2021	2022
Greenwashing concern, pet food and baby hygiene	**>40%**	Kantar, Sustainability Sector Index 2023	2023
Share of US greenwashing class actions targeting personal care/cosmetics	**20%**	TruthInAdvertising.org	2025

Data Perspective 6.4: Household, cleaning, and home & garden

DATA POINT	VALUE	SOURCE	YEAR
Household categories with high sustainable share: floor cleaner, laundry detergent, paper napkins	**>20%**	NYU Stern × Circana, SMSI 2025.pdf)	2026
Household categories with low sustainable share: food and trash bags	**<5%**	NYU Stern × Circana, SMSI 2025	2026
Canadian consumers for whom sustainability claims were a factor in buying home care items	**51%**	Deloitte Canada, "Creating value from sustainable products"	2023
2021 price premium of sustainability-marketed vs. conventional products, household cleaner (US)	**36%**	NYU Stern CSB, Sustainable Market Share Index 2021 (updated April 2022)	2022
2021 price premium, laundry detergent (US)	**19%**	NYU Stern CSB, SMSI 2021	2022
2021 price premium, floor cleaners (US)	**34%**	NYU Stern CSB, SMSI 2021	2022
Share of sustainability-marketed laundry detergent sales carrying a "plant based" claim, 2015–2019	**86%**	NYU Stern CSB, SMSI 2021	2022
Share of sustainability-marketed household cleaner sales carrying a "plant based" claim, 2015–2019	**29%**	NYU Stern CSB, SMSI 2021	2022
Share of US greenwashing class actions targeting home/garden products (largest category)	**31%**	TruthInAdvertising.org	2025

Data Perspective 6.5: Apparel, textiles, and fashion

DATA POINT	VALUE	SOURCE	YEAR
Greenwashing concern, clothing and footwear	**57%**	Kantar, Sustainability Sector Index 2023	2023
Value–action gap (intent vs. behavior), clothing and footwear	**63%**	Kantar, Sustainability Sector Index 2023	2023

DATA POINT	VALUE	SOURCE	YEAR
FTC civil penalties for "bamboo"/"eco-friendly"/"sustainable" claims on rayon textiles (two major US retailers)	**$5.5M**	FTC	2022
Maximum CMA fine for misleading green claims, applicable to fashion retailers following the CMA's 2024 undertakings from three fashion retailers	**10% of global turnover**	Jones Day; Linklaters	2024
Canadian consumers for whom sustainability claims were a factor in buying apparel	**53%**	Deloitte Canada, "Creating value from sustainable products"	2023
Gen Z consumers who say sustainability is more important to them than brand name	**75%**	First Insight × Wharton	2021
Share of US greenwashing class actions targeting clothing/textiles	**9%**	TruthInAdvertising.org	2025

Data Perspective 6.6: Packaging

DATA POINT	VALUE	SOURCE	YEAR
Consumers willing to pay more for sustainable packaging	**74%**	Trivium Packaging × BCG, Buying Green Report	2020
Share of those consumers willing to pay 10% or more	**~25%**	Trivium Packaging × BCG	2020
Consumers willing to pay more for sustainable packaging (9,000+ consumers)	**82%**	Trivium Packaging × Euromonitor, 2023 Buying Green Report	2023
Consumers who chose a product in the last six months based on its sustainability credentials	**71%**	Trivium Packaging × Euromonitor	2023
Consumers who identify unclear labeling as the biggest barrier to purchase	**46%**	Trivium Packaging × Euromonitor	2023
Consumers citing environmentally friendly, recyclable packaging as important	**>66%**	Trivium Packaging × BCG	2020
Consumers less likely to buy products in packaging they perceive as harmful	**~60%**	Trivium Packaging × BCG	2020
Consumers less likely to buy products in packaging they perceive as harmful	**63%**	Trivium Packaging × Euromonitor	2023
US consumers willing to pay extra for a product with sustainable packaging (2,016 consumers)	**43%**	Shorr Packaging, 2025 Sustainable Packaging Consumer Report	2025
Consumers assessing eco-friendly packaging when judging sustainability	**38%**	PwC Voice of the Consumer 2024	2024
Consumers rating sustainable packaging as very or somewhat important	**73%**	First Insight × Wharton	2021
Consumers rating sustainable packaging as very or somewhat important, 2019 baseline	**58%**	First Insight × Wharton	2021
Dollar growth of "plastic-free" beauty products	**+12.2%**	NIQ	2023
Dollar growth of "compostable" beauty products	**+30.9%**	NIQ	2023

Data Perspective 6.7: B2B and industrial

DATA POINT	VALUE	SOURCE	YEAR
B2B buyers already purchasing more from sustainable suppliers (750+ buyers, 6 sectors)	**50%**	Bain & Company	2025
B2B buyers planning to accelerate sustainable purchasing within three years	**~70%**	Bain & Company	2025
US B2B buyers who say sustainability is sometimes or always a tie-breaker between competing suppliers (203 respondents; technology, retail, financial services, consumer goods, chemicals/metals/plastics)	**83%**	ERM Shelton, "Winning in the Green Comms Recession: B2B Edition" (Global B2B Pulse 2025)	2025
European B2B buyers who say the same (232 respondents)	**85%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who can recall paying more for a good or service because it was better for the environment	**58%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who want suppliers to measure, support or report on waste reduction (the most-requested topic)	**55%**	ERM Shelton, Global B2B Pulse 2025	2025
US B2B buyers who want suppliers to report on carbon/GHG reduction	**43%**	ERM Shelton, Global B2B Pulse 2025	2025
Canadian retail leaders who felt R&D for sustainable products was costlier than for regular products	**93%**	Deloitte Canada, "Creating value from sustainable products"	2023
Canadian manufacturing leaders who felt the same	**89%**	Deloitte Canada	2023
Value–action gap (intent vs. behavior), oil and gas	**66%**	Kantar, Sustainability Sector Index 2023	2023
Value–action gap (intent vs. behavior), electric vehicles	**50%**	Kantar, Sustainability Sector Index 2023	2023
Consumers purchasing, or planning to purchase, an electric vehicle	**24%**	PwC Voice of the Consumer 2024	2024

6.8 Top Takeaways: Product Category Insights

- **Category maturity shapes the opportunity.** Where sustainable share is already high (bread, coffee, detergent), claims are table stakes and the premium is under pressure. Where share is low (pet food, soft drinks, confectionery) the first credible mover faces little competition for the claim.
- **Price and growth do not move together at category level.** Beverages are the outlier: green claim products outgrew peers in only 2 of 9 beverage categories, yet carbonated beverages carry the highest observed premium (136%).
- **The dominant personal care and household claims are the ones most exposed to the EU ban on unqualified generic language.** Ingredient-absence claims ("phthalate free", "paraben free", "plant based") account for the majority of sustainable sales in those categories.
- **Impact labels shift food choices modestly, and format matters more than presence.** Carbon labels cut high-carbon meal choices by 2.7 points and emissions by about 4%, rising to 9.2% for the best format (monetary "environmental cost" with traffic-light colors), equal to what a €120 per ton carbon tax would achieve, but the effect fades after the first week. Online again does better (basket emissions −14%, water use −19% to −26% in a UK RCT), while packaging, the most-cited attribute in surveys, produces the weakest in-store label effect.
- **The sustainable CPG buyer is older and wealthier than the marketing narrative suggests.** Boomers and Gen X together account for nearly two-thirds of sustainable dollars, and upper-income households for 41%.

7. References

#	SOURCE	PUBLISHER TYPE	YEAR	LINK
1	Sustainable Market Share Index™ 2025	NYU Stern Center for Sustainable Business × Circana (university / market data)	2026	PDF.pdf) · Press release
2	Consumers care about sustainability and back it up with their wallets	McKinsey & Company × NielsenIQ (consultancy / panel data)	2023	Link
3	Trends in Sustainable Beauty 2023	NielsenIQ (market data)	2023	Link
4	Voice of the Consumer Survey 2024	PwC (consultancy survey)	2024	Link
5	Sustainability is not dead: CEOs, consumers and B2B buyers continue to act sustainably	Bain & Company (consultancy survey)	2025	Link
6	Consumers say their environmental concerns are increasing due to extreme weather	Bain & Company (consultancy survey)	2023	Link
7	Buying Green Report	Trivium Packaging × Boston Consulting Group (industry / consultancy survey)	2020	Link
8	2023 Buying Green Report	Trivium Packaging × Euromonitor International (industry / market research survey)	2023	Link
9	The State of Consumer Spending: Gen Z Influencing All Generations	First Insight × Wharton Baker Retailing Center (industry / university survey)	2021	Link
10	The Sustainable Consumer 2024	Deloitte UK (consultancy survey)	2024	Link
11	A meta-analysis of the real-world impact of sustainability labeling on consumer choices	Ding et al., Research Square (preprint, not yet peer-reviewed)	2025	Link
12	A World in Balance 2025: Unlocking resilience and long-term value through environmental action	Capgemini Research Institute (consultancy survey)	2025	Link
13	Sustainability Sector Index 2023	Kantar (market research)	2023	Press release · Analysis
14	Trust Barometer Special Report: Brand Trust	Edelman (market research)	2025	Link
15	Green Claims	European Commission (regulator)	2020 study / 2023 proposal	Link · COM(2023) 166
16	Global sweep finds 40% of firms' green claims could be misleading	ICPEN / UK Competition and Markets Authority (regulator)	2021	ICPEN · gov.uk
17	$5.5 million total FTC settlements with two retailers challenge "bamboo" and eco claims	US Federal Trade Commission (regulator)	2022	Link
18	By the Numbers: Greenwashing Class-Action Lawsuits	TruthInAdvertising.org (non-profit consumer advocate)	2025	Link
19	Empowering Consumers for the Green Transition Directive briefing	Cooley LLP (law firm)	2026	Link

#	SOURCE	PUBLISHER TYPE	YEAR	LINK
20	Directive (EU) 2024/825 summary	Irish Department of Enterprise, Tourism and Employment (government)	2024	Link
21	Heightened scrutiny of green claims in the EU and Switzerland	Sidley Austin LLP (law firm)	2025	Link
22	DMCC Act: the CMA's new powers to fine 10% of global revenue	Provenance (industry)	2025	Link
23	The UK CMA takes action against allegedly misleading environmental claims	Jones Day (law firm)	2024	Link
24	CMA sets out green compliance standard for the fashion sector	Linklaters (law firm)	2024	Link
25	Climate and carbon litigation trends	Harvard Law School Forum on Corporate Governance	2025	Link
26	Navigating the new rise of greenwashing litigation	Baker McKenzie (law firm)	2024	Link
27	Winning in the Green Comms Recession: B2B Edition (Global B2B Pulse 2025; 435 senior procurement decision makers, US and Europe, July 2025)	ERM Shelton (sustainability marketing communications firm)	2025	Link
28	Sustainable Market Share Index™ 2021 Report (Kronthal-Sacco and Whelan; updated April 2022)	NYU Stern Center for Sustainable Business × IRI (university / market data)	2022	PDF
29	Social Sustainability Messages That Resonate (Kronthal-Sacco and Whelan; MaxDiff study, seven US brands, late 2024 to early 2025)	NYU Stern Center for Sustainable Business (university)	2025	Press release
30	Creating value from sustainable products: How business purpose and brand trust can make the difference (311 business leaders, 1,008 consumers, Canada, April 2023)	Deloitte Canada (consultancy survey)	2023	Press release
31	CEOs are Ready to Fund a Sustainable Transformation (1,491 executives, 16 markets, Dec 2021 to Jan 2022)	Google Cloud × The Harris Poll (corporate research)	2022	Report PDF · Google Cloud blog
32	68% of U.S. execs admit their companies are guilty of greenwashing (Adele Peters, reporting the Google Cloud/Harris Poll survey)	Fast Company (business press)	2022	Link
33	2025 Consumer Sustainability Survey (5,000+ consumers, five markets, February 2025)	Blue Yonder (corporate research)	2025	Link
34	Sustainability, EV and Convenience Retail Survey Report (reported by NACS)	PDI Technologies (corporate research)	2024	Link
35	2025 Sustainable Packaging Consumer Report (2,016 US consumers, Nov to Dec 2024)	Shorr Packaging (industry research)	2025	Link
36	Eco-conscious cosmetics (Innova Market Insights launch data)	Personal Care Insights / CNS Media (trade press)	2026	Link
37	Green Marketing in 2025: Definition and Strategies (Brinda Gulati; vendor article used only as a pointer to references 4, 28, 33, 34 and 35, each verified against its original source)	Shopify (vendor blog)	2025	Link

#	SOURCE	PUBLISHER TYPE	YEAR	LINK
38	Sustainability-marketed products: growth and share in US CPG, 2013–2018	Kronthal-Sacco, Van Holt, Atz and Whelan, *Journal of Sustainability Research* (peer-reviewed)	2020	Link
39	The effect of sustainability badges on online sales (Climate Pledge Friendly)	Proserpio, Goli, Mangini, Lau and Yu, *International Journal of Research in Marketing* (peer-reviewed; three authors Amazon-affiliated)	2025	SSRN
40	Climate Pledge Friendly badge effects on traffic, orders and conversion	Chu, Long and Zhang, HKU Jockey Club ESGRI / SSRN (working paper)	2025	SSRN
41	Sustainability badges, sales rank and price	Feng, Liu, Zhang and Srinivasan, SSRN (working paper)	2024	SSRN
42	Carbon footprint labels and meal choices in university cafeterias	Lohmann, Gsottbauer, Doherty and Kontoleon, *Journal of Environmental Economics and Management* (peer-reviewed)	2022	Link
43	Carbon information formats and food choices (pre-registered field experiment)	Beyer, Chaskel, Euler, Gassen, Großkopf and Sellhorn, *Journal of Accounting Research* (peer-reviewed)	2024	SSRN
44	Carbon labels in a student cafeteria: three field experiments	Schulze-Tilling (Bocconi University), CRC TR 224 Discussion Paper 639 (working paper)	2025	PDF
45	Do carbon labels encourage sustainable food choices? Evidence from call-center worksite cafeterias	Lowrie and Lohmann, *Behavioural Public Policy* (peer-reviewed)	2025	Link
46	Environmental impact labels in an online supermarket (RCT)	Potter et al., *PLOS ONE* (peer-reviewed)	2024	Link
47	Meta-analysis of consumer willingness to pay for sustainable food products	Li and Kallas, *Appetite* (peer-reviewed); subgroup figures from the IAAE 2021 conference version	2021	Abstract · Conference PDF
48	Willingness to pay for eco-labeled foods: meta-analysis of discrete-choice experiments	Bastounis et al., *Nutrients* (peer-reviewed)	2021	Link
49	Claim-performance gaps and corporate credibility (experiment)	Koch and Denner, *Public Relations Review* (peer-reviewed)	2025	Link
50	Greenwash, green trust and green brand image (PLS-SEM)	Ha, *PLOS ONE* (peer-reviewed)	2022	Link
51	Perceived greenwashing, brand authenticity and purchase intention	Poulis, Theodoridis and Zacharatos, *Sustainability* (peer-reviewed)	2026	Link
52	Stock market reaction to greenwashing incidents (event study)	Akyildirim, Corbet, Ongena and Oxley, Swiss Finance Institute Research Paper 23-90 (working paper)	2024	SSRN

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