

THE PATH TO PRODUCT SUSTAINABILITY

A **pure**
STRATEGIES
REPORT



pure
INSIGHT

About Pure Strategies

For more than 15 years, Pure Strategies has helped clients attain financial and strategic benefits from improving the sustainability of their organizations, products, and supply chains.

Our work enables companies to set meaningful sustainability goals, develop effective strategies, and implement proactive changes. We're in this business to make a difference, and have had the privilege of helping forward-looking companies make deep improvements in their organizations, approaches, innovation pipelines, and partner relationships. Our clients include Walmart, The North Face, Annie's Homegrown, RB, Rockline Industries, Radio Flyer, Seventh Generation, Organic Valley, and others.

As a part of our work, Pure Strategies delivers thoughtful research and analysis to help companies advance their sustainability programs. This report brings readers the results of research conducted by Pure Strategies and is aimed to deliver *pureInsight*.

Learn more or contact us at purestrategies.com.

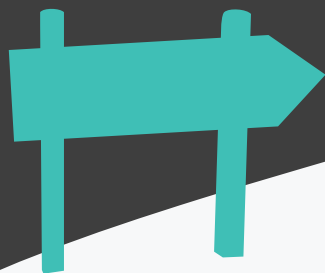
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THE PATH TO PRODUCT SUSTAINABILITY

A Pure Strategies Report

Why are some companies reaping financial and organizational benefits from their product sustainability efforts while others lag behind? We surveyed 100 global food and beverage, apparel and footwear, home and personal care, toy, and electronics companies involved in product sustainability and talked to heads, directors, and managers of sustainability from leading companies such as Aveda, Timberland, Henkel, RB, Seagate, General Mills, and The Coca-Cola Company about their efforts to uncover best practices.



Product sustainability encompasses initiatives that measure, improve, and disclose the environmental and social impacts of products across their life cycle, from raw materials, packaging, and manufacture through to product use and end-of-life disposal. The various facets of product sustainability differ across industries and companies. For example, raw material sourcing is critical for foods while product energy consumption is relevant to electronics. Examples include:

Aveda

Aveda's products are made without ingredients of concern such as parabens, phthalates, and sodium lauryl sulfate. At least 90% of the herbal ingredients and essential oils are from organic sources, with key ingredients traceable to the source to ensure fair compensation.

Coca-Cola

The Coca-Cola Company's PlantBottle™ packaging is made from plant-based, renewable materials that can be recycled just like traditional PET plastic.

Seagate

Seagate's digital storage solutions are made with fewer hazardous substances and optimize power management to conserve product energy use.

Timberland

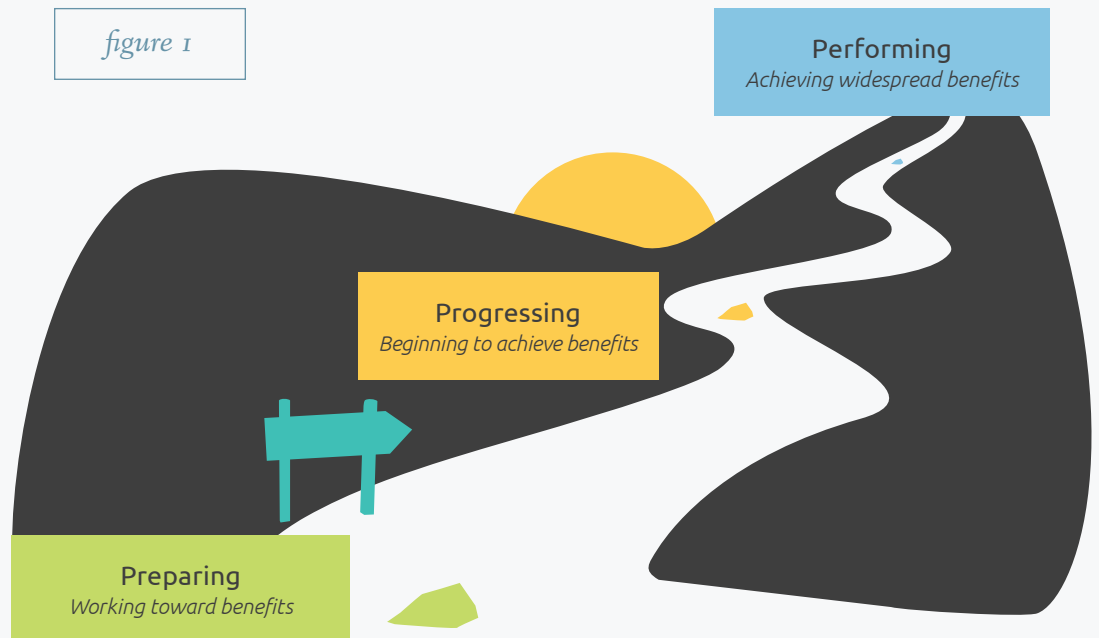
Timberland puts as many responsible materials as possible into its footwear and apparel products such as recycled plastic and rubber and organic cotton. This includes creating its own materials such as ReCanvas™ fabric, a material with the look and feel of cotton canvas that is made from 100% recycled PET, and recycled nylon from fishing nets.

Introduction

Just over 70% of consumer product companies engaging in product sustainability have realized business value from their efforts. Benefits include reduced costs, improved employee engagement and productivity, and increased trust and brand enhancement. Our study of companies involved in product sustainability revealed these promising outcomes, highlighting a reason for the growing corporate commitment to sustainability.¹ However, there are also indications that some organizations are struggling to move forward on sustainability.²

What does it take to run a product sustainability program that generates business, environmental, and social benefits? Sustainability consulting firm, Pure Strategies, conducted 100 telephone surveys with individuals across the globe responsible for product sustainability at consumer product organizations. Participants had initiatives that ranged from nascent efforts to well-developed programs. We also performed in-depth interviews with leading companies to explore successes and challenges in product sustainability programs.

figure 1



Product sustainability path to achieving benefits — the three Ps of product sustainability: preparing, progressing, and performing.

“Performing” companies are achieving widespread business benefits, both financial and organizational, from their product sustainability programs.

The most exciting finding from our survey was that the companies that have already realized widespread financial and organizational value from their sustainability efforts (we’re calling them the “performing” companies) embrace specific practices that are key to their success. By learning from these leaders, our study points to a product sustainability path that can propel a company from preparing—to progressing—to performing at the highest level of product sustainability (Figure 1).

There are three critical elements common to performing product sustainability programs, as revealed in our research (see Figure 2):

Goals

Fully 97% of performing companies had goals (compared to 70% of others). Well-informed goals provide an important foundation for ensuring that programs meet internal and external needs and provide the desired benefits. Revenue targets from product sustainability improvements can help make goals meaningful across the organization to build the necessary support to move forward.

Product Assessments

Sustainability product evaluations and assessments inform decisions about products for 90% of performing companies, compared to 61% of companies lower down the sustainability path. Supplier engagement, customer scorecards and requirements, custom-developed life cycle tools, and chemicals/materials of concern assessments led the tools and approaches that delivered the greatest value.

Integration Into Product Development

Performing companies not only have a strong sustainability focus embedded in product development now, they are 90% more likely to intensify this focus, compared to 67% for the rest of the companies. This is a driving differentiator in product sustainability program performance. While it takes substantial organizational commitment to integrate sustainability into the core business effectively, there is a clear payback.

figure 2



Results are from a series of questions on these topics, details provided at the end of the report.

Companies typically begin their sustainability journeys with an internal operational focus to reduce energy, greenhouse gas emissions, water, and waste. It is important to evolve the program from that strong foundation into the core of the business, the product, in order to reap the greatest benefits.

Seagate

Computer drive and digital storage manufacturer, Seagate, is at the forefront of product sustainability, as evidenced by its cutting-edge material assessment systems that facilitate improved product environmental sustainability. Believing that top organizational sponsorship fosters lasting change, Seagate's executive management provided resources for new efforts while maintaining a sharp focus on the company's product sustainability goals.

Drivers & Benefits Put Product Sustainability in Motion

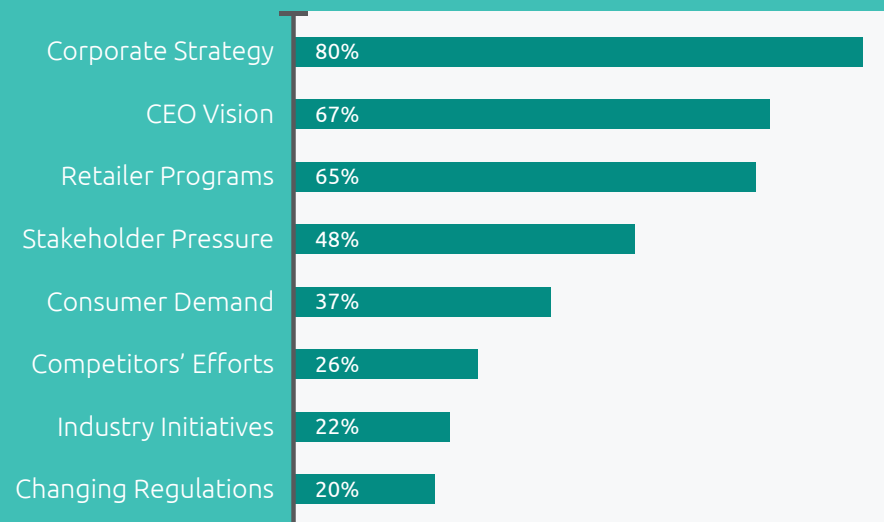
The clearest sustainability-related business benefits typically originate from cost-saving efforts to reduce a company's energy use, water use, and waste. It is not surprising, then, that corporate sustainability programs often begin with a focus on internal operations. However, *product* sustainability reaches beyond operations and manufacturing—and into design, product development, and supply chain functions. Both internal and external drivers encourage this broader approach.

We found that corporate strategy and CEO vision provide the primary internal push (see Figure 3). This aligns with past findings that most CEOs (over 70%) pursue sustainability to strengthen brand, trust, and reputation.³ Product sustainability's broader approach helps meet these CEO aims. Importantly, as a company's environmental and social impact lies mainly in upstream or downstream activities, a product focus can bring significant environmental and social improvement.

figure 3

How important are the following drivers in causing your firm to spend (budget or staffing) on product sustainability?

Percent of respondents rating the following important or very important:



There are notable differences in the way the performing organizations implement product sustainability programs — including how they plan, execute, and advance their programs.

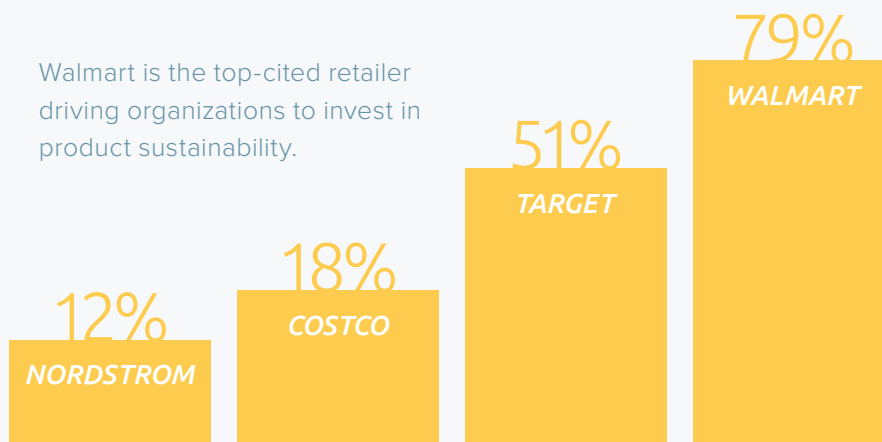
While companies face many external demands—from nonprofit organizations, shareholders, and consumers, our research found that retailers were the most significant external driver. Sixty-five percent of respondents rated retailers as important or very important in propelling corporate investment on product sustainability. As retailers are the interface between the upstream supply chain and the consumer, they are held accountable by consumers and stakeholders for product issues such as chemicals of concern, excessive packaging, and sourcing responsibly produced materials and products. As a result, retailers have expanded their engagement with brands and consumer product companies to include product sustainability issues.

The global influence of Walmart's Sustainability Index illustrates this. Walmart began evaluating its massive supplier base in 2012 with category-specific surveys about leading product issues. As a result, the conversations between suppliers and retailers have shifted to include issues ranging from ingredient sourcing and materials selection to consumer use and end-of-life management (see Figure 4).

figure 4

Name the top three retailers driving your organization to invest in product sustainability (open-ended)?

Percent of respondents that answered the question:



Timberland

Working with competitors can seem risky, but areas of common need or shared supply may offer excellent opportunities for partnering with rivals, as these are not typically competitive spaces. Timberland has been at the forefront of industry collaborative efforts and points to the Leather Working Group as a shining example of a successful partnership.

The leather supply is shared across brands and presents a notable source of greenhouse gas emissions, so supply chain collaborators, including tanners, brands, retailers, and other suppliers, developed a common means of measuring environmental performance. The standard incentivizes continuous improvement for energy reduction and other best practices to address the environmental burden from leather production.

Timberland saw a dramatic change in the industry once this common measurement methodology was developed. Brands now set goals to the standard and use it to verify practices. This provides a common foundation for the industry while giving brands the opportunity to differentiate with levels of performance. Timberland suppliers are aiming for the highest ratings of silver or gold. The company believes the Leather Working Group provided the needed focus to drive their business and the industry to critical progress.

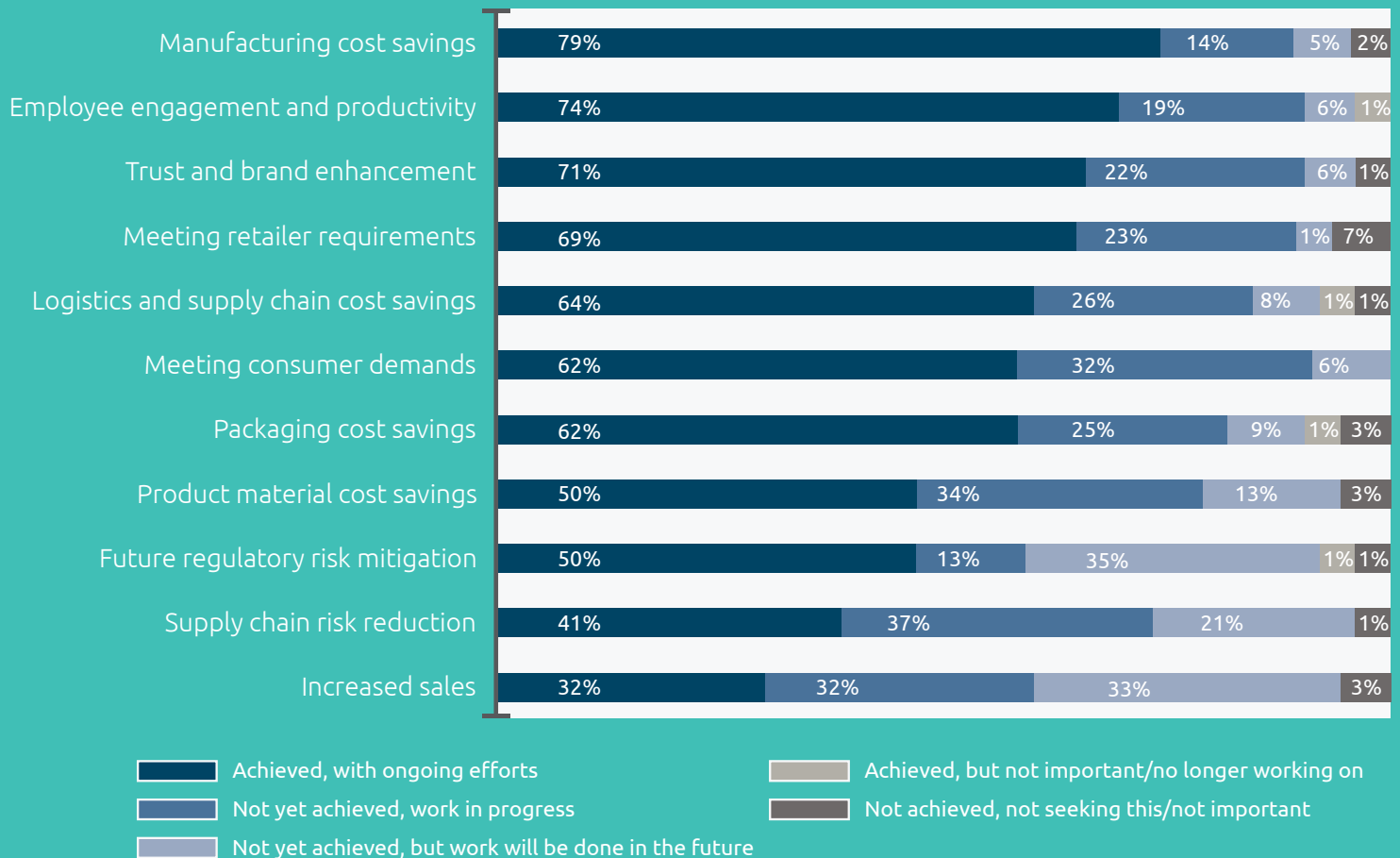
There are real business benefits to advancing product sustainability. Most of the companies we surveyed already realize direct financial and organizational value, with manufacturing cost savings, employee engagement, and trust and brand enhancement cited as the top benefits achieved (see Figure 5). These financial and organizational benefits, along with internal and external drivers, are pushing consumer product companies to expand their sustainability efforts. Greater than 90% of the companies we surveyed reported active work to achieve cost savings (across all life cycle stages) and improved effectiveness with employees, retailers, and consumers.

Benefits gained differed across the industries surveyed (see Figure 6). The consumer electronics industry was further along on sustainability, likely because of an early start from past nonprofit pressures, a long history of voluntary programs (e.g., US Energy Star), and strict regulations driving life cycle-based change (e.g., the EU Restriction of the Use of Certain Hazardous Substances in Electrical and Electronic Equipment (RoHS) Directive and the EU Waste Electrical and Electronic Equipment Directive (WEEE Directive)). The agricultural-based apparel and food industries were found to be lagging, partly because they haven't experienced the same level of pressure,

figure 5

Which business benefits have you achieved and are important to achieve from your company's product sustainability program?

Percent of respondents:



There are leaders in every industry; look around to get inspiration for your product sustainability program from outside your peer group.

programs, or regulations. While they have made slower progress determining how to proceed, there are signs that they are on their way toward performing (as illustrated in the Timberland case study described earlier).

In addition to differences in achievement between industries, we uncovered a segment of “performing” companies that are achieving business benefits from their product sustainability efforts. These companies derived a high number of both financial and organizational benefits from their product sustainability programs. Other companies were not as far along the path, with fewer benefits realized for progressing companies and preparing companies (see Figure 7). We discovered notable differences in the way the performing organizations were implementing product sustainability—including how they plan, execute, and advance their programs.

figure 6

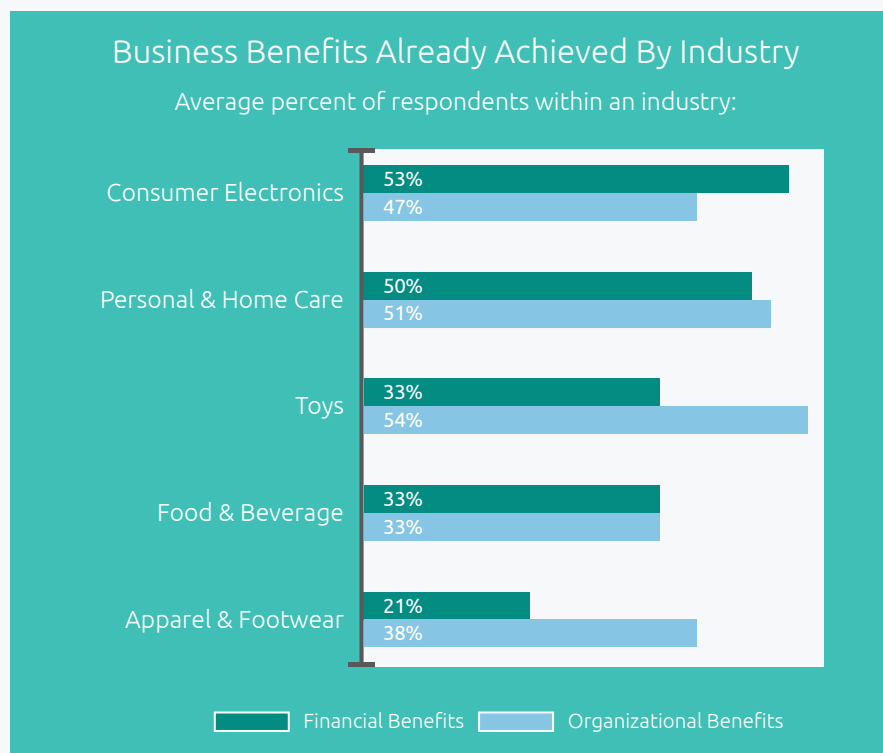
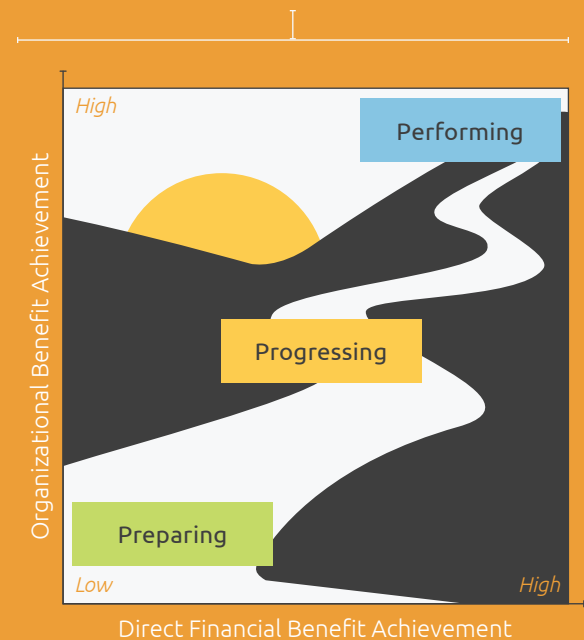


Figure 7



Survey respondents were grouped based on reported achievement on direct financial and organizational benefits:

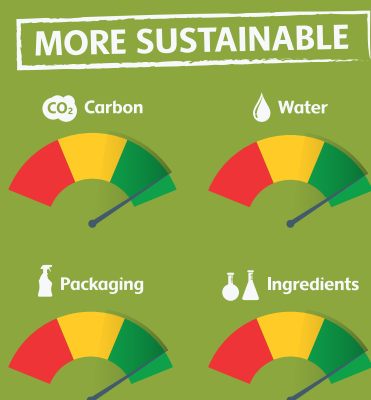
- **Performing:** achieving a high number of financial and organizational benefits (39 companies)
- **Progressing:** achieving fewer financial and organizational benefits (30 companies)
- **Preparing:** achieving a low number of financial and organizational benefits (31 companies)

RB

“Healthier lives and happier homes” is the corporate mission of global home, health, and personal care product manufacturer RB. When the company determined that over 90% of its carbon and water impacts were from raw materials and consumer use, RB set an ambitious goal of one-third of net revenue coming from more sustainable products by 2020.

RB then established a “better design” program that puts sustainability into the hands of its developers. This is done, in part, with the company’s Sustainable Innovation Calculator. The calculator is a streamlined assessment tool that allows product developers to evaluate their decisions based on the company’s priorities – carbon, water, ingredients, and packaging (see the dashboard from the calculator below).

The priority areas each have metrics in the calculator to address the few most relevant factors that drive design change, such as packaging efficiency per dose. The tool is particularly powerful as it gives information to the developers when they need it most – during the development process – so they can see the impact of their decisions and make product design choices for a more sustainable outcome.



Organizational Commitment & Business Integration Deliver Success

Corporate support for product sustainability programs is strong, pushed by both critical drivers and the likelihood of significant benefits. All 100 companies in the survey reported having an increase or no change in their budget in the next year — notably, no single company was expecting a decrease in funding. This is consistent with previous research findings on corporate sustainability programs.^{4,5}

Performing companies universally had corporate goals on product sustainability (97% of performing companies, compared to 70% of remainder). Goals provide the important leadership and organizational alignment necessary to support business integration and performance. These commitments do not need to be public, especially if there is strong leadership driving internal motivation and accountability. Interestingly, we observed a promising trend in the goals provided by the survey respondents — connecting product sustainability improvement goals to revenues. We heard from companies that putting goals and progress in terms that the business relates to, such as revenues, helps engage them faster. This is an important finding as business integration is a top challenge facing sustainability programs.⁶

Example goals from survey respondents:

“Increase revenue from more sustainable products...”

“...increase revenue from products that addresses sustainability concerns...”

“...increase by \$2 billion revenue from our products that reduce greenhouse gas emissions for our customers...”

“...get at least \$8 billion revenue based on non-toxic chemical products.”

Even more striking, we found that performing companies integrate sustainability into the product development process, and are 90% more likely to plan to improve this further over the next two years. This is far more than the 67% likelihood for other companies (see Figure 8). Integration early in the product development process and plans to advance it further were key indicators of performance in our study.

For example, we found that companies in the consumer electronics industry achieved the most widespread benefits of the industries surveyed. Already advanced in integrating sustainability into product development, our survey results showed that more consumer electronics companies are planning to pursue even deeper integration than those in other industries. This concerted effort to embed sustainability

Positioning product sustainability goals and progress in terms that the business relates to, such as revenues, helps engage them faster and provides critical alignment.

into product development in consumer electronics companies is consistent with other researchers' findings.^{7,8}

Currently, business efforts are concentrated in the pre-launch and commercial phase of product development, aligned with the historically dominant areas for sustainability programs, operations and manufacturing. However, performing companies are expecting to nearly triple product sustainability efforts at their bench-top/pilot product development in the next two years, with concept development set to double. Performing companies are planning to accomplish this without substantial budget increases, as business integration may have advanced to the extent that it is already included in budgets and sustainability activities can be part of day-to-day responsibilities without the need for additional resources.

The companies that systematically integrated sustainability into product development in our research pool employed three common best practices:

- Focusing development teams on a clear set of priorities.
- Providing sustainability information and tools to the development teams to guide their decision-making.
- Including sustainability in the “stage gate” management reviews on progress for each project throughout the development process, from concept to commercialization.

The “preparing” and “progressing” companies in our survey understand that they have some catching up to do. Those companies not yet achieving as many benefits report the largest anticipated budget increases in this area. The practices of high-performing companies reinforce the value of establishing product sustainability goals and integrating efforts into the product development process, along with employing the key assessment approaches outlined next.

Coca-Cola

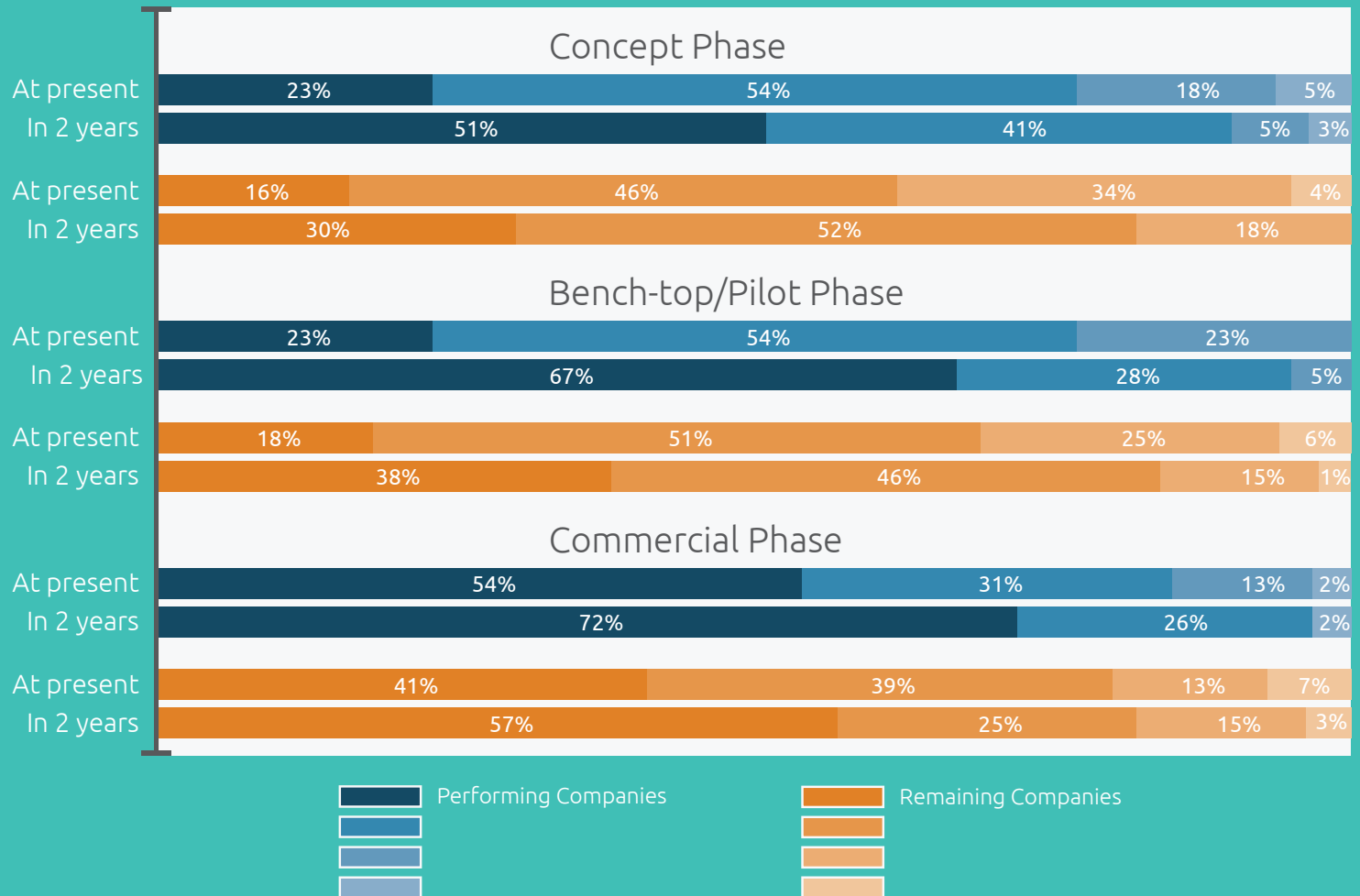
The Coca-Cola Company includes sustainability as one of R&D's strategic focus areas. As a result, sustainability is “front and center” during product development. This means that at each stage gate, management reviews product environmental and social attributes, integrating sustainability from concept to commercialization.

Performing companies are expecting to nearly triple product sustainability efforts at their bench-top/pilot product development in the next two years, with concept development set to double.

figure 8

In the product development process, where do you/
will you concentrate product sustainability efforts?

Percent of respondents rating from high (dark) to low (light):



The Toolkit of Performing Companies

Companies in our survey used a variety of assessment tactics to help plan, execute, and advance their programs. Ninety percent of performing companies are using sustainability tools to inform their product decisions (versus 61% of others), demonstrating the power of informed decision making. Life cycle assessment (LCA) is not the only option here, or even the primary one. While leading companies use LCAs to identify hotspots and priorities, respondents reported that supplier engagement and retailer scorecards provide the most value. Other approaches such as chemicals and materials evaluations and custom (typically streamlined) tools also show promise.

Supplier Engagement Ranks High

Supplier engagement ranked as the most valuable product sustainability assessment approach (see Figure 9). For many products, the biggest sustainability opportunities lie upstream, demanding action with suppliers. Typical efforts involve companies assessing and partnering with suppliers to drive sustainability. This engagement may lead to sourcing raw materials that are produced more sustainably or working with suppliers to reduce environmental or social issues. As supplier engagement is reaching upstream, transparency, communication, and collaboration are common challenges. As a result, this activity can require a targeted investment.

More performing companies rated supplier engagement as valuable or very valuable compared with the rest of the respondents (77% versus 69%). In addition, industries with more companies rating the resource demand high (apparel and footwear, consumer electronics, and toys) also had more companies that found supplier engagement to be valuable or very valuable. Our findings suggest that these activities deliver business benefits in line with their investment requirements.

Leading companies view their suppliers as true partners and take steps to nurture these relationships, with a long-term view. Performing firms invest in training and capacity building and interact with their suppliers often. When suppliers understand that they are valued, they are more willing to contribute to sustainability programs.

Retailer Scorecards Are Common Tools

Retailer or customer-required product sustainability scorecards, criteria, or standards were cited as the second most valuable tool leveraged by performing companies. Given that retailers were a top driver, this is not a surprise. Less obvious is that retailers have a growing interest in addressing product life cycle impacts and are

General Mills

General Mills, the company behind the iconic cereal Cheerios and other food products, examined its product sustainability impacts and found that they were concentrated in agricultural production. The company decided to focus much of its effort upstream to address these impacts.

General Mills goes to the farm, literally. The company collaborates with its suppliers to get to the source of where ingredients are grown in order to understand key challenges and determine the best ways to address them. Approaches include certification, verification, continuous improvement, and direct farm investment.

Regardless of the mechanism, engaging suppliers to improve the sustainability of an ingredient typically starts with pilot projects that are implemented first across a region and then expanded more broadly. General Mills' pilot to improve the sustainability of Idaho wheat using the Field to Market framework, for example, is being rolled out to other regions. This type of collaborative effort with supply chain partners involves agricultural input companies, in addition to direct suppliers and farmers, to collect data and help advance improvement practices.

General Mills is implementing this model across ten prioritized crops to meet its goal of sourcing them 100% sustainably by 2020. Representing about half of the company's raw material purchases, the crops include oats, wheat, corn, dairy, fiber packaging, cocoa, vanilla, palm oil, sugar cane, and sugar beets.

Henkel

Global home, laundry, and personal care product manufacturer Henkel, known for brands such as Dial and Purex, has integrated sustainability into its product development process with a custom-designed toolkit. There are two main elements: a hotspot map that is used at the project definition/concept phase; and a streamlined sustainability assessment tool used to review the product throughout the development process. These tools are used to ensure that each project delivers on at least one benefit, without compromising other priorities.

Both approaches evaluate the product's footprint and value. The footprint addresses materials and waste, energy and climate, and water and wastewater, while the value element of the program includes performance, health and safety, and social progress. The hotspot map used at the concept phase highlights relevant focal areas for the footprint and value of each product at the outset. The assessment tool evaluates options and is applied during development in a semi-quantitative way to consider the impacts of design changes. Prior to commercialization, the tool facilitates a quantitative evaluation to score the product and ensure it is delivering the greatest value with the lowest footprint.

Henkel Sustainability Matrix Illustrative Example

	Raw materials	Production	Logistics	Marketing	Use	Disposal
Value	Performance		PL per Pallet	Efficiency in Warehouse	Performance	Water growth
	Health and Safety			Easy Handling		
	Social Progress				Easy Handling	Less Plastics
Footprint	Materials and Waste	Free of Phosphates	Packaging Reduction		Storage	Recyclability
	Energy and Climate	GWP Raw Materials		CO ₂ Emissions	Washing Temp.	
	Water and Wastewater				Water used in machine	Pre-treatment

asking suppliers for supply chain information. As with supplier engagement, this effort comes with challenges, including access to data and a lack of transparency in the supply chain.

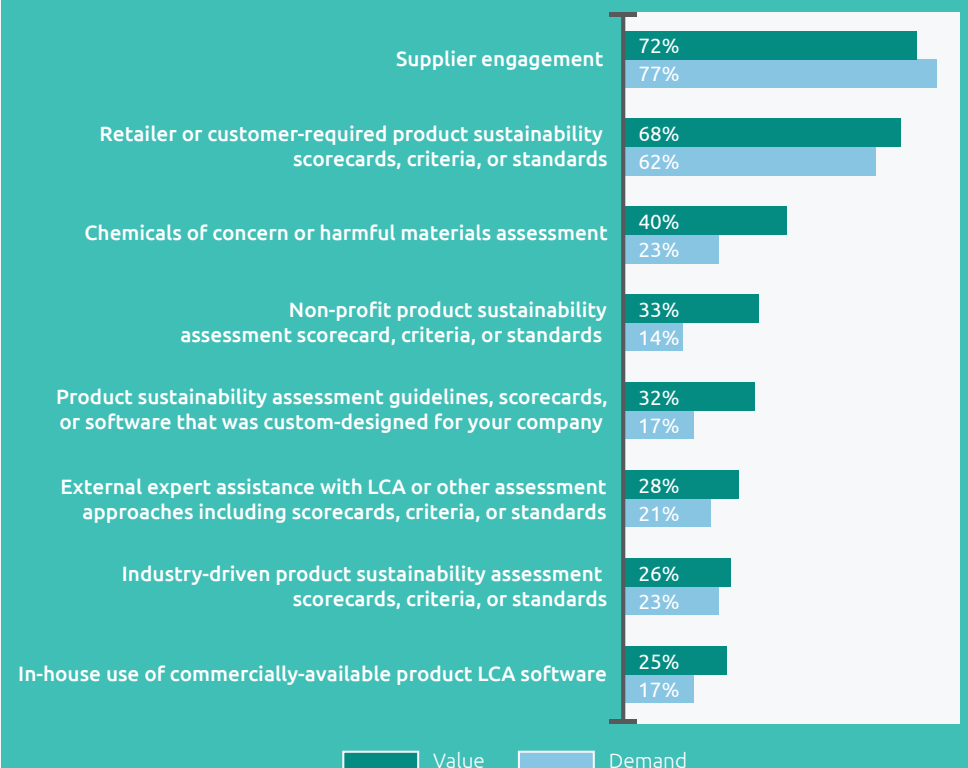
Investment in answering retailer scorecards can provide several benefits such as:

- Helping focus efforts on key improvement opportunities
- Providing guidance or resources to assist efforts
- Galvanizing internal alignment with a clear business driver

figure 9

How valuable (green) or demanding (blue) are the following approaches to product sustainability assessment?

Percent of respondents rating the following important or very important:



Supplier engagement is the leading product sustainability assessment approach as companies aim to tackle the largest impacts from their products, often upstream in the supply chain.

Other Approaches Show Promise

Assessing products, packaging, or processes for chemicals of concern involves an evaluation of the material's inherent health and environmental hazards (e.g., cancer, endocrine disruption, biodegradability) across the life cycle. This is a level of effort beyond that geared to meeting regulatory requirements or assessing products for market safety, as performed by most companies. Chemical of concern assessments support the elimination of hazardous chemicals and materials and their substitution with safer options. Respondents ranked this tactic third in value, noting a lower resource demand than the other leading options (see Figure 9).

Among the industries in our study, companies in the toy and personal and home care industries placed the greatest value on this approach. However, retailer programs and emerging regulations, such as California's Safer Consumer Products Act, may push more industries to place greater value on this in the future. Performing companies across all industries ranked this higher than the other respondents (46% versus 36%), indicating that this is a strategy that delivers real business benefits.

Custom-designed product sustainability tools such as scorecards or guidelines that focus product development efforts also help provide value to company programs. These tools often leverage LCA-based insight, as is the case for the RB calculator discussed earlier, that is streamlined to provide focused and rapid assessment. What is notable about these tools is that more of the performing companies rate them as valuable or very valuable than do the other respondents (44% versus 25%), demonstrating the potential in such tools.

Aveda

Aveda is recognized for their botanical-based cosmetic products. The company strives to use ingredients that are either naturally derived; certified organic; or sourced from sustainable or renewable origins without negatively affecting the ecosystem. In addition, the mission-based ingredient approach includes a restricted substances list and a thorough assessment of the human health and ecotoxicity of each ingredient. The formulators view a rating summarizing this information as they create products and aim to select the most preferable option, while avoiding chemicals of concern.

Conclusion: The Path to Performing

Internal drivers, retailer demands, and proven business benefits are contributing to the strong business focus on product sustainability. Companies that aren't already on the path toward high performance and achieving benefits from product sustainability will be at a competitive disadvantage in the future.

Our research identified the suite of best practices employed by companies already achieving financial and organizational benefits in product sustainability. It is evident that beginning with clear goals gets the program headed in the right direction. Supporting this by integrating sustainability into business processes such as product development is key to success. Sustainability isn't a separate effort; it works best when brought into the core business. Using the most valuable tools and approaches including supplier engagement, customer scorecards, and custom assessment reinforces the goals and provides the needed business integration.

Performing companies are blazing the trail to real business benefits and meaningful product advancements. This value is not unique to our sample; the Carbon Disclosure Project found that product design efforts yield the greatest financial and greenhouse gas savings.⁹ The insight of leading companies revealed in this research can guide those ready to advance on the path to realizing widespread business benefits from their own product sustainability efforts.



Those seeking to be a performing company should address the following questions:

Strategy

- Have we identified the hotspots from our products and possible ways to address them to establish priorities and focus for product sustainability efforts?
- Does our company have clear goals supported by leadership that articulate desired product sustainability outcomes?
- Are the goals and progress linked to the core business or revenues?

Assessment

- Do we engage suppliers to assess and improve performance on key focus areas?
- Are we effectively using our retailer scorecards or requirements to drive improvement in our products and supply chain?
- Are we addressing chemicals of concern and harmful materials to continuously improve the safety of our products, packaging, and manufacturing processes?

Business Integration

- Have we integrated the sustainability focus areas into our management reviews or “stage gates” during product development?
- Have we provided the development teams with relevant information and tools, such as sustainability guidelines, to guide their decision-making?
- Do we have a visual progress tracker to quickly inform and hold teams accountable?

Endnotes

Figure 2 Details

Product Sustainability Goals: Do you have corporate goals on product sustainability? Percent of respondents that answered: Yes.

Sustainability Product Assessments Informing Product Decisions: Which statement best describes your organization's current perspective on product sustainability? Percent of respondents that answered: We are using product sustainability tools to evaluate our existing products AND integrating into new product decisions (and not either: We are using product sustainability tools to evaluate existing products but NOT integrating into new product decisions; We are exploring what product sustainability means for our business).

Advancing Sustainability Integration in Product Development: In the product development process, where do you concentrate product sustainability efforts? AND In two years' time, in the product development process, where will you concentrate product sustainability efforts? The percent increase in the respondents likely to have a high concentration (on a scale of 4 out of 4) over two years' time.

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