

The KANTAR logo is positioned in the top left corner. The letter 'K' is yellow, while the letters 'ANTAR' are white. The background of the entire slide is a dark blue, textured surface that resembles a close-up of a bird's feathers or a similar organic pattern. A large, bright blue diagonal shape, resembling a stylized arrow or a large 'V', points from the top left towards the bottom right, framing the main title.

KANTAR

Sustainability Consumer-led Brand Ranking

The brands turning sustainability
into trust and brand strength

June 2026

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WELCOME

Everyone asked for examples of brands getting sustainability right. So we built this.

Earlier this year, we published the first chapter of Sustainability in Action. It laid out where consumers stand in 2026: still deeply concerned about environmental and social issues, but overwhelmed, uncertain and stretched amid multiple crises. In this context, expectations remain high but trust and attention are fragile. Separating momentum from importance is key because people still want brands to help them act - but not by being asked to care more. They want less noise and more proof, fewer promises and more progress.

Over the last year, brand teams, sustainability leads, insights leads and marketers came back to us with the same request: show us who is doing this well. That question is what led to this report.

We purpose-built a consumer-led sustainability ranking to answer it. Across 12 countries and 12 categories, we measured more than 2,000 brands, fielded with over 18,000 people. It is not an ESG audit. It is not a corporate reputation score. The ranking leverages our award-winning BrandSustainability metrics to measure two things: do consumers find a brand credible on sustainability, and are perceptions strengthening the brand? Every data point in this ranking connects to how brands create value: specifically, to the Meaningful, Different and Salient framework that underpins Kantar's understanding of brand equity and growth.

The results reveal something important about how sustainability plays out differently across markets. Of the 180 brands measured in each country, the proportion that achieve both credibility and positive brand impact varies enormously. In South Africa and Japan, over 80 brands meet that threshold. In France, Brazil and the UK, that drops to under 50, and in the Czech Republic, just 34. What consumers expect, what they reward, and how hard they are to convince varies by market, by category, and by culture.

But the ranking alone is not the insight. From across these markets, we selected the 62 brands that consistently stood out: the Global Top 20 and the Top 5 in each country. These are the brands we knew would be the richest to learn from. We studied

them closely. We looked at what they sell, how they communicate, where they invest, how they behave at the point of purchase, and how they show up across different markets. We also invited several of them to share their perspective directly to learn from their practical experience: what choices they made, what worked, what they would do differently.

What emerged was not a single formula. It was a set of 12 recurring patterns, organised into four areas: how leading brands build their foundation, how they prove their claims, how they design the consumer experience, and how they make sustainability resonate culturally. Strategic intelligence on how the strongest brands convert sustainability into trust, equity and growth. Some of these patterns confirmed what we expected. Others surprised us. A 190-year-old German sausage maker and a Brazilian online marketplace have more in common than you might think. What consumers reward is not always what the industry applauds.

In Chapter 1 we asked what consumers expect. Here, we looked at who is delivering, and what the rest of us can learn from them.

Last year Kantar worked with more than 1,200 brands on sustainability across sectors and geographies, and the single biggest barrier I see is not a lack of ambition. It is a lack of confidence. Teams know they should be doing more but worry about getting it wrong, about being accused of greenwashing, about investing in something they cannot prove is working. The brands in this ranking offer something valuable: evidence that it can be done, and a practical map of how. Anchored in evidence. Built for the decisions you need to make next.



Karine Trinquetel
Global Solution Lead,
Sustainable Transformation
Practice
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Executive summary

Sustainability perceptions have been shown to contribute up to 10% of the value of some brands in the Kantar BrandZ Global Top 100 (2025). Ads with sustainability components score 23 percentile points higher on distinctiveness and 18 points higher on emotional engagement than those without. There is no creative penalty for leaning into sustainability. There is a consumer-facing commercial case for it.

That does not make sustainability the whole story. Brand equity relies on overall market exposure and consumer experience and is built from many things that makes up a brand's meaningful difference. Sustainability is one ingredient in that recipe. But it is an ingredient that is growing in weight: its contribution to brand equity has grown 25% over the last 5 years. Yet it is still something many brands aren't getting right.

57% of people globally say they have encountered false or misleading information about brands' sustainability efforts. Only 15% say they know a lot about what brands are actually doing. And when a brand stays silent, consumers tend to assume the worst. The gap between what people expect and what they perceive is wide, and getting wider.

So which brands have found a way through?

We built the BrandSustainability ranking to find out. It measures two things: do consumers find a brand credible on sustainability, and are perceptions strengthening the brand? The proportion achieving both varies enormously by market, from over 80 brands in South Africa and Japan to under 50 in France, Brazil and the UK.

From across these markets, we selected the 62 brands that consistently stood out and decoded what they have in common. The result: 12 principles, organised into four areas.

Act 1: Foundation

What must be true before anything else begins.

- **01. Not an agenda. An amplifier.** Sustainability works when it lives inside the brand, not beside it. Ecover does not add sustainability to cleaning. Cleaning that protects the planet is the product.
- **02. Performance is the entry ticket.** The sustainable version must work as well or better. The North Face built its reputation on gear that performs in the most extreme

conditions on earth, and its sustainability commitments have to meet that same bar.

- **03. You can't buy it in a quarter.** Trust compounds through consistent commitment. LEGO bricks from 1958 still connect with bricks made today, 68 years of the same system and the same values.

Act 2: Proof

How the position becomes credible.

- **04. Show it. Don't say it.** The most credible communication is often the product itself, or the building. Nationwide has 605 branches across the UK, all pledged to stay open until at least 2030, at a time when every major bank is leaving the high street.
- **05. Don't just meet the expectation.** Move it. BYD did not just make an EV. It redefined what safe and affordable look like, and changed what every competitor now has to deliver.
- **06. Honesty outperforms perfection.** The Ordinary built an entire brand on exposing what the beauty industry hides. Frosta removed every additive from its products, lost 40% of sales, nearly went bankrupt, and kept going. Today it leads the German frozen meal market.

Act 3: Experience

How sustainability lands with people.

- **07. No penalty for the right choice.** Aldi Australia is the country's most affordable supermarket and its Green Supermarket of the Year. If a discounter can make sustainability the default, any brand can.
- **08. The participant is the proof.** Adidas produced 15 million pairs of Parley Ocean Plastic shoes in a single year, each one reusing approximately 11 plastic bottles. Then Move for the Planet got over a million people to convert their workouts into climate action funding. The consumer does not just witness the impact. They are part of it.
- **09. Inclusion is who you serve, not just who you cast.** Mastercard redesigned its card twice for two communities that were being excluded by the existing design. True Name lets transgender and nonbinary people use their chosen name. Touch Card uses distinct notches so blind and partially sighted people can tell their cards apart by touch.

Act 4: Resonance

How sustainability scales across voices and cultures.

- **10. Let creativity carry the conviction.** Back Market does not explain why refurbished is better. It found that wordy messages about saved carbon did not land. What worked was the visual: making the sustainable choice look desirable, not dutiful. The creative does the convincing when the copy cannot.
- **11. Creators help the message travel.** Dove has spent 21 years building the case that real beauty matters, and their own campaigns have done extraordinary work in shifting culture. What creators add is a different register. When creator Taryn Delanie held up an AI version of herself and said “It’s beautiful, but it’s not me,” she gave that message a personal texture and resonance.
- **12. Sustainability speaks with an accent.** In France, the top 5 are all cooperative, organic or citizen-led. In Japan, a games company, an airline and an oil company lead. In Poland, energy independence is a sustainability play. The same ranking framework produces very different answers depending on where you are.

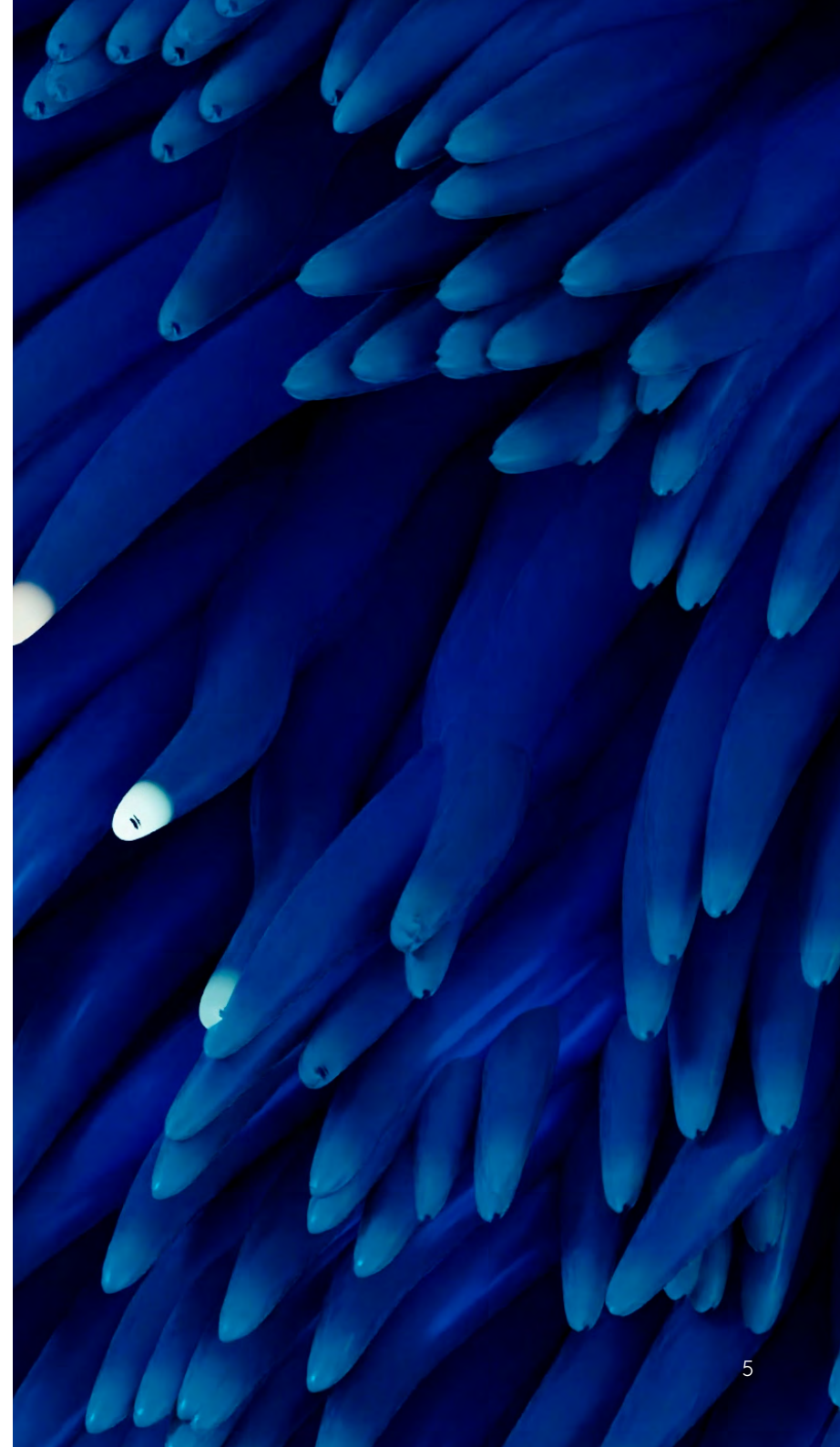
A closing consideration: AI readiness

58% of people say it is hard to tell what is good or bad ethically or for the environment. Increasingly, they are asking AI for help and this has the potential to reinforce or erode your brand equity. As AI increasingly mediates how people discover and evaluate brands, being visible and accurately represented in AI systems matters as much as being present on shelf or in memory. Every principle in this study is simultaneously an AI readiness principle. The brands in this ranking are well positioned, not because they optimised for AI, but because they built something consistent, specific, and verifiable. That is what AI rewards.

What to do with this report

Benchmark where your brand stands against the 12 principles. **Identify** the two or three areas where your biggest gaps and opportunities lie. **Use the examples** to build the internal case for action. And **localise**: before entering any market, map the local anxiety hierarchy, not the global one.

In the sections ahead, each principle is explored in depth with the brands that embody it, complemented by brand voices from leaders who shared their practical experience. A self-assessment diagnostic at the end helps you turn the principles into a working tool for your own brand.






Brands who shared their experience

This report is built on consumer data and our analysis of it, but it is enriched by the people behind the brands. We are grateful to the leaders who shared how they navigate environmental, social and sustainability concerns in practice: the choices they make, the trade-offs they manage, and the perspective they have built along the way. As some of the highest-scoring brands in the ranking, their experience adds richness and practical depth to what the data reveals. Their voices appear throughout the report.

INTERVIEWS

BRAND	MARKET	CATEGORY
 mastercard	Global	Banking, payments and insurance
 Back Market	Global	Retailer
 nationwide	United Kingdom	Banking, payments and insurance
M&S	United Kingdom	Retailer
 takealot.com	South Africa	Retailer
 magalu	Brazil	Retailer
 Neoenergia	Brazil	Energy providers
 TERRES D'ADVENTURE	France	Travel and holiday services
 FROSTA	Germany	Packaged food

QUOTES AND CONTRIBUTIONS

BRAND	MARKET	CATEGORY
	Czech Republic	Banking, payments and insurance
	Czech Republic	Personal care and beauty
	Czech Republic	Retailer
	Poland	Retailer

PART 1

The case for action

Sustainability is already contributing to brand value

Before we get into the ranking, it is worth establishing why this matters commercially. The moral case doesn't need making but brand teams need evidence to justify investment.

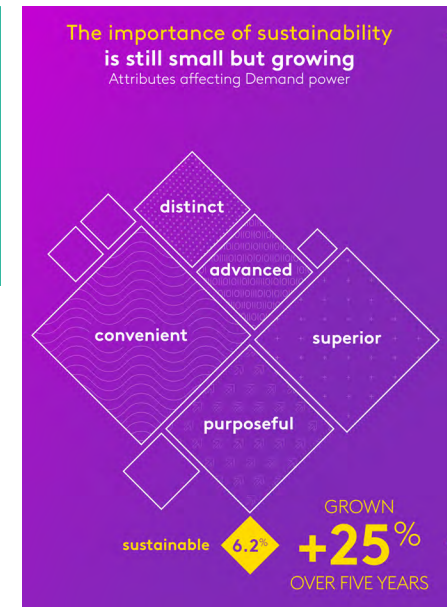
Sustainability perceptions have been shown to contribute up to 10% of the value of some brands in the Kantar BrandZ Global Top 100 (2025). The importance of sustainability as a driver of brands' Demand Power has grown by 25% over the last five years.

That does not make sustainability the whole story. Brand equity relies on overall market exposure and consumer experience and is built from many things that makes up a brand's meaningful difference like functional performance, emotional connection, pricing, distribution, great innovation that unlocks new spaces. Sustainability is one ingredient in that recipe. But it is an ingredient that is growing in weight, and one where there is significant headroom for most brands to improve.

The creative evidence reinforces this. Analysis of 12,282 ads from the Kantar LINK database, classified against the Ad Net Zero sustainable behaviours framework, shows that ads featuring sustainable behaviours alongside an environmental message score 23 percentile points higher on distinctiveness and 18 points higher on emotional engagement than ads without sustainability components. They also perform well on long-term brand equity contribution (+16 percentile points). There is no creative penalty for leaning into sustainability. If anything, it gives creative teams a platform that naturally drives the distinctiveness and emotional response that all advertising aims for.

It is worth noting that the effect is not only about saying the right things. Ads that show sustainable behaviours (not just messaging) drive distinctiveness more effectively than those relying on an environmental message alone. As Polly Wyn Jones, Kantar's Global Knowledge Director for Creative & Media, put it: "Advertisers don't need to choose between being responsible and effective. It is possible to combine the two. Brands using decision intelligence to support clearer, braver and more explicit sustainable messaging in their ads can reap the rewards of both."

The implication is clear: sustainability works harder for brands when it is embedded in what people see the brand doing, not just what the brand says about itself. This is a thread that runs through the entire ranking and the 12 principles that follow.



Ads that feature:	Sustainable behaviours AND environmental message	Environmental message only
Long term – brand equity	+16	+17
Short term – sales likelihood	+3	+13
Ad distinctiveness	+23	+12
Emotional engagement	+18	+6

Percentile difference vs ads without sustainability components. Source: Kantar LINK Database, 12,282 ads classified against Ad Net Zero sustainable behaviours framework.

But most brands are not landing it

If the commercial case is this strong, why are so few brands benefiting from it? The short answer: consumers are not hearing from most brands, and when they do, they often do not believe what they hear.

Silence is penalised

If a brand does not mention what it is doing to address societal issues...



say will assume the brand is doing nothing or hiding something (net).

Awareness is low

On average, globally, across sectors,



say they know a lot about brand sustainability efforts.

Scepticism is high

On average, globally, across sectors,



of people say they have seen, or heard, false or misleading information about sustainable actions taken by brands.

When a brand stays silent on sustainability, it is not a neutral position. The 2025 Edelman Trust Barometer found that 53% of people say that if a brand does not mention what it is doing to address societal issues, they will assume it is doing nothing or hiding something. Silence is interpreted.

And right now, most brands are effectively silent. Our BrandSustainability database shows that, on average, globally, across sectors, only 15% of people say they know a lot about what brands are actually doing on sustainability. The vast majority of brands are not visible on this topic. Awareness is the foundation of equity, and on sustainability, most brands have barely laid it.

As a result, scepticism fills the gap. Kantar's 2026 Sustainability Sector Index reveals that 57% of people globally say they have encountered false or misleading information about brands' sustainability efforts. The gap between what people expect and what they perceive is wide, and getting wider.

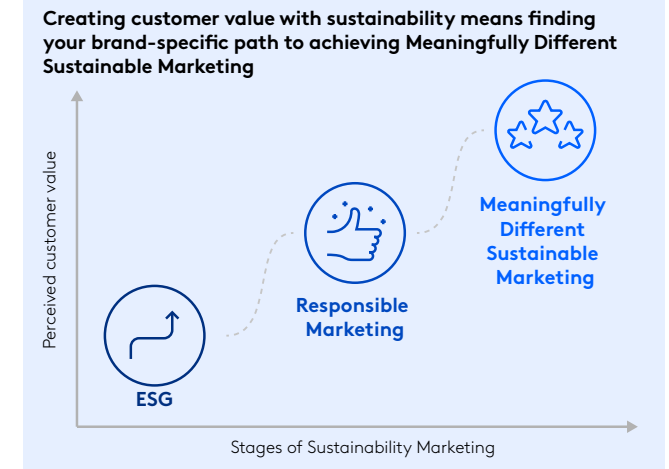
Substance first. Then choose what to show.

The temptation, faced with these numbers, is to communicate more: more campaigns, more claims, more sustainability content. But communication without substance is exactly how brands end up in the 57%. The pre-requisite is doing the real work. Making the product or service - as well as operations and the supply chain - genuinely better. That is the behind-the-scenes ESG work that earns the right to say anything at all.

But doing the work is necessary and not sufficient to create perceived customer value. Many brands are investing seriously in sustainability and getting no credit for it with consumers. The 15% awareness figure tells that story. The problem is not that they are doing nothing. It is that what they are doing is not reaching people, or not reaching them in a way that lands.

Amongst those who do include sustainability in their customer-facing propositions, most of what we see today is responsible marketing; one that addresses peoples' concerns, reassures and reduces harm. We've learned from our latest R&D that it's important for customer retention, but it's not enough to drive growth. The real commercial opportunity lies in progressiveness delivered though meaningfully different sustainable marketing.

The brands at the top of our ranking are not necessarily the ones doing the most. They are the ones being sharpest about what they choose to surface and how they make it stick. They do not try to communicate everything they do. They pick the proof points that are most tangible, most visible, and most connected to what consumers in their category actually care about. Then they find ways to make those proof points part of the brand experience rather than just part of the brand messaging.



That selectivity is part of what separates a brand that earns consumer trust on sustainability from one that is doing good work in silence or, worse, communicating everything and being believed on nothing.

The ranking and the 12 principles that follow are grounded in what 18,000 consumers across 12 markets told us about 2,160 brands, decoded through the lens of which brands are converting sustainability into genuine brand strength, and how they are doing it.

PART 2

What is the ranking?

This ranking is a consumer-led measure of how 2,160 brands across 12 countries and 12 categories perform on sustainability, as perceived by over 18,000 people. It does not assess corporate sustainability policies or ESG performance. It measures two things: whether consumers find a brand credible on sustainability, and whether those perceptions are actually strengthening the brand. Sustainability is defined by consumers themselves, based on what matters most to them in each category and each market. Country rankings are built independently, and the global ranking aggregates them with equal weight given to each country so that no single market dominates the picture.

Sustainability means different things depending on what you are buying

Sustainability is a broad concept and is not one single thing to consumers. It means different things to different people, and what consumers care about shifts significantly depending on what they are buying. A personal care buyer is thinking about animal testing and harmful chemicals. Someone choosing a bank is thinking about data privacy and financial inclusion. A parent booking a holiday is thinking

about overtourism and low-paying jobs. These are all sustainability concerns, but they have almost nothing in common.

This variation is the lens through which sustainability affects consumer choice. To understand how sustainability affects brand equity from a consumer perspective, brands must be evaluated in the context of what people personally care about. So, before rating any brand, we asked consumers in each category which sustainability issues matter most to them personally, so that sustainability is defined from the ground up by the people whose perceptions we are measuring.

These priorities also shift by country. A personal care buyer in India and one in France may share the same category but worry about quite different things. This is why the ranking can produce genuinely local answers rather than imposing a single global definition of what “good” looks like. This is why this approach travels across categories and countries without losing consumer relevance.

Below we show the top 3 sustainability concerns identified by consumers in each of the 12 categories at a global level.

CATEGORY	#1 CONSUMER CONCERN	#2 CONSUMER CONCERN	#3 CONSUMER CONCERN
Personal care & beauty	Animal testing, cruelty and abuse	Use of harmful chemicals (toxicity, allergens)	Plastic and microplastics pollution
Clothes, shoes & fashion	Child labour, sweatshops and worker exploitation	Use of harmful dyes and chemicals	Overproduction and overconsumption
Packaged food & beverages	Too much sugar, salt, or trans fats	Plastic and microplastics pollution	Overpackaging, single-use, non-recyclable packaging
Laundry & cleaning	Use of harmful or toxic chemicals	Water pollution or water scarcity	Plastic and microplastics pollution
Retailers & supermarkets	Overpackaging, single-use, non-recyclable packaging	Plastic and microplastics pollution	Waste and amount of things going to landfill
Fast food, coffee & dining	Too much sugar, salt, or trans fats	Overpackaging, single-use, non-recyclable packaging	Plastic and microplastics pollution
Travel & holiday services	Climate change	Air pollution	Excessive visitors strain local ecosystems and infrastructure
Banking, payments & insurance	Lack of cybersecurity and data privacy protection	Not enough financial learning and knowledge	Increasing economic inequality
Cars	Air pollution	High carbon footprint and greenhouse gas emissions	Lack of recycling car parts and batteries
Energy providers	Power outages and grid instability	Climate change	Air pollution
Entertainment & leisure	Misinformation and unethical content creation	Lack of cybersecurity and data privacy protection	Mental health issues through exposure to harmful content
Electronics, technology & platforms	Lack of cybersecurity and data privacy protection	Misinformation and unethical content creation	Mental health issues through exposure to harmful content

What stands out when looking at this context is how different the sustainability agenda is from one category to the next. In food and fast food, nearly half of consumers point to sugar, salt and trans fats as their top concern. In banking, nobody mentions packaging. In electronics and entertainment, the top three issues are all about information, mental health and screen time, with environmental concerns nowhere in sight. A sustainability strategy that works across categories has to start with an understanding that consumers are not thinking about “sustainability” as a single concept. They are thinking about the specific harms and opportunities that are closest to the product or service in front of them.

Three measures, through consumers’ eyes

The ranking is built on Kantar’s award-winning BrandSustainability metrics.

Sustainability credibility captures whether consumers see a brand’s sustainability efforts as genuine and legitimate. It is built from measuring both concerns and praise, so it reflects scepticism as well as perceived efforts. A brand with strong initiatives but visible contradictions will show up here.

Sustainability influence measures how strongly sustainability contributes to brand meaning, relevance and preference, connecting to Kantar’s Meaningful, Different and Salient framework. A brand can be credible on sustainability without that credibility doing anything for the brand commercially. This metric tells you whether it is.

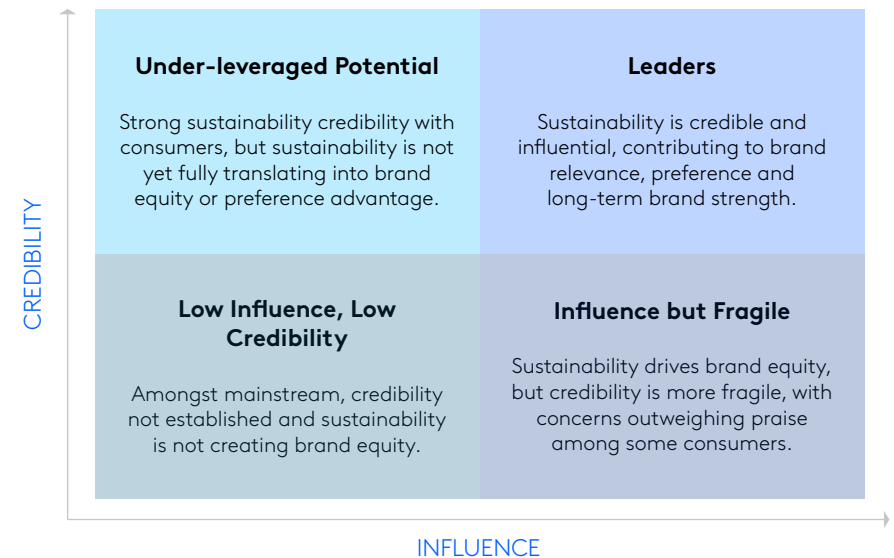
Influence adjusted to brand size provides a relative view, showing whether sustainability is contributing more or less than you would expect given a brand’s size and familiarity. This enables fair comparison: a small brand with deep sustainability credentials can outperform a global giant on this measure.

All metrics are calculated amongst people aware of the brand.

 Sustainability credibility Is this brand believed and trusted on sustainability?	 Sustainability influence Does sustainability actually strengthen the brand?	 Influence adjusted to brand size Does this brand punch above its weight on sustainability?
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Four positions on sustainability

These metrics do not have to move together. Sustainability can be credible but not yet contributing to brand strength, or it can be contributing to preference but on fragile foundations. The interplay between credibility and influence creates four distinct positions. This is how we classify every brand in the ranking, and when we refer to sustainability leaders throughout this report, we mean brands that sit in the top-right quadrant: those where sustainability is both believed and commercially productive.



Understanding which quadrant a brand occupies changes the strategic response entirely. A brand with under-leveraged potential needs to find ways to convert existing trust into brand preference. A brand in the fragile quadrant needs to address the concerns eroding its credibility before investing further in sustainability communications. And a brand in the bottom-right needs to build the foundations before it can expect sustainability to contribute to growth.

The top ranking brands are all in the “Leaders” quadrant: in these cases, sustainability contributes to brand equity in excess of what we would expect given a brand’s familiarity. They are the brands where both credibility and influence are strong, and they are the richest source of learning for any brand seeking to move into that position.

About BrandSustainability

The metrics behind this ranking come from BrandSustainability, Kantar's validated approach to measuring how sustainability perceptions contribute to brand equity. It won the 2025 Global ESOMAR Bronze Award as a Breakthrough Research Methodology, recognised as the first approach to connecting sustainability perceptions directly to brand equity and growth.

The ranking applies these metrics across 2,160 brands to create a consumer-led benchmark. For brands wanting to go deeper, a full BrandSustainability study answers the questions this ranking naturally raises at a brand-specific level: how your brand is truly perceived on sustainability, whether those perceptions are helping or holding back your equity, and where the most efficient routes to growth lie in your category and market.

To find out more, visit kantar.com/campaigns/brandsustainability



How we built the ranking

12 countries: United States, United Kingdom, France, Germany, Poland, Czech Republic, Australia, Japan, India, Brazil, Mexico and South Africa, chosen to represent a spread of economic contexts, cultural attitudes to sustainability and regional diversity.

12 consumer categories: Personal care and beauty. Clothes, shoes and fashion. Packaged food and beverages. Laundry and cleaning. Retailers and supermarkets. Fast food, coffee chains and casual dining. Travel and holiday services. Banking, payments and insurance. Cars. Energy providers. Entertainment and leisure. Electronics, technology and services platforms.

We deliberately chose categories that span the full consumer landscape, CPG and non-CPG, short purchase cycles and long ones, because sustainability shows up very differently depending on what you are buying.

180 brands per country (15 per category), combining global and local brands to balance scale and local relevance. A core set of global brands was included across all countries where present, even when not among the largest players locally, to enable the creation of a robust global ranking. The global versus local brand mix varies by category, reflecting market realities: energy brands, for example, are predominantly local, while technology brands are largely global.

The objective of this ranking is to inspire brand success, not to produce a census. A minimum level of consumer visibility of sustainability efforts was used as a key selection criterion. While significant category players were prioritised, some large brands perhaps less visible on sustainability were excluded in favour of smaller brands that are more active and visible in this space.

Brand selection is based on consumer perception relevance, not on corporate sustainability activity alone. Visibility across both environmental and social sustainability dimensions was considered.

The focus is on consumer-facing brands rather than corporate or holding brands, with a small number of category-specific exceptions, notably in food and beverages where high awareness of corporate brands exists.

To ensure cross-country consistency, similar coverage of relevant sub-categories was maintained across markets. Within categories, we also ensured the inclusion of brands that appeal to different audiences, so that a broad and representative set of consumers can meaningfully evaluate them.

18,000 people interviewed in January 2026 (1,500 per country), category buyers drawn from a nationally representative sample balanced on gender, age and region. Respondents have to be aware of a brand to evaluate it.

How the ranking works: country first, then global

Each country ranking stands on its own. It reflects how brands perform with local consumers, based on what people in that market see, experience and associate with those brands in their everyday lives. A brand's position in the UK ranking is determined entirely by UK consumers.

The global ranking is built from the country rankings, not alongside them. Only brands appearing in three or more countries are eligible. Metrics are converted into within-country, within-category percentiles to neutralise cultural response bias, and the global ranking is then ordered by average Influence adjusted to brand size percentile, equally weighted across countries. This means no single large market dominates the global picture: a brand that performs consistently well across several smaller markets can rank ahead of one that performs strongly in one large market alone.

In practice, the country rankings and the global ranking can tell different stories, and both are valid. A brand can be a clear leader in its home market without appearing in the Global Top 20, and a globally ranked brand may not feature in every country's Top 5.

PART 3

2026 Ranking

Congratulations to the brands in this year's ranking. Recognition as a sustainability leader is a major achievement, and we're proud to highlight those turning sustainability into trust and brand strength.

Kantar Sustainability Consumer-led Brand Ranking 2026

GLOBAL TOP 20

1



2

The Ordinary.

3



4



Mercedes-Benz

5



6



7



8

SONY

9

BYD

10



11



12



13

BIOSSANCE..

14



15



16



17



18



19



20



TOP 5 BY COUNTRY

AUSTRALIA	BRAZIL	CZECH REPUBLIC	FRANCE	GERMANY	INDIA
1 	1 	1  Mercedes-Benz	1 	1 	1 
2 	2 	2  NATURAL CARE	2 	2 	2 
3 	3 	3 	3 	3 	3 
4 	4 	4 	4 	4 	4 
5 	5 	5 	5 	5 	5 
MEXICO	POLAND	JAPAN	UK	USA	
1 	1 	1 	1 	1 	
2 	2 	2 	2 	2 	
3 	3 	3 	3 	3 	
4 	4 	4 	4 	4 	
5 	5 	5 	5 	5 	

Not just one type of brand at the top

A natural question when looking at a ranking like this is what the top brands have in common. Are they all sustainability-first challengers? Are they all global giants? Are they all operating in the same sectors or addressing the same issues? The answer is no.

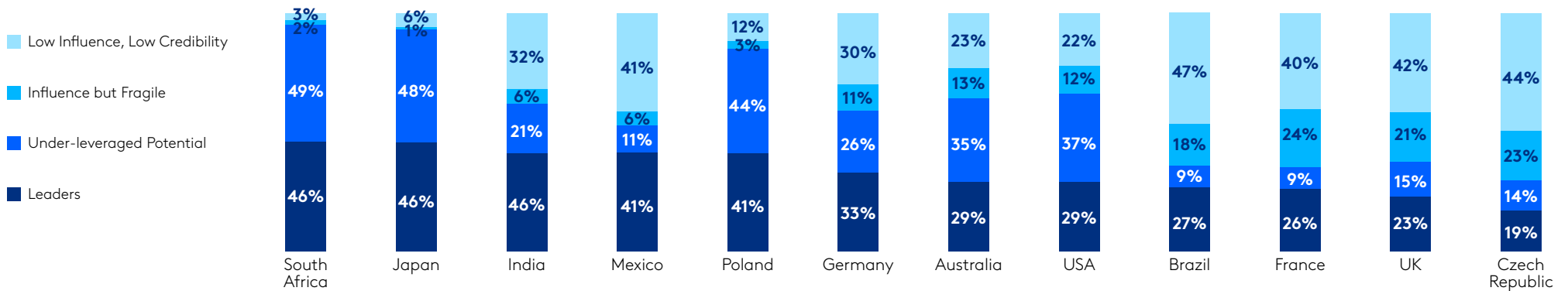
The brands at the top of this ranking do not fit a single mould. They come from different countries, different categories and very different starting points. Some were built around sustainability from the beginning, such as Ecover or Veja. Others are large, established global brands such as Mercedes-Benz, Sony or Mastercard. Some are more visible for their environmental progress such as Back Market, others for the way they respond to social expectations like Disney and Dove.

This diversity is important. It shows that there is no single model for making sustainability work for a brand. There is no requirement to be born sustainable, to operate at a specific scale, or to lead on one particular dimension. What matters is how sustainability is expressed in a way that is meaningful and credible to consumers.

It also means that the ranking should not be read as favouring a particular type of organisation. The common factor across these brands is not what they are, but how consumers perceive and experience what they do.

A different picture across markets

This ranking is built on a defined scope: 180 brands assessed in each country, across 12 categories. Within that frame, we can look at how brands distribute across the four sustainability positions in each market.



Rather than drawing definitive conclusions market by market, this view highlights how different the landscape can be depending on context.

In some markets, a larger share of brands already combine sustainability credibility with meaningful brand impact. In others, more brands sit in the “under-leveraged” or “low influence” positions, where sustainability is either not yet translating into equity, or not yet established as a credible part of the brand.

This is not an exhaustive picture of each market, but it provides a directional view within the scope of the brands covered in this study. It reinforces a point we will come back to throughout the report: the conditions for making sustainability work for a brand are not identical everywhere.

Why this matters before moving to the principles

The brands in this ranking do not follow a single model or origin story. They show that there are multiple ways to make sustainability work for a brand. What connects them is not what they are, but how clearly sustainability comes through in what consumers see, understand and experience.

So the question is not which type of brand will win on sustainability. It is how brands make it work.

PART 4

The 12 principles

How the top-ranking brands translate sustainability into trust and brand strength

The ranking tells us which brands are succeeding. The next question is how.

To answer that, we moved beyond the league table and looked closely at the 62 brands that stood out across the Global Top 20 and the country Top 5s. They are not all the same kind of brand. They come from different markets, different categories and different starting points. But when you look across them, patterns begin to emerge.

Those patterns form the 12 principles in this section. We have organised them into four acts. Not because brands follow them in a neat sequence, but because together they describe how sustainability moves from being something a brand does, to something consumers recognise, value and reward.

The intention is not to prescribe a single route or checklist to apply in sequence but to show the different ways brands make sustainability work in the real world. They give a practical way to move from intention to execution, grounded in how leading brands already operate.

What connects the leading brands is not what they are, but how sustainability comes through in what consumers see, experience and understand.

ACT 1 FOUNDATION

What must be true before anything else begins.

01 Not an agenda. An amplifier.

02 Performance is the entry ticket.

03 You can't buy it in a quarter.

ACT 2 PROOF

How the position becomes credible.

04 Show it. Don't say it.

05 Don't just meet the expectation. Move it.

06 Honesty outperforms perfection.

ACT 3 EXPERIENCE

How it lands with people.

07 No penalty for the right choice.

08 The participation is the proof.

09 Inclusion is who you serve, not just who you cast.

ACT 4 RESONANCE

How it scales across voices and cultures.

10 Let creativity carry the conviction.

11 Creators translate what is hard to express.

12 Sustainability speaks with an accent.

A note on the examples in this section

The principles that follow are drawn from Kantar's analysis of the 62 brands that stood out across the Global Top 20 and country Top 5s. The brands highlighted under each principle are included because they help bring that principle to life, not because they only align to that one area. In practice, the strongest brands tend to perform well across multiple principles.

The interpretations and examples throughout this section reflect Kantar's read of the data and the brand experience. Where brands have also contributed through interviews or quotes, their voice is included to add perspective and practical depth. The brands participation helps contextualise the learning, but it does not influence the consumer-defined ranking or scores.

ACT 1: FOUNDATION

What must be true before anything else begins

The strongest brands in this ranking do not treat sustainability as a message layer added at the end. It starts further upstream than that. In the brands that lead, sustainability is built into what the brand is, how it performs, and how consistently it behaves over time.

This is why the first act is about foundation. Before sustainability can create trust or strengthen the brand, it has to make sense in the context of the brand, show up in the quality of what people buy, and be sustained long enough to feel credible. Without that, whatever attention sustainability generates may feel less relevant, less convincing, or more exposed to perceptions of greenwashing.

Together, they describe that base layer.

01. Not an agenda. An amplifier.

Sustainability works best when it lives inside the brand, not beside it. It should reinforce what the brand already does for people, not sit apart from it as a separate story.

02. Performance is the entry ticket.

The sustainable choice has to work as well as, or better than, the established alternative. Consumers may value sustainability, but they still expect the product or service to do its job properly.

03. You can't buy it in a quarter.

Trust builds through consistency. The brands that lead on sustainability are not those that arrived with the loudest campaign, but those that have made the same direction of travel visible over time.

Taken together, these principles show that sustainability becomes commercially powerful when it is not treated as an add-on. It has to be part of the brand's architecture. That is what gives the later acts, proof, experience and resonance, something solid to build on.



01 Not an agenda. An amplifier.

Sustainability works hardest when it strengthens what the brand already means to people. The strongest brands do not treat it as a separate agenda sitting beside the offer. They use it to sharpen the brand's core job, making what the brand already stands for feel more relevant, more distinctive, or more valuable in the world people are living in now.

When sustainability behaves like an add-on, consumers have to do the work of connecting it back to the brand. When it behaves like an amplifier, the connection feels obvious. Sustainability is not presented as an extra virtue or an adjacent programme. It becomes part of why the brand is chosen in the first place. This is why the principle looks different from one category to the next. For some brands, it redefines what "clean" or "care" looks like. For others, it deepens a role already associated with access, fairness or regeneration. The common thread is not the type of action, but the fact that sustainability strengthens the brand's existing meaning rather than pulling it in a different direction.

Brands that help bring this principle to life

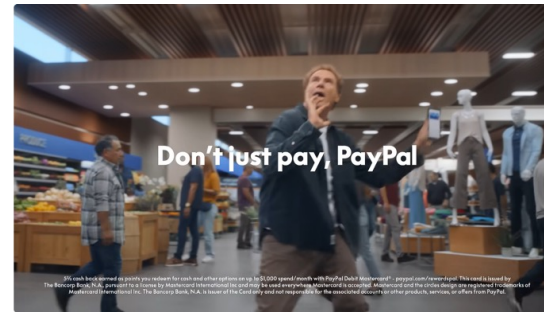
Ecover is a clear illustration of this principle. The brand treats "clean" as something that extends beyond household performance into ingredients, packaging, refills and waste reduction. Refill is not presented as a side initiative, but as part of how the brand works, with official refill formats, a refill station network in the UK, and long-running brand language built around living clean.

You can see that in [Ecover's website](#), in its [refill system](#), and in the film [Laundry Against Landfill](#), which turns better laundry performance into a broader sustainability argument about keeping clothes in use for longer.



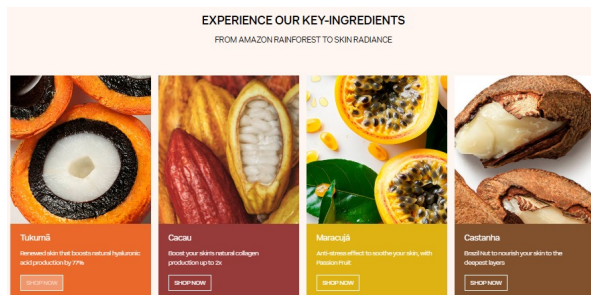
PayPal shows that this principle is not only environmental. Inclusion and economic opportunity sit close to the centre of how the brand describes its role, from building a more inclusive global economy to supporting financial inclusion and helping small businesses participate in the digital economy. Financial inclusion is not beside the brand, it is the brand.

PayPal's "Celebrating Businesses" films make that role tangible through real stories, including [Indie South x PayPal](#) and [I'm The Chef Too! x PayPal](#). Alongside that, [PayPal's website](#) and their [Everywhere](#) campaign shows how the brand presents participation as something practical and everyday: helping people pay, get paid and manage money in ways that fit their lives.



Natura offers a third version of the same pattern. The official Natura site foregrounds beauty from the Brazilian Amazon rainforest and presents Amazon-derived ingredients as a defining part of the product experience. The sustainability dimension is not detached from the offer. It is embedded in where the products come from, how they are framed, and what the brand is seen to stand for.

That comes through clearly on [Natura - Beauty from the Amazon](#), in the innovation story behind [Natura Ekos Açaí](#), and in [Regeneração Natura - Relações Amazônicas](#), which shows how the brand's operational model becomes part of the product meaning.



M&S

Hear from M&S

Andrew Hill, Head of Marketing at M&S, and Karina O’Gorman, Head of ESG, shared their perspective with us directly. What comes through is a brand where sustainability is not a separate workstream but the way the core business operates.

Andy on why sustainability works when it connects to what customers already value: “Pick the right product, make it relevant to your audience, particularly in the world of sustainability, keep it positive. It’s not about guilt, it’s not about what customers shouldn’t do, it’s about what they should do, how it’ll make their lives better, as well as doing the right thing by the planet and by the communities that they live within. The real thing on social media is just pace. You’ve got to be able to tell a story really quickly. And boil things down.”

And the stories are there because the relationships are real. Andy described standing in an asparagus field with the Chin family, who have supplied M&S for generations: “There is an amazing quality story there and sustainability story there about regenerative agriculture, what they’re putting back into the soil.” The sustainability story is not separate from the product story. It is the product story. Regenerative farming practices, multi-generational supplier relationships, British sourcing: these are the things that make M&S food trusted. Sustainability amplifies that trust. It does not compete with it.

Karina reinforced the partnership that makes it credible: “It’s really important that you understand the technical remit behind the

[▶ Watch the interview here](#)



sustainability ambitions and stories, that you’ve done all your due diligence, your substantiation, you’re really confident in those stories that you want to tell. But then it’s how you partner really well with your marketing. It’s so important to have that connection between you and the marketing team to then look at how do you tell that story in an engaging way that’s accurate, but also engaging to those customers.”

This is the operational heart of Principle 01. At M&S, sustainability is not handed to marketing as a brief. It is built between ESG and marketing as a shared practice. The stories are credible because the ESG team has done the substantiation. They land because the marketing team knows how to connect them to what customers already care about.

01 Not an agenda. An amplifier.

What brands should take from this

Start with a simple question: what is the brand's core job, and where does sustainability genuinely strengthen it? If the answer requires a long explanation, the two are probably still running on parallel tracks. If it feels obvious, you are already closer to making sustainability a source of meaning, difference and trust. The brands in this section did not set out to be "sustainable brands." They found the place where sustainability made their existing proposition sharper, and they committed to it.

02 Performance is the entry ticket.

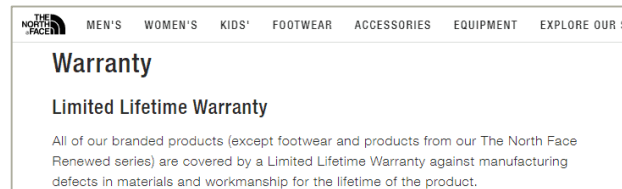
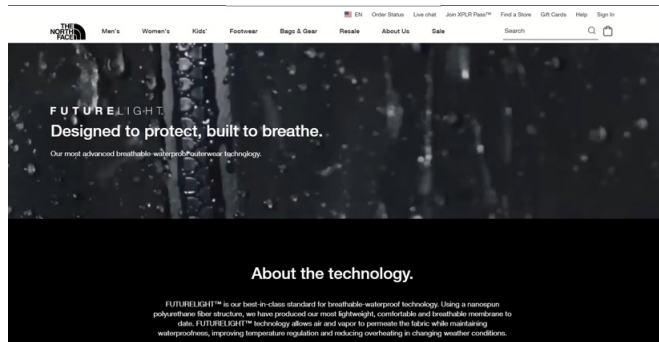
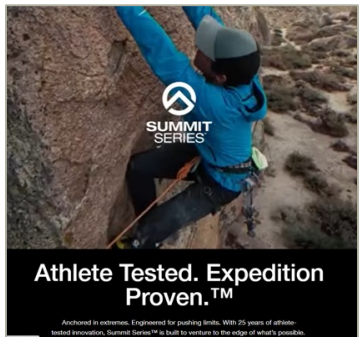
Sustainability credentials do not drive choice if the product does not work. The sustainable version must work as well as, or better than, the conventional one. In every category, performance earns the shelf first. Sustainability earns the preference after that. You cannot reverse the order.

Consumers may admire a brand's intentions, but they still expect the product or service to do its job properly. If taste, comfort, durability, safety or ease of use falls away, the sustainability story becomes fragile. The strongest brands remove that tension. They show that the more sustainable option is not a compromise. It is the version you would choose anyway.

Brands that help bring this principle to life

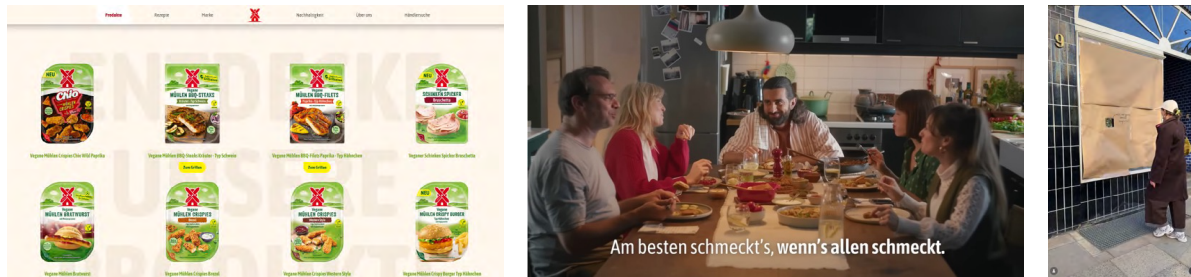
The North Face is a clear illustration of this principle. In our read, the brand does not ask consumers to trade technical performance for sustainability. It uses performance to make the sustainability claim credible. In outdoor gear, that matters more than almost anywhere else. If the jacket fails on a mountain, nothing else matters.

Useful assets include [Summit Series](#), which the brand describes as "Athlete Tested. Expedition Proven.". [FUTURELIGHT fabric technology](#), The North Face proprietary fabric technology. It is made from 90% recycled materials and uses a nanospinning process that creates microscopic pores: large enough to let vapour escape, too small to let water in. It was tested on Everest, on Lhotse, on Cho Oyu, by their athlete team, before it ever reached a shop. The point is: the recycled material doesn't just match conventional performance. In breathability, it exceeds it. And [The North Face warranty](#), which makes durability and long product life tangible through the brand's own policy language.



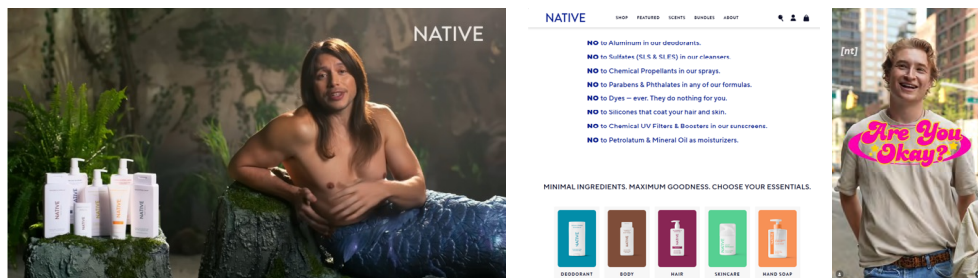
Rügenwalder Mühle (Germany) brings the same idea to life through taste, cooking and shared food experiences. A heritage meat brand does not become a plant-based leader by asking people to lower their expectations. It does it by making products familiar, desirable and easy to adopt. This is a good example of sustainability succeeding because the product experience is strong enough to carry people across.

That comes through clearly in [Rügenwalder Mühle's vegan product range](#), which presents plant-based products as part of a broad, mainstream offer rather than a niche alternative. It also comes through in [this brand film](#), which captures the role of taste, cooking and food-sharing in making the proposition feel easy and desirable, and in [Rügenwalder Mühle's Instagram](#), where the products are consistently shown in appetising, everyday use.



Native (USA) does the same in personal care. Clean ingredients alone are not enough if the product does not perform where it matters most. What makes the proposition credible is the insistence that ingredient choices and everyday efficacy belong together. The brand's value comes from removing the assumed trade-off between "clean" and "effective".

That comes through clearly in [The Merman: Presented by Native](#), which presents Native haircare as paraben-free, sulfate-free and silicone-free while keeping product appeal and enjoyment front and centre, and in [The Scentaur: Presented by Native](#), which addresses the familiar concern that natural deodorant does not really work by stating that Native is an aluminium-free deodorant that actually works. The same balance is reinforced on [Native's ingredients page](#), where the brand sets out its ingredient choices in a simple and concrete way, and in this [Native Instagram reel](#), which shows the product in use through a more everyday, social format.



02 Performance is the entry ticket.

What brands should take from this

Before building the sustainability story, put the product to the test. Can the sustainable version stand comparison with the conventional benchmark on the dimensions consumers care about most: taste, comfort, durability, safety, ease of use? If it falls short on any of those, the sustainability claim will not survive first use. Consumers may try something once because it is better for the planet. They come back because it is better for them. That is the sequence these brands have figured out.



03 You can't buy it in a quarter.

Sustainability trust is not built in a campaign cycle. It compounds through consistent commitment over time. The brands that stand out on this principle have not treated sustainability as a rotating theme or a short-term communications layer. They have built it into the way the brand behaves, year after year, so that trust deepens rather than resets.

What matters here is not longevity on its own, but continuity of intent. The leading brands keep returning to the same underlying belief, while finding new ways to express it as expectations evolve. That consistency makes the brand easier to understand, easier to trust and harder to dismiss as opportunistic.

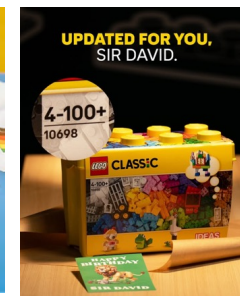
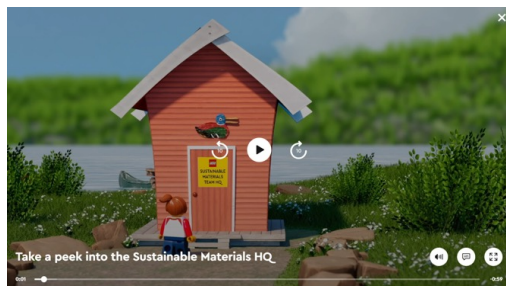
Brands that help bring this principle to life

LEGO is a particularly strong example of this principle because the brand has built trust through continuity. The system introduced in 1958 created the compatibility that still defines LEGO today: bricks are designed to fit, last and stay in play across generations. That matters because, although LEGO bricks are plastic, people are more willing to accept that reality when the product is built to be kept, reused and handed on rather than treated as disposable.

That long-term logic gives newer sustainability efforts real credibility. The [stud-and-tube principle](#) anchors the story in durability and fit, while [LEGO Replay](#) extends that logic into circularity by keeping bricks in play through donation and reuse. LEGO's sustainable materials work makes the same point from another angle: the company is changing materials, but without compromising the safety, quality and fit that make the system endure, as shown in this [LEGO materials video](#).

Consistency here is not only about materials. It is also about values. That is why [Everyone is Awesome](#) is worth including. The set suggests a company where inclusion has been embedded deeply enough over time to move naturally from internal culture into the product itself.

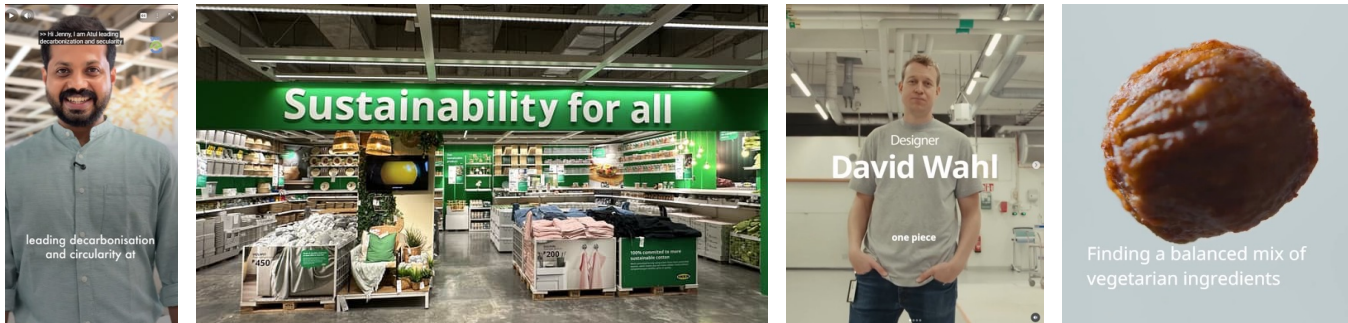
And as a lighter and humorous connection to their value, the [David post](#) shows how comfortably LEGO can carry its distinctive voice into social content.



IKEA (India) is a strong example of this principle because the brand started from a clear idea and has kept building on it over time. Sustainability is not a separate programme layered onto the business. It sits within a broader model that combines good design, everyday usefulness, affordability and responsibility, and has continued to evolve through renewable energy, circular design, responsible sourcing, healthy and sustainable living, and fair and equal practices.

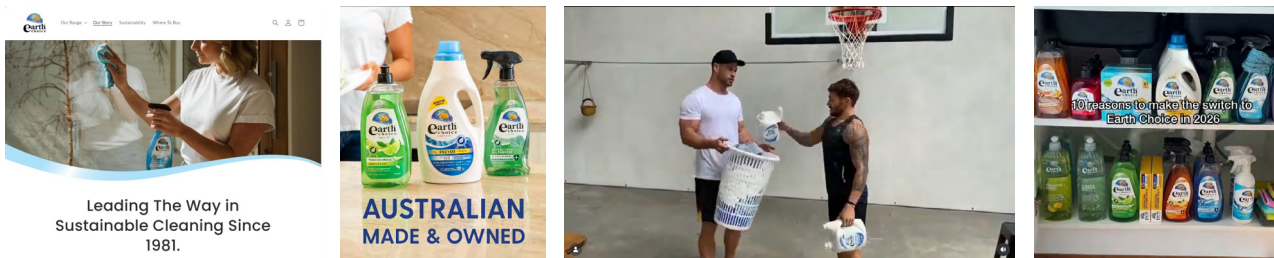
Among the expressions shoppers are most likely to notice are [Sustainable Everyday](#) in store, and the shift from IKEA's iconic meatballs to [plant balls](#), which keep the product familiar while making it more sustainable. A more design-led expression of the same philosophy comes through in [this Instagram post](#).

In India, the same idea has been adapted rather than diluted. IKEA has been sourcing from India for over 50 years, works with more than 110,000 Indian farmers on sustainable cotton sourcing, and partners with [social entrepreneurs in India](#), employing local artisans, mostly women in rural communities with previously limited access to paid work and sustainable income. The breadth of that approach comes through well in [this IKEA India short](#), which gives a broader view of decarbonisation and circularity in market.



Earth Choice (Australia) is a good example of how consistency can build trust in an everyday category. The brand's [story page](#) roots the proposition in a long-standing commitment to sustainable cleaning since 1981, which helps make the brand feel established rather than newly converted. That history gives weight to the idea that sustainability is not a campaign layer here, but part of how the brand has been built over time.

That continuity also gives the brand room to express itself in different ways without losing coherence. The playful [ultimate home workout reel](#), featuring Chris Hemsworth and Zoco Body Pro, gives the brand a very Australian, self-aware expression, while the ["10 reasons to make the switch" reel](#) turns the same long-term sustainability stance into something simple, practical and easy to act on.





Hear from Terres d'Aventure

Eric Balian, Directeur Général of Terres d'Aventure, shared his perspective with us directly. His framing captures what half a century of the same conviction sounds like.

"Sustainability has been part of Terres d'Aventure's DNA since the very beginning. Our brand was born in 1976, 50 years ago, from a life-changing desert trek experience from our founder, and a very strong conviction that the best way to discover the world was to move through it slowly: by foot, by walking, by bike, by kayaking, by any kind of decarbonised transportation mean, and whatever brings you closer to the nature, the people and the places."

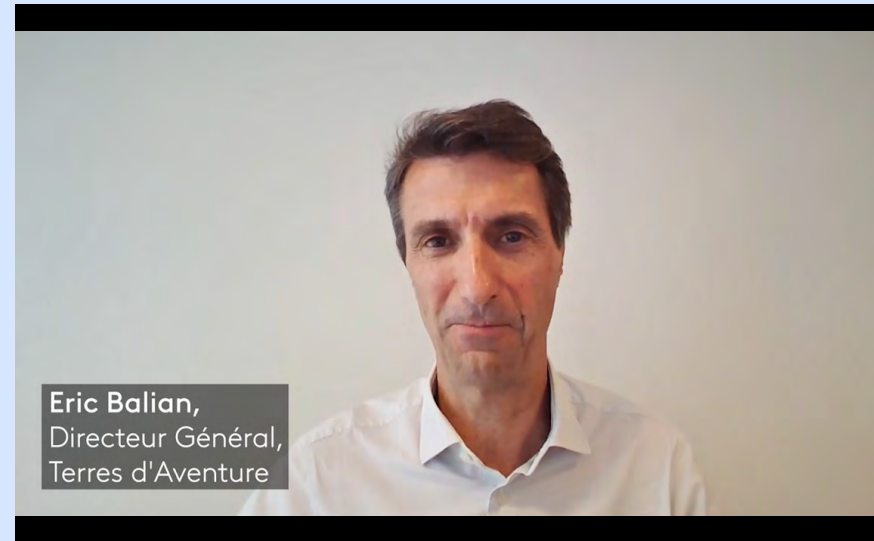
"And what is interesting is that this was never driven by a sustainability agenda or marketing trend. And by the way, 50 years ago, the sustainability word was not even existing. It was simply our vision of what nice and great travel could be."

On what people actually notice, Eric was clear: "People recognise authenticity. At Terres d'Aventure, sustainability is not something we try to ride on top of our product. We like to say that we are sustainable by design. It is embedded in the way we design our trips. Soft mobility, smaller groups, local guides, immersion in the nature, partnership with local communities, making sure that we use local products in the food, in the transportation needs. These are not communication. These are the way our experience and our tours are organised."

"Historically speaking, our culture was not to explain what we were doing, but just to do it. We never approached this topic as marketing opportunities because they were simply not marketing opportunities at this time. As a result, our travellers experienced directly what we were doing rather than having it advertised."

"Communication, even if we do a little bit more now, simply expresses the reality and does not replace the reality. What is important to us is doing the things, being consistent, and explaining what we do."

[▶ Watch the interview here](#)



And his advice to other brands reinforced the principle: "Do only what you are really convinced about and back every claim with proof. Consumers are today really informed and increasingly sensitive and sceptical about what brands say about sustainability. They really can feel if you're not authentic in your claim. So sustainability only resonates when people can see it reflected for real in the product, in the experience, and the decisions the company makes."

"Do not wait until you are perfect on these topics. Sustainability is a never-ending subject. It's a continuous improvement process. I don't think that consumers expect perfection. Nobody's perfect in this respect. So they expect honesty, and what matters is being transparent about what you are doing, what is your progress, what are your challenges, and how you want to address these challenges."

03 You can't buy it in a quarter.

What brands should take from this

Don't refresh your sustainability priorities too often. A new initiative each year, a new theme each quarter, a new partnership each campaign cycle. The brands that perform strongly here did the opposite. They picked a small number of commitments and stayed with them long enough for people to believe them. If you are asking whether your sustainability story is being built to last or simply built to land, that is the right question. The signal strengthens through repetition, not reinvention.

ACT 2: PROOF

How the position becomes credible

If Act 1 is about what must be true, Act 2 is about what people can actually see.

This is where sustainability becomes legible to people. In the brands that lead, proof does not rest on claims alone. It shows up in things consumers can recognise and make sense of: the product itself, the service, the packaging, the retail experience, the choices a brand makes visible, and the way it talks about progress without over-claiming.

Credibility is not created by saying more. It is created when what a brand communicates is supported by what people can observe, understand and believe. The brands in this ranking do not all prove sustainability in the same way, but they do make it tangible. They give consumers something more solid than a promise.

Each of the three principles explores a different facet of how that proof takes shape.

04. Show it. Don't say it.

The strongest proof is often built into the product, the service or the experience itself. Consumers are more likely to trust what they can see than what they are simply told.

05. Don't just meet the expectation. Move it.

Leading brands do not stop at hygiene and meeting the responsibility threshold. They raise the bar in ways that feel natural and credible to consumers, and in doing so they create difference that competitors may struggle to match.

06. Honesty outperforms perfection.

Consumers do not expect brands to have solved everything. But they do respond to signals of honesty: naming trade-offs, showing progress, and avoiding the polished certainty that often triggers scepticism.

Proof is not about saying more. It is about making the right things visible in ways that feel real. When that happens, sustainability stops being a claim and becomes something consumers are prepared to believe..



04 Show it. Don't say it.

The most credible sustainability communication is often the thing people can see, touch or experience for themselves. It is not only what the brand says in copy. It is what the product looks like on shelf, how the service feels in use, or what the customer notices in the course of everyday life. The strongest brands make sustainability legible before anyone has to read a detailed explanation.

Visible proof does more work than abstract claim. A cue on pack, a building that is still open, a product choice that removes friction, or an offer that reaches people directly can all signal the brand's contribution more powerfully than a separate sustainability message. This is why "showing it" is not limited to packaging. It can mean a branch, a payment, a product feature, or a design decision that makes the brand's values tangible in use.

Brands that help bring this principle to life

Frosch is a clear expression of this principle because the frog on the bottle really is the message. By summer 2025, [the brand says](#) it had brought **1 billion bottles made from 100% recycled plastic** to market, and that circular logic is built directly into what shoppers see first. You read "eco" before you read the label. It is one of the most legible sustainability cues in European retail.

Let's zoom in on one of the many products, such as [Sensitive Detergent Aloe Vera](#). The bottle brings together the frog identity with prominent front-of-pack cues that stand out on shelf, including **Ecolabel certification** and sensitive-skin signals such as **dermatologically tested** and **hypoallergenic**. The product itself is presented as delivering **high washing power**, which is exactly why the pack works so well: it signals ecology and performance at the same time, before any detailed explanation is needed.

That same logic carries into communications. The [2025 campaign film](#) develops the connection between the power of nature and high-performance formulas, extending the same message beyond the pack into a broader brand world.



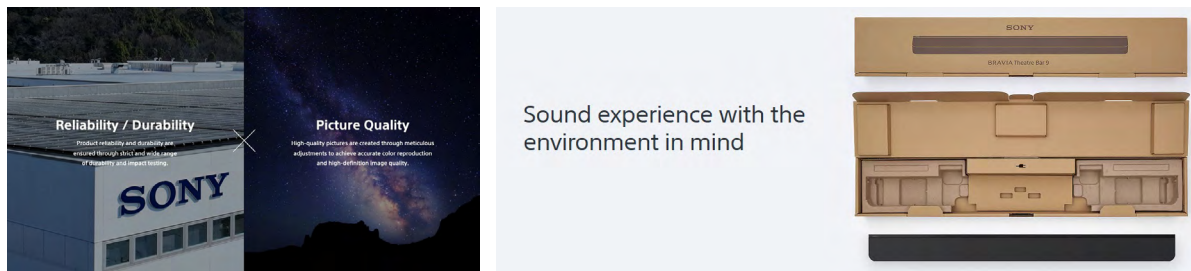
CERTIFICATES



Sony works well for this principle because products built to last can become the sustainability signal. In categories such as electronics, durability is often one of the clearest ways people infer responsible design: if a product is engineered for long-term performance, that already communicates something important before any sustainability claim is read.

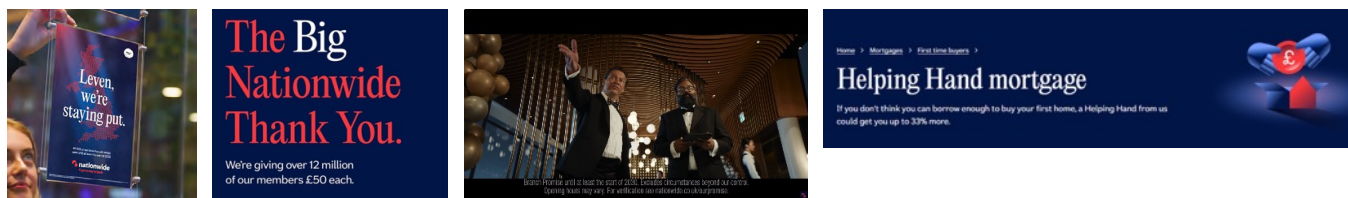
Sony makes that logic explicit in its [commitment to reliability and quality for BRAVIA Professional Displays](#). The page describes rigorous testing for environmental durability, installation conditions, long-term reliability, and transport robustness, and says Sony applies design testing standards throughout the process from materials selection to design and production to ensure products can withstand demanding applications. That makes durability more than a background engineering claim. It becomes part of the visible proof of quality and longevity.

That same logic carries into the product itself. On its [sustainable audio page](#), Sony says it has spent years developing a unique recycled plastic that is both environmentally conscious and conducive to creating high-quality audio products. The page also points to recycled plastics in home audio components, recycled fabric, and lower-plastic packaging. In other words, the signal is not only that the product lasts, but that the materials and packaging have been deliberately engineered to support that quality without separating sustainability from performance.



Nationwide (UK) is a powerful example because it shows how this applies beyond physical products and packs. For Nationwide, the proof is on the high street. Nationwide's [Branch Promise](#) states that all **605 branches** will remain open until at least the start of 2030. In a category shaped by closures, the building itself becomes the cue. The "we're staying put" message is not a sustainability report. It is a physical act of commitment that customers can see in their own town.

The same is true of the benefits members feel directly. On its [Fairer Share](#) page, Nationwide says that over **4 million eligible members** will receive a **£100** payment in 2026. And on its [Helping Hand mortgage](#), it says eligible first-time buyers could borrow **up to 33% more**. These are not distant values statements. They are practical, visible outcomes that people experience in their bank balance or in their ability to buy a home. That logic comes together particularly well in the film [If you haven't seen the news...](#) It works because it wraps multiple proof points into one simple story: this is a brand whose values show up in ways customers can actually see and feel.





Hear from Nationwide

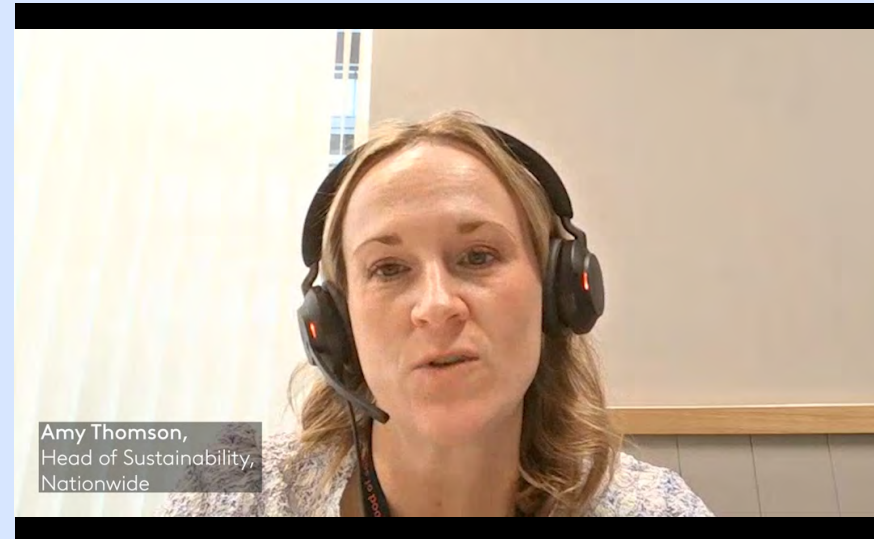
Graham Lloyd, Director of Strategy, Performance and Sustainability, and Amy Thomson, Head of Strategy Development at Nationwide, shared their perspective with us directly. Their framing captures what happens when a brand makes sustainability something customers can see and feel rather than something they have to read about.

Graham on what customers actually experience: "Our Fairer Share payment is phenomenal. Over 4 million members will receive the 100 pound Fairer Share payments in the coming weeks. We have our branch promise to keep every one of our branches open until at least the start of 2030. We've now got the UK's largest single branch network." And the commercial proof that showing works: "What you see when you connect some of these things like Fairer Share and the branch promise and service, people really want to bank with us. The last 12 months, we've had market leading mortgage growth, market leading growth in retail deposits. And we are the most switched to banking provider for current accounts. So what we stand for, our social purpose, making it clear, making it tangible, it's really real for people. And actually it means they want to do more with us."

Amy on the connection between initiatives and reach: "We also connect initiatives to better support reach and impact. We've funded 30 admiral nurse roles that provide dementia specialist support through Dementia UK helpline and in our branches through our branch clinics. In 2025 alone, we booked over 1,400 dementia clinic appointments in more than 120 of our branches across the UK." The branch is not just staying open. It is becoming a place where social impact is delivered face to face.

Graham on what sits behind the visible proof: "That is all predicated on culture. Culture is key, driving that inclusive culture, driving a culture

[▶ Watch the interview here](#)



where colleagues feel what customers feel. Our colleagues are our secret sauce at Nationwide. We are a human organisation."

And Amy's advice to other brands: "Be your authentic self. Deliver sustainability in a way that suits your business model and how you think about being a responsible business. Don't think of it as a bolt on, think of it as an enabler and integrate it into your BAU practices wherever possible, so through your culture, your strategy, and ultimately how you want to show up as a business."

04 Show it. Don't say it.

What brands should take from this

Run the cue audit. Ask whether someone encountering your brand for the first time could understand your sustainability contribution before reading detailed copy. If the answer is no, you may still be explaining too much and showing too little.

What that cue looks like will vary. In home care it may be the pack and its certifications. In electronics it may be durability, materials and engineering choices. In banking it may be a branch that remains open, money that lands in an account, or a product that makes access easier. The format matters less than the question: is the proof built into the customer experience, or does it live somewhere else entirely?

05 Don't just meet the expectation. Move it.

This principle is about the difference between meeting the responsibility threshold and raising the category bar. The strongest brands do not stop at doing what people now expect as basic hygiene. They make moves that shift what "good" looks like in the category, and in doing so they create difference that competitors may struggle to match.

What matters here is not novelty for its own sake. It is whether the brand does something that feels like a meaningful step forward for the category itself. In some sectors that means changing what the product makes possible. In others it means redesigning the offer so that people who were previously excluded are now served properly. Either way, the brand is not simply complying with expectation. It is changing it.

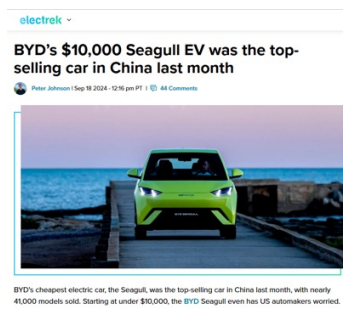
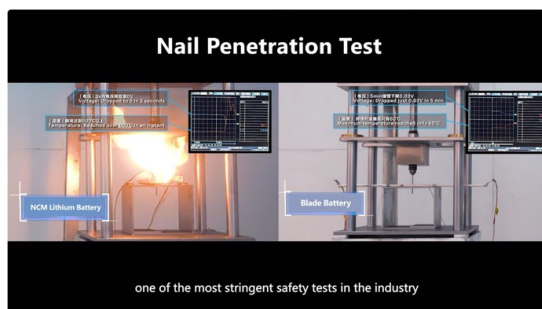
Brands that help bring this principle to life

BYD is a strong example of this principle because the brand did not enter the EV market simply to compete. It entered to reset what the category has to deliver. It is not just meeting the expectation around electric mobility. It is moving it.

Start with safety. BYD developed the Blade Battery using lithium iron phosphate chemistry, arranged in a flat blade-like structure. To prove its point, the company highlighted the [nail penetration test](#) or the [Blade Battery 2.0: 700°C Extreme Temperature Test](#) to show how it exceeds safety standards, making the 'old' one look inadequate.

It's not only about safety, in March 2026, BYD unveiled Blade Battery 2.0, saying it could charge from 10% to 97% in nine minutes and support ranges of more than 1,000 km under the Chinese CLTC test. A breakthrough that brings fast, reliable EV charging to every climate, removing another barrier to global electrification. Watch it here: [-30°C Charging Test: BYD FLASH Charge to 97% in 12 Mins.](#)

Then look at price and access. The BYD Seagull starts at 69,800 yuan, or about US\$9,700, and offers up to 252 miles (405 km) of CLTC range. By June 2025, BYD said the Seagull, also sold overseas as the Dolphin Mini, had passed 1 million sales in 27 months. That is not just making an EV cheaper. It is changing what affordable can mean in the category.



C'est qui le Patron?! is a strong expression of this principle because it does not just offer a fairer food product. It changes how value is set in the category. Producers indicate the remuneration they need to live with dignity, consumers vote on the product criteria and the fair price they are willing to pay, and the decisions are then checked through direct transparency and verification. In other words, the brand moves beyond ethical positioning into shared rule-setting. It shifts the question from "which brand makes the best claim?" to "who actually lets consumers shape what fairness looks like?"

What makes that powerful is that the mechanism is visible in the offer itself. [On its website, C'est qui le Patron?!](#) explains that consumers collectively vote on the criteria and the price, that the cooperative works on the basis of 1 euro = 1 share = 1 vote, and that more than 41,000 voters helped create new products in 2025. Product pages then make the model tangible by showing the consumer-voted recommended price and, in some cases, the amount that goes directly to the producer. That means the brand is not simply meeting the expectation of "better" food. It is raising the bar by making fairness, transparency and co-construction part of the product itself. You can see the model [in this video in french](#) and in this [Instagram reel in French](#).



Neoenergia is a strong expression of this principle because it does not position the energy transition as a distant infrastructure story. It brings it into culture and public experience. In 2024, the company used its partnership with [Rock in Rio](#) to make decarbonisation visible at one of Brazil's biggest cultural events. It is raising the bar by turning the energy transition into something people can actually see and experience.

What makes this especially relevant is that Neoenergia connects those visible actions to a broader role in Brazil's energy transition. On its [about page](#), the company describes itself as a pioneer in the country's energy transition and says that approximately **90% of its energy matrix is clean and renewable**. This video, [Neoenergia é a parceira de sustentabilidade do Rock in Rio!](#) (in Portuguese), shows translated it all into something immediate and engaging for the public. In other words, Neoenergia does not just say it is part of the transition. It stages that transition in ways consumers can recognise in everyday culture.

Documentary series "On the Energy Route"

In 2024, the partnership with Rock in Rio generated the documentary series "On the Energy Route", which focuses behind the scenes of the construction of the Rock City with a focus on sustainability. The series of episodes presents the features, challenges for decarbonisation, from engineering processes to the implementation of green technologies, with testimonials from characters that make the festival possible.

- Mangueira no Festival | Ep 1 | No Rio
- Um festival high-tech | Ep 2 | No Rio
- Uma Constelação no Rio | Ep 3 | No Rio
- Por um mundo melhor. Bora decarbonizar?



Hear from Neoenergia

Neoenergia shared their perspective with us directly. Their framing explains why the company chose to move well beyond what an energy provider is expected to do.

On what sets them apart: “What sets us apart in the eyes of Brazilian consumers is precisely our ability to combine operational excellence, innovation and socio-environmental commitment, putting sustainability into practice every day.” That daily practice includes BRL 6.5 billion invested in distribution in 2025 alone, focused on network expansion, digitalisation and climate resilience. But it also includes a green hydrogen pilot plant in Brasília that has already produced its first molecule, and “Noronha Verde”, a BRL 350 million initiative to decarbonise energy generation on the archipelago of Fernando de Noronha through more than 30,000 photovoltaic solar panels integrated with battery storage systems.

On the community initiatives consumers feel most: “Community-level initiatives such as Vale Luz are those that generate the greatest perceived impact among consumers, as they establish a direct and immediate link between sustainable behaviour and economic benefits.” Last year, the programme granted bill credits totalling over BRL 1.5 million in exchange for recyclable materials directed to cooperatives and recycling industries. Alongside that, more than 350,000 inefficient light bulbs were replaced with LED technology and 630 old refrigerators were replaced in low-income households in 2025, generating long-term savings without requiring behavioural changes after installation. As they put it: “More than just a concept, sustainability proves its value when it transforms people’s daily lives.”

Eduardo Capelastegui
CEO of Neoenergia



On connecting sustainability to culture: “In Brazil, we see music as one of the most effective ways to share relevant values from our operations, while also promoting culture and creating value for the regions where we operate.” That conviction led to partnerships with Rock in Rio, The Town and Lollapalooza, and to commissioning exclusive songs from artists including Carlinhos Brown, Alceu Valença and Baiana System. The result: “We have been able to deliberately engage millions of Brazilians and make the energy transition more tangible and relevant in their daily lives.”

On social inclusion: “The School of Electricians for Women exemplifies how social inclusion is a central element in enabling a fair and effective energy transition.” Established in 2013, the programme introduced women-only classes in 2019. Since then, more than 1,300 women have been trained and over 1,000 hired. In 2025 alone, 388 women graduated and 232 secured employment. The programme has been recognised by both the World Economic Forum and the Women’s Empowerment Principles as a benchmark in diversity, equity and inclusion. “When impact is visible, sustainability moves beyond rhetoric and becomes recognised as transformation.”

And their advice to other brands: “Make sustainability transparent, measurable, and clearly connected to the value customers perceive in their daily lives. Initiatives are not treated as isolated messages, but as structured commitments, supported by targets, continuous monitoring, and oversight from senior leadership.” And: “When sustainability is not linked to solid results, clear targets, and tangible benefits, it tends to be perceived as abstract, weakening trust and engagement.”

05 Don't just meet the expectation. Move it.

What brands should take from this

Map the category baseline. Write down what a responsible brand in your space is already expected to do. Then identify the move that would make competitors look as though they are still working to an older standard. That move will look different depending on the category. In food, it may mean changing who gets to define quality, fairness and price. In energy, it may mean making the transition tangible in public life. In automotive, it may mean removing the trade-offs that people assumed were permanent. If sustainability only earns your brand a passing grade, it may protect credibility. If it changes what people expect from the category, it starts to build real difference.



06 Honesty outperforms perfection.

Brands do not earn trust on sustainability by sounding flawless. In a climate of high scepticism, the stronger signal is often candour: naming what is hard, showing the limits, and resisting the temptation to smooth every rough edge out of the story. 57% of people globally say they have seen false or misleading information about what brands are doing on sustainability. People are not looking for the most impressive claims. They are looking for the most honest ones.

Across the ranking, we see three distinct flavours of this.

Brands that help bring this principle to life



Apple put its CEO in front of a personified Mother Nature, played by Octavia Spencer, to report on the company’s environmental progress at its September 2023 keynote. The five-minute video walked through Apple’s commitments on recycled materials, clean electricity and carbon-neutral manufacturing. Tim Cook’s closing line: “There’s still a lot more work to do.” [The video gathered nearly 30 million views on X](#) alone, generating widespread debate and scrutiny. What Apple did was take the contents of a dense shareholder sustainability report and turn it into something millions of people could watch, share and challenge. Deliberate exposure to scrutiny is a form of honesty.

M&S launched Plan A in 2007 with a tagline: “Because there is no Plan B.” Nineteen years later, they are still reporting against it. Their [Plan A 2025 Commitments document](#) states it plainly: “Even though we’ve completed 296 individual commitments, we’ve learnt just as much from the 21 commitments we’ve failed to deliver.” That is institutional honesty. Not a campaign moment, but a governance structure that makes transparency unavoidable. The fact that Plan A still carries the same name after nearly two decades is itself a signal:

the brand did not rebrand its way out of the commitments it could not meet. It published them.

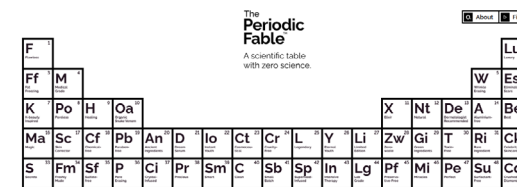
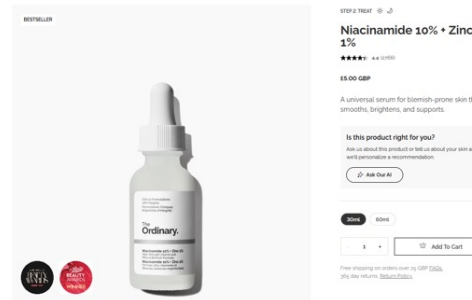
But the brand that makes this principle most vivid is **The Ordinary**. Number two in the global ranking. The Ordinary did not add honesty to a beauty brand. It built a beauty brand out of honesty.

In October 2025, the brand launched [The Periodic Fable](#), created with Uncommon Creative Studio: a fake periodic table of “elements with zero science.” Skincare buzzwords like “poreless,” “medical grade,” “fat freezing” and “eternal youth” were turned into chemical-looking symbols. [A dystopian-style film showed skincare users trapped in an endless cycle of rituals](#), reciting fabricated elements until one student breaks from the trance. The campaign ran across out-of-home, social and influencer channels in the UK, US and Canada, supported by a dedicated website where users could click through each “element” to uncover the lack of scientific basis behind it. The Ordinary was exposing pseudoscience by using the beauty industry’s own visual language against it.

Then in May 2026, The Ordinary opened [The Markup Marché](#): a fake supermarket that appeared across six cities including Toronto, London, Paris, São Paulo, Mexico City and Melbourne. Inside, everyday groceries were relabelled using beauty-industry language and priced accordingly. A banana became an “All-Natural Magical Energy-Boosting Bar” at \$175.90. An avocado became a “100% Natural Glow-Enhancing Vitality Orb” at \$305.90. A roll of toilet paper was rebranded as a “High-Retention Cleansing Cylinder” for \$96.20. The slogan: “Buy the ingredients, not the hype.” Visitors could generate their own exaggerated ingredient labels at a “naming department” and try drinks repackaged with skincare-style buzzwords at The Jargon Bar. According to the brand, some luxury beauty products carry markups as high as 700%. The Markup Marché turned that statistic into something you could walk through.

And underpinning all of it: the product itself. Clinical packaging. No aspirational language. The [product name is the ingredient list](#): “Niacinamide 10% + Zinc 1%.” You know exactly what you are buying and exactly what it costs. That honesty is not a campaign moment. It is permanent and on every bottle and in every store.

The Ordinary is number two in this ranking not because it claims to be perfect but because it built its entire brand on showing what others hide.





Hear from Frosta

Marieke Anton, Senior Brand Manager at Frosta, shared her perspective with us directly. Her account captures what honesty looks like when it nearly destroys the company before it saves it.

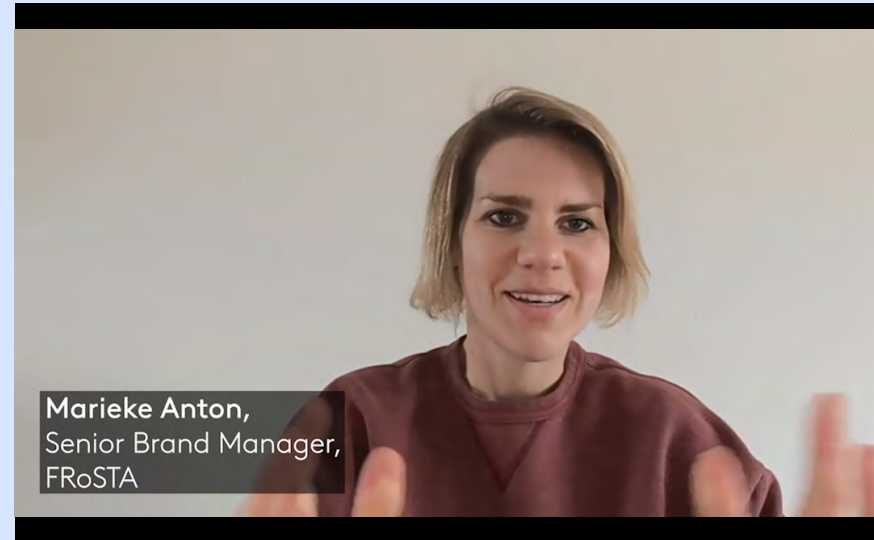
“After finishing school, our owner and CEO Felix Ahlers trained under two-star chef Emile Tabulieau at the Hotel Le Bistro in Paris and then worked at the Michelin-starred restaurant in Rome. And after working a few other places he joined the family business Frosta and was surprised to see that Frosta products were made so differently from what he had learned during his time as a chef. Frosta’s products were full of additives and flavour enhancers and none of the company’s employees enjoyed eating them. So in 2003 Felix said: we make real food or none at all. And that is how the Purity Promise came to be.”

The consequences were immediate: “The 2003 financial results were the worst in the company’s history. The company posted a loss of 8 million and sales of the Frosta brand plummeted by 40 percent. And the company was kept afloat only with personal loans.” Today, double-digit growth.

On what radical transparency actually means in practice: “For us, no tricks, no secrets means applying transparency in a very literal way, not just talking about it. We aim to make information accessible and verifiable, whether it’s our carbon footprint, ingredient origins or supply chains. Sometimes even the reduction in the weight of our packets. Being transparent also means showing where things are not perfect yet and where there’s still work to do and space for improvement.”

On what works with consumers: “What works best is keeping sustainability concrete and easy to understand. Simple things like a clear ingredient list or clear origin labelling help make it visible and relevant in the moment of purchase. However, the more transparent and open you are, the more

[▶ Watch the interview here](#)



questions a consumer will naturally ask. So you need to be prepared for this and you need to take the time to address the questions.”

On the advantage of being a heritage brand that transformed rather than a purpose-native brand: “One advantage is credibility through progress. We can demonstrate real change over time rather than starting from a perfect position.” And her advice to other brands landed the principle: “Stay consistent and make sustainability tangible at the product level. It’s not about saying the right things once, but about continuously showing what you actually do in ways consumers can understand and act on. In the end it is less about perfection and more about persistence.”

As Marieke put it at the close: “The Purity Promise almost killed Frosta in 2003. Sustainability pays off over time. Maybe we can summarise it like that.”

06 Honesty outperforms perfection.

What brands should take from this

Run the honesty audit. Not “what would be embarrassing to admit” but “what do consumers already suspect, and would they trust you more for confirming it?”

The three examples here represent three different scales of honesty. Apple opened itself to public scrutiny through creative storytelling. M&S built a governance structure that forces transparency over time. The Ordinary made honesty the product, the packaging, the pricing and the campaign, all at once. The version that fits your brand will depend on where you are. But the starting point is the same: find the thing the industry is quietly avoiding, and be the brand that says it out loud.



ACT 3: EXPERIENCE

How sustainability lands with people

The first two acts are about getting sustainability right inside the brand. This act is about what happens when it meets real life.

Even a credible sustainability position will struggle if it asks too much of people, feels out of reach, or does not connect with how they actually live. Showing proof is necessary but not sufficient. They have also made the sustainable choice feel realistic, participatory, and wide enough for different people to see themselves in it.

07. No penalty for the right choice.

The better choice cannot feel like the harder choice. Leading brands reduce trade-offs around price, effort, access or performance so that sustainability feels easier to adopt.

08. The participant is the proof.

Sustainability becomes more powerful when consumers can play a role in it directly. Participation turns a brand's actions into something people experience for themselves.

09. Inclusion is who you serve, not just who you cast.

The brands that lead here do not treat inclusion as a communications cue alone. They build it into what they offer, who it works for, and how widely people can see themselves in the experience.



07 No penalty for the right choice.

The better choice cannot feel like the harder choice. If the sustainable version costs more, works less well, or takes more effort to find, consumers face a penalty for doing the right thing. Across categories, the leading brands have found ways to remove that penalty, whether through price, distribution, product design, or all three. What they have in common is that sustainability does not sit in a premium tier above the standard offer. It is the standard offer.

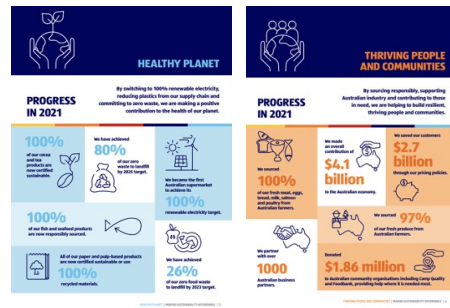
Brands that help bring this principle to life

Aldi removes the single biggest barrier to sustainable consumption: price. Every sustainability decision the retailer makes is designed so that the customer never has to choose between doing the right thing and spending less. In Australia, around 90% of products on Aldi shelves come from their own labels, which gives the retailer direct control over ingredient standards, sourcing and packaging. And by stocking roughly 2,000 products compared to over 10,000 at a traditional grocer, the model itself reduces waste.

But it is the pattern of decisions that makes Aldi stand out. Aldi has never offered single-use plastic carrier bags in Australia. It was the [first Australian supermarket to achieve 100% renewable electricity](#), reaching that target six months ahead of schedule in July 2021. It was the first large Australian supermarket to remove single-use plastic tableware. The first to replace plastic cotton buds with paper. The first to start removing plastic straws from drinks cartons. The first to implement a [battery recycling programme for customers](#). The first to remove artificial colouring and added MSG from its food products. The first to introduce front-of-pack Percentage Daily Intake labelling. It has never sold tobacco. [Ten “Australian Firsts” in total](#). All at the lowest price in the market.

Each of these is a small decision. But together, they add up to a pattern: sustainability is the default, not the upgrade. There is no “green aisle.” There is no organic premium tier that sits apart from the main range. Sustainability is what the whole shop does.

Aldi was named [Australia’s Green Supermarket of the Year in 2023](#) by the Finder Green Awards. It was named [Australia’s Most Trusted Supermarket Brand in 2025](#) by Roy Morgan. And customer visits were up [5.2% year-on-year](#). As Daniel Baker, Aldi Australia’s Sustainability Director, put it: “Every customer that walks through our doors can rest assured that doing the right thing for the planet and saving money at the till, aren’t mutually exclusive.”



Alpro removes a different barrier: the effort of finding the sustainable choice and fitting it into everyday life. Founded in Belgium in 1980, Alpro spent its first decades in the health food aisle. The [acquisition by Danone in 2017](#) changed the equation. Danone brought retail relationships, R&D and marketing investment, while Alpro retained its [B Corp certification](#) and category-first mindset. The brand is now available in over 25 countries, stocked in every major European supermarket chain, and present in coffee shops and away-from-home channels.

The range covers over 40 products across plant-based milks, yoghurt alternatives, desserts, cooking creams, protein drinks, barista formats and a recently launched [kids' range](#) with 30% less sugar than the category average. Base ingredients span soya, oat, almond, hazelnut and coconut, so the consumer is not being asked to accept a single substitute but to choose from a repertoire as wide as conventional dairy.

In Spain, Alpro commands a [65% share of the plant-based yoghurt market](#). And Alpro addresses the emotional barrier too. Its ["Eat your way to a better planet"](#) campaign opens with people struggling through various sustainability efforts: cycling through rain, wearing six jumpers instead of turning the heating on, hauling solar panels onto the roof. The punchline: there is an easier way to help. Just switch to plant-based. The ad names the tension most people feel about sustainability - that it demands sacrifice, effort, discomfort - and dissolves it. The penalty Alpro removed was not just about price or shelf placement. It was the feeling that doing the right thing has to be hard.

Biossance shows how this principle works at the premium end. Squalane is one of the most effective moisturising ingredients in skincare, a lipid that mirrors human skin's own natural oils. For decades, the beauty industry's primary source was shark liver oil. Biossance developed a fermentation process to produce molecularly identical [squalane from renewable sugarcane](#), removing the need for shark-derived ingredients entirely.

Every Biossance formula is built on sugarcane-derived squalane as its foundation, and the naming convention makes that visible: every product starts with "Squalane +" followed by the active ingredients, so the consumer knows exactly what they are buying before reading the back of the pack. The brand sits on <https://www.sephora.com/brand/biossance> carrying the retailer's "Clean + Planet Aware" certification, with prices ranging from \$30 for the entry-level Squalane + Amino Aloe Gentle Cleanser to \$74 for the best-selling <https://www.sephora.com/product/squalane-vitamin-c-rose-oil-P416563>, which has over 200,000 "loves" on the platform. The packaging uses [sugarcane plastic and paper](#). This is premium skincare, but there is no sustainability surcharge. Biossance replaced the industry's unsustainable default with a better ingredient, made that the reason to buy, and priced it where the category already sits. The penalty was never introduced in the first place.



Biossance
Growth Factor Firming Anti-Aging Moisturizer
with Peptides, Collagen + Squalane
★★★★★ 4.6 (280 reviews)
\$64.00





Hear from Česká spořitelna

Petra Ondrušová, Chief Sustainability Officer, and Jana Kuncová, Sustainability Expert at Česká spořitelna, shared their perspective with us directly. Their framing captures what Principle 07 looks like inside a bank.

“The real turning point comes when a bank recognizes that its greatest impact is achieved when sustainability becomes part of the issues clients deal with every day: financing, investing, or making decisions about their homes.” At Česká spořitelna, that means sustainability is not a separate topic. It is directly linked to clients’ financial well-being.

The concrete examples show how this works. Their tools help clients calculate the return on investment for solar panels or energy-efficiency improvements. “Clients can clearly see how much they can save on energy costs, how quickly their investment will pay off, and how to finance it. This is the moment when sustainability stops being an abstract concept and becomes a concrete decision with clear benefits.” Sustainable house financing and responsible investments are not offered as “special ESG products” but are integrated into the mainstream offering. That distinction matters. It is the difference between creating a sustainable product line and making the entire product line more sustainable.

On what makes these initiatives work, they were specific. The most impactful initiatives meet three criteria: “They are easy to understand - clients clearly recognize the benefit they provide. They have a direct impact - they help clients save money, simplify processes, or improve their quality of life. They do not require a compromise - sustainability is not an additional feature or trade-off, but simply a better solution.”

Petra Ondrušová
Chief Sustainability Officer at
Česká spořitelna



Jana Kuncová
Sustainability Expert at
Česká spořitelna



And their biggest learning reinforced the principle: “If clients do not have personal experience with a product or service, it is very difficult for them to develop a strong connection to the topic. People often base their perceptions on what they experience firsthand rather than on what they read.” And: “For most people, ESG is an abstract and complex acronym. In contrast, a clearly explained sustainable product or service with tangible benefits resonates immediately and is much easier for clients to understand and embrace.”



Hear from dm

dm, the Czech personal care retailer, echoed the same logic. As spokesperson Jiří Peroutka put it: “Our ambition is to offer more sustainable alternatives so that they can become a natural choice for the widest possible group of customers. The positive perception of dm in the area of sustainability pleases us and confirms that our long-term, systematic approach focused on accessibility and customers’ freedom of choice brings real benefits to each of our lives.”

07 No penalty for the right choice.

What brands should take from this

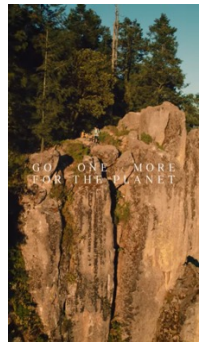
The penalty takes different forms depending on the category. In grocery, it is price. In plant-based, it is availability and range. In premium, it is the assumption that sustainable means more expensive. That assumption runs far beyond beauty. Across categories, brands have treated sustainability as a justification for trading up, creating premium tiers, limited editions and “conscious collections” that sit above the core range. The effect is to turn responsible consumption into a luxury. The brands in this principle did the opposite. Aldi made sustainability the default at the lowest price in the market. Alpro removed the effort through distribution, range and by naming the tension in its advertising. Biossance replaced the industry’s unsustainable default ingredient with a better one and priced it where the category already sits. The question is not whether your brand can afford to remove the penalty. It is whether you can afford to keep charging for it.

08 The participant is the proof.

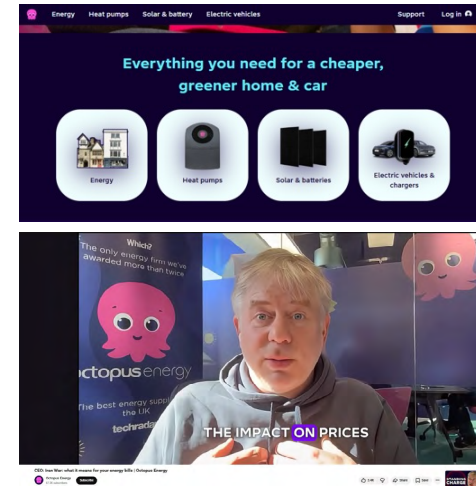
Sustainability becomes more powerful when consumers can play a role in it directly. Most brands communicate sustainability to people. The brands that lead in this ranking find ways to involve people in it. When consumers participate, they do not need to be told the brand is doing something meaningful. They know, because they were part of it.

Brands that help bring this principle to life

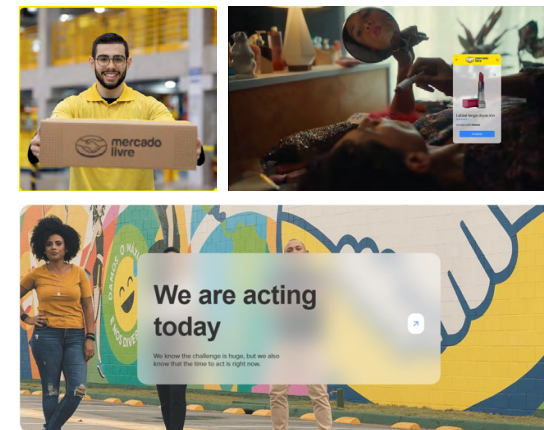
Adidas has built participation into the way it activates sustainability, using sport itself as the mechanism. The [Parley for the Oceans](#) partnership, launched at the United Nations in 2015, turned intercepted ocean plastic into performance footwear. By the end of 2020, [over 30 million pairs of shoes had been made with Parley Ocean Plastic](#). The consumer proof point was concrete: every pair you wore was made from waste that had been pulled from beaches and coastal communities before it reached the ocean. But Adidas did not stop at the product. It invited people to move. What started as Run for the Oceans evolved into [Move for the Planet](#), a global initiative where every ten minutes of physical activity logged on the Adidas Running app triggers a €1 donation to climate resilience projects, in partnership with Common Goal and UN Climate Change. In its first year, 2023, over a million people took part. By its third edition in 2025, over 400 million minutes of movement had been logged since the initiative began, funding sustainability education for over 8,000 individuals and improving sporting facilities for over 23,000 people across participating projects. Meanwhile, Adidas continued to push material innovation: the [Stan Smith Mylo](#), unveiled in 2021, was the first shoe to use mycelium, a leather alternative grown from the underground roots of mushrooms in less than two weeks. The pattern across all of this is consistent: Adidas does not ask consumers to care more. It gives them something to do.



Octopus Energy takes this further: the customer is not just participating in the sustainability story. The customer is the energy system. Founded in the UK in 2016, Octopus has grown to over [8 million UK customers](#), making it the country's largest household energy supplier. But what makes it relevant to this principle is how it has structured its entire offer around active consumer participation. Customers with solar panels sell excess energy back to the grid through [Outgoing Octopus](#), earning money for every kilowatt-hour they export. Those who generate more than they need can donate the value of their surplus solar to fuel poverty charities through [Solar Sharing](#). 800,000 customers signed up in a single month for a tariff offering cheaper electricity on windy days, shifting their consumption to match renewable supply. The [Octopus website](#) now offers a structured pathway from energy supply to solar panels, heat pumps, batteries and EV chargers, turning the household into a node in the grid rather than a passive endpoint. And the CEO, Greg Jackson, records regular [energy updates](#) explaining why green energy is actually cheaper, making the economics of the transition transparent and accessible in a way that no other energy supplier does. In 2025 alone, Octopus made 744,000 installations of smart meters, heat pumps, solar panels and batteries in UK homes. The company was named a Which? Recommended Provider for [nine consecutive years](#). Octopus does not sell green energy as a premium product. It has made participation in the energy transition the product itself.



Mercado Libre shows what participation looks like when the entire business model is built on it. In Brazil, Mexico and Argentina alone, more than [9.5 million small and medium-sized enterprises and entrepreneurs](#) were operating on the brand's ecosystem in 2025. More than half of those sellers have their Mercado Libre sales as their primary source of revenue. They generated over 150,000 jobs directly linked to their activity on the marketplace. The [brand film](#) shows what this looks like in practice: products fitting into people's real moments of life, across a wide range of communities and contexts. In 2025, the company delivered 218 million packages with reduced emissions, supported by a fleet of 17,500 low-emission vehicles. Mercado Libre's sustainability is not a programme that runs alongside the business. It is the economic participation of millions of people who would otherwise be excluded from the digital economy. Every seller, every first loan, every package delivered to a previously unreachable address is the sustainability outcome.



And as the effects of climate change intensify across Latin America, that same infrastructure becomes a [humanitarian response system](#). Mercado Libre has a structured emergency protocol that activates when disaster strikes, turning its logistics network, warehouses and fintech platform into channels for aid. The participation model that powers everyday commerce is the same one that mobilises when communities are in crisis.

08 The participant is the proof.

What brands should take from this

Ask what people do differently because of you, not what you say about sustainability. Adidas gave people a reason to move and turned that movement into climate funding. Octopus gave customers the tools to generate, store, sell and share energy, making every household an active participant in the grid. Mercado Libre built an entire ecosystem where millions of people's livelihoods are the social impact. The common thread is that participation creates belief far faster than communication ever will. If consumers can only observe your sustainability story but never take part in it, the story will always feel like it belongs to the brand, not to them.

09 Inclusion is who you serve, not just who you cast.

Real inclusion shows up in what a brand sells, not just in who appears in the advertising. The brands people trust on inclusion do not cast diversely and call it done. They redesign the product, the service or the experience so that more people can actually use it. A different kind of commitment and consumers can tell the difference.

In categories where inclusion is treated as a communications choice, it can feel performative. The brand features more diverse faces in the campaign, but the product itself has not changed. In categories where inclusion is treated as a design choice, it becomes structural. The product works for people it did not work for before. Harder to do, but also harder to dismiss. The brands that score highest on this principle treated inclusion as an engineering problem, not a casting decision.

Brands that help bring this principle to life

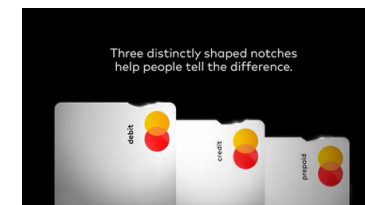
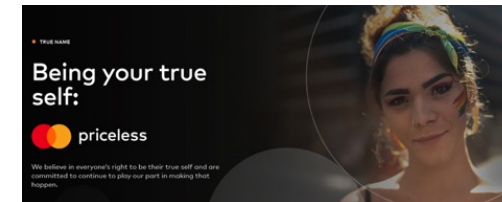
Mastercard is the clearest expression of this principle, because the card itself changed. Not once but twice, for two different communities that the existing design was failing.

[True Name](#), launched in 2019 in partnership with GLAAD, allows transgender and nonbinary people to put their chosen name on the front of their card without requiring a legal name change. The context matters: research at the time showed that 32% of people who had shown an ID with a name or gender that did not match their presentation had been verbally harassed, denied service, asked to leave, or assaulted. For millions of people, the card in their wallet was a daily source of friction and, in some cases, danger. True Name addressed that by changing the product, not the advertising. The feature is now available through partners including Citi, BMO and T-Mobile MONEY, and Mastercard has advocated for it to become an industry-wide standard.

Then came [Touch Card](#), introduced in 2021 for blind and partially sighted people. As more cards moved to flat, unembossed designs, there was no reliable way for visually impaired users to distinguish between their credit, debit and prepaid cards by feel. Mastercard addressed this with a system of notches cut into the short side of the card: a round notch for debit, a square notch for credit, a triangular notch for prepaid. The design was co-created with IDEMIA and endorsed by the RNIB in the UK and VISIONS in the US. The standard was built to work with existing terminals and ATMs so it could be deployed at scale, not offered as a special request.

Another example is [Kids4Tech](#) (expanded from the original Girls4Tech programme launched in 2014). The curriculum is built directly from Mastercard's own technology: cryptography, fraud detection, data science, AI. As of 2025, 12 million students had been reached across 68 countries, with over 8,500 Mastercard employees serving as mentors. Euromonitor recognised it as the world's largest corporate STEM programme designed for students aged 8 to 16.

These are only a few examples. The logic behind them is not accidental.



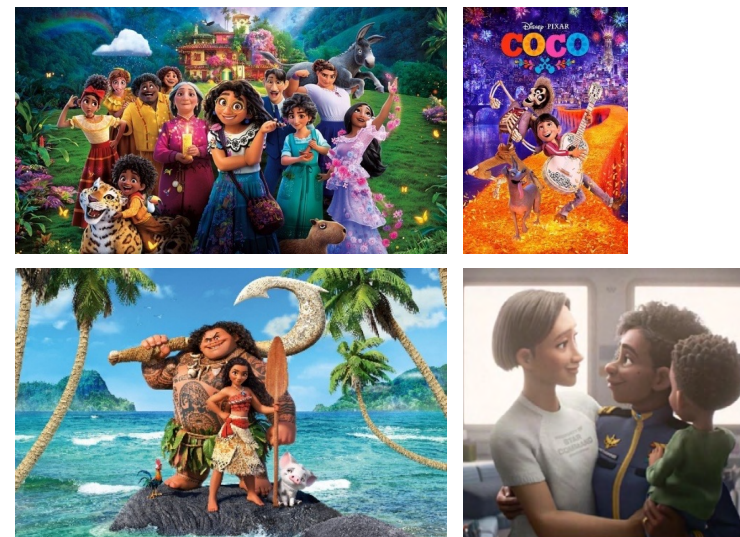
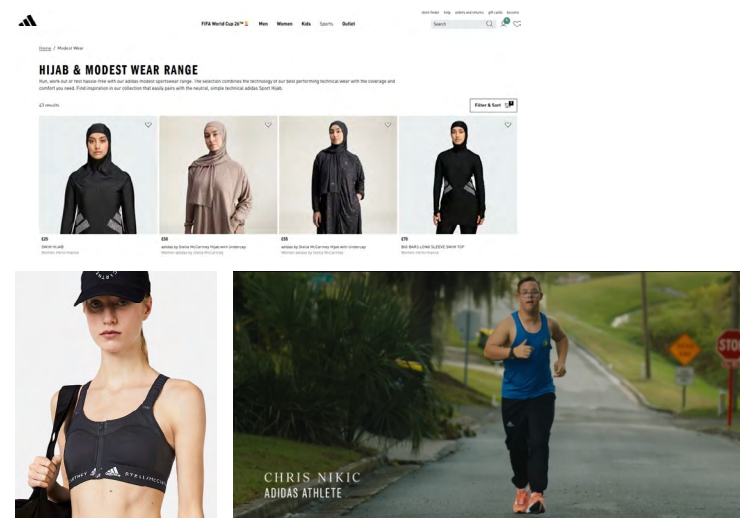
Adidas brings this principle to life through the physical product. The brand has systematically redesigned what it makes so that people who were previously excluded from sport can participate fully. The [adidas Sport Hijab](#) was one of the first performance hijabs from a major sportswear brand. It sits alongside a full modest sportswear range that includes swim hijabs, full-length leggings and long-sleeve tops, treating modest wear not as an afterthought or a capsule collection but as a permanent part of the product architecture.

The [adidas adaptive collection](#) takes the same logic further. [Designed for and with athletes with disabilities](#), the range includes footwear with easy-entry systems, reduced seams and soft threading for minimal skin irritation in wheelchair use, and apparel engineered for seated athletes. The Supernova Rise 3 Adaptive running shoe, for example, is designed for runners with prosthetic legs and other mobility needs. And the [brand's post-mastectomy sports bras](#), developed with breast cancer survivors, provide support and comfort for women returning to sport after surgery. You can also watch here on Adidas Youtube page [how women's products are made differently](#). In each case, inclusion is not a story told in the campaign. It is a specification written into the product brief.

Disney shows how this principle works when the product is a story. Disney's core job is intergenerational storytelling, and the shift over the past decade has been to make that storytelling reflect a much broader range of identities, family structures and lived experiences. [Encanto](#) centres a Colombian family navigating expectations and belonging. [Coco](#) explores memory, loss and intergenerational connection through Mexican cultural traditions. [Moana](#) and its sequel centre Pacific Islander culture, leadership and identity. In each case, the story is not "about" diversity. It is a story that could only exist because the characters, the setting and the cultural context are specific.

[Pixar's Lightyear](#) went further. The character Alisha Hawthorne is shown in a same-sex relationship with her wife, their engagement, marriage, the birth of their child, and a kiss at their 40th anniversary woven into the emotional spine of the film. When 14 countries banned it, Disney refused to cut the scene. That is a product decision with commercial consequences, not a social media statement.

Disney's [inclusion commitment](#) extends into how it works, not just what it produces. The company's Creative Talent Development and Inclusion team connects writers, directors and crew at all levels to opportunities across its scripted and unscripted slate, building the pipeline behind the camera as well as in front of it. Disney's product is its stories, and the commitment to inclusion has to live in who those stories are about, who makes them, and how honestly the catalogue is treated.





Hear from Mastercard

Shamina Singh, President of the Mastercard Center for Inclusive Growth and EVP Sustainability, shared her perspective with us directly. Her framing explains why inclusion at Mastercard lives in the product, not just the campaign.

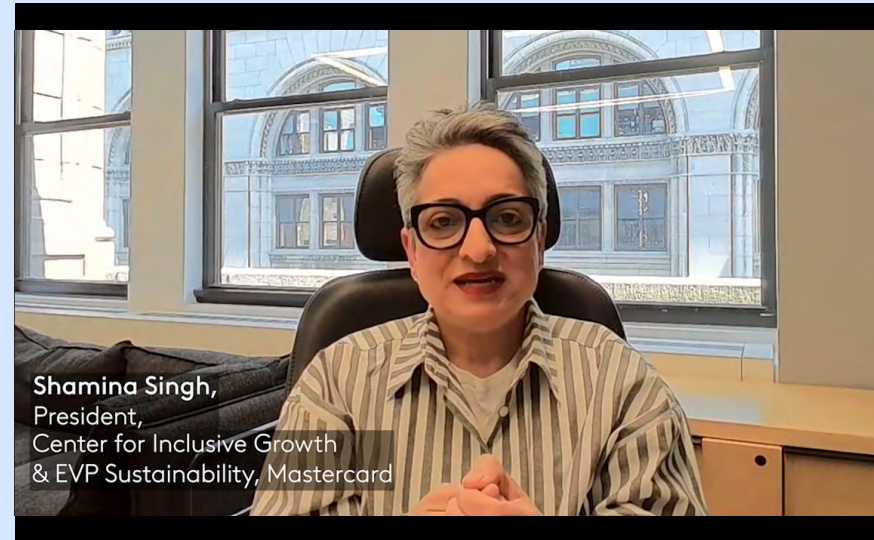
“Our approach is to leverage technology, our people, our capital, our programs, our policies, really in service of people and planet, and rooted in the business.” That philosophy is what turns inclusion from a campaign theme into a product specification. The commitment started over 15 years ago as a financial inclusion goal, initially bringing a billion people into the formal financial system and 60 million small businesses by 2025. Mastercard surpassed that target. The newer commitment, to connect and protect 500 million people and small business owners on their journey to financial health, extends the same logic into a digital and AI-driven economy.

As Shamina put it: “Our business strategy depends on our ability to operate and impact the world in a positive way, and our ability to operate and impact in the positive way affects our business strategy.” It is not a purpose statement bolted on. It is the business model. And her advice to other brands reinforced the principle: “Align your business strategy with your impact strategy, recognizing that those two things rely on each other.” And: “Stay away from sort of generic commitments.”

“The more people that can participate, the better it is for the world.” Shamina called it the North Star.

True Name, Touch Card, Strive, Kids4Tech: each one is a product or programme decision, not a campaign. That is the difference between casting diversely and serving inclusively.

[▶ Watch the interview here](#)



09 Inclusion is who you serve, not just who you cast.

What brands should take from this

The test is straightforward: would your inclusion commitment survive a product brief, not just a comms brief? If the most visible expression of inclusion at your brand is the casting in the latest campaign, the commitment is still sitting at the surface. The brands in this principle have each pointed to something they redesigned: a card, a shoe, a hijab, a sports bra, a story. The difference between representing people and actually serving them. Start with one product decision that changes who can use what you make. Trust in inclusion begins there.

ACT 4: RESONANCE

How sustainability travels further

Up to this point, the principles have focused on what a brand does and how people experience it. This final act looks at how sustainability reaches people who are not already paying attention.

The brands that perform well here do not rely on a single global sustainability message repeated everywhere. They use creativity to make their story vivid, they let other voices carry it into spaces the brand cannot reach on its own, and they adapt it to what matters locally. That is how sustainability gains cultural relevance, not just corporate credibility.

10. Let creativity carry the conviction.

The strongest sustainability ideas are not always the most heavily explained. A well-chosen creative idea can do the work of making the sustainable choice feel vivid and easy to grasp.

11. Creators help the message travel.

Brands extend their reach when creators bring sustainability into the moments and communities where people already engage. The value is not in replacing the brand voice but in helping the message land in ways that feel more immediate and social.

12. Sustainability speaks with an accent.

What matters most shifts from one market to another. The brands that lead do not assume one sustainability story works everywhere. They listen for local priorities and respond in ways that feel grounded in context.



10 Let creativity carry the conviction.

Whether a brand whispers or shouts, the creative should be the proof, not the explanation. Sustainability communications have a specific problem: the territory feels serious, complex and easy to overexplain. The brands that cut through did not try to explain their sustainability position through their creative. They let the creative embody it.

The mechanism is the same whether the brand chooses volume or restraint. Irreverence works when it is irreverent about the right thing, and from a brand that is certain about its argument. Silence works when the position makes silence the most honest creative choice available. And cultural spectacle works when the brand is confident enough to let someone else carry the story. The tell is always the same: when the creative could have been made by any other brand in the category, the position is not owned deeply enough.

Brands that help bring this principle to life

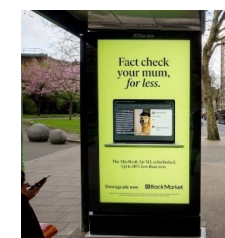
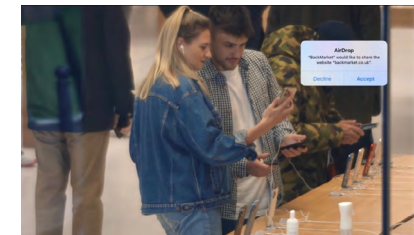
Back Market is the clearest expression of this principle because every campaign is the argument, performed rather than explained. The brand found early on that wordy messages about saved carbon did not land with everyone. What worked was making the sustainable choice look desirable, not dutiful. The creative does the convincing when the copy cannot.

It started with [Hack Market](#). On Earth Day 2022, Back Market used Apple's own AirDrop technology to broadcast messages onto display iPhones, iPads and MacBooks inside Apple Stores in Paris, Berlin and London, redirecting customers to refurbished alternatives. The circular economy argument was not described. It was demonstrated on a competitor's territory. The campaign generated over 100 million impressions in its first week, 90 articles across online and offline media, and an 80% increase in intent to purchase refurbished. It won five Clío Gold Awards, a D&AD Yellow Pencil, and a Cannes Creative Strategy Lions Silver.

Then came [Let's End Fast Tech](#) (Earth Day 2025), which hijacked the iconic "Shot on iPhone" campaign. The visuals used before-and-after imagery to show how much the environment had changed between smartphone generations: glaciers vanished, droughts reshaped landscapes, floods swallowed cities. Same format, same aesthetic, entirely different argument. The campaign appeared in high-profile locations in New York, London, Paris, Madrid and Hamburg.

And most recently, [Downgrade Now](#) (April 2026): a campaign positioned as the cultural antidote to AI-driven sameness and upgrade fatigue. OOH executions across London and Birmingham parody everything from nonsensical AI outputs to impenetrable tech jargon. An iPhone showcases an AI-generated muscular frog with the line "Scroll past the slop, for less." An iPad and Apple Pencil champion hand-drawn illustration: "Do hand stuff." A PlayStation 5 declares: "Your boss can't ping you here." As Daniel Brill, Back Market's Executive Creative Director, put it: "What if the tech you and the planet actually need is tech that already exists?"

Each campaign builds on the last. Each one could only be Back Market. The creative and the conviction are structurally inseparable. Kantar recognised this with its Consumer-led Creative Effectiveness award, confirming that creative daring and sustainability credibility can reinforce each other commercially.



ACT 4 RESONANCE

Veja is the opposite end of the same spectrum. The brand spends [nothing on advertising](#). Zero. The money that would go into campaigns is redirected into the supply chain: fair-trade organic cotton from Brazil and Peru, wild Amazonian rubber purchased at four to five times market price, and production in factories committed to fair wages. The silence is the creative. The absence of a campaign is the sustainability argument made economically visible.

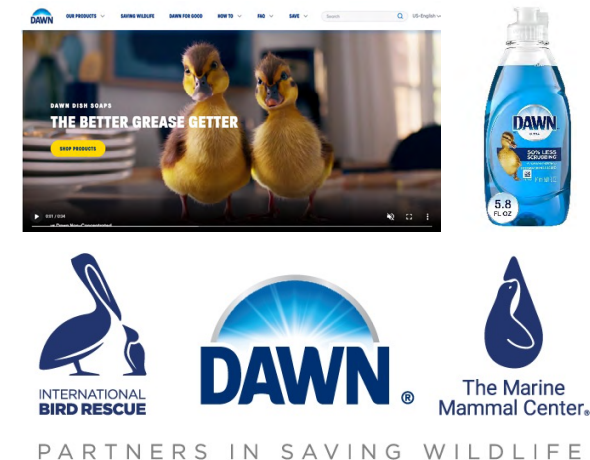
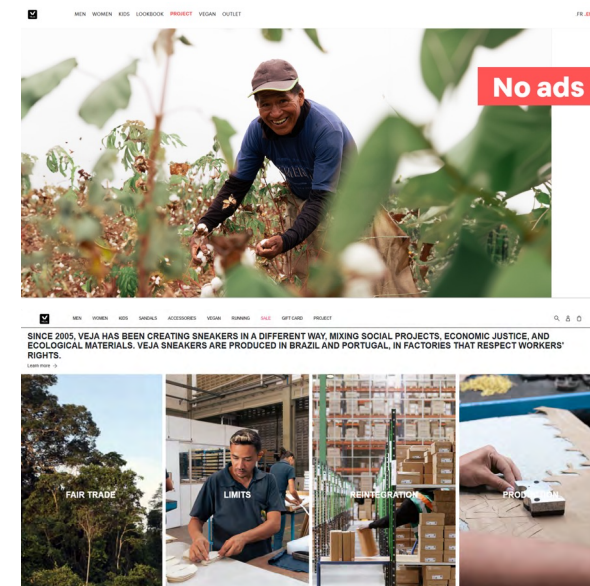
When Veja does produce content, it points the camera not at the product but at the people who make it. [THE VEJA STORY](#) is 20 years of the brand told through the supply chain: rubber tappers in the Amazon, cotton farmers, factory workers, and the places that connect them. It is not a brand film. It is a documentary about what the brand actually does. And in June 2026, Veja premiered [Far From the Spotlight](#), a 30-minute documentary by Jérémie Battaglia co-produced with La Blogothèque, profiling four people across the supply chain: a rubber tapper, a cotton farmer, a waste-picker cooperative leader, and a factory foreman. As co-founder Sébastien Kopp put it: "Even if people don't care, we care. We care about how much an organic cotton producer makes every month."

On its [transparency page](#), Veja openly shares its costs, its chemical testing, its B Corp certification, and even the problems it has not solved yet. The product, with its minimalist V logo legible from across the street and its Amazonian wild-rubber sole, carries the signal for the wearer before a word is read. Launched in 2005, [the brand surpassed €200 million in revenue in 2023](#) and sold over four million pairs globally in 2024, all through self-financing and organic growth. Proof that creative restraint is not a commercial compromise, it is a creative position.

Dawn (USA) has one image, sustained for nearly 50 years. In 1978, experts at [International Bird Rescue](#) discovered that Dawn dishwashing soap was the most effective and gentle product for removing crude oil from bird feathers. It was not a sponsorship. It was a finding. Rescue workers had no prior relationship with the brand; they tested multiple alternatives and Dawn won on performance.

Since then, the duckling being washed in blue soap has become the brand's defining image, not through a campaign, but through news footage of real rescues. The numbers on [Dawn's own wildlife page](#) tell the story: over 200 rescue missions using Dawn, more than 50,000 bottles donated, and over 150,000 birds and marine mammals cleaned. You can [watch rescue workers demonstrate the process](#) in the Dawn Helps Save Wildlife series, and the duckling now appears on [every bottle on the shelf](#).

Dawn did not describe its effectiveness. It demonstrated it, on camera, in real conditions, in the worst circumstances imaginable. The association between "tough on grease, gentle on wildlife" is now so deeply embedded that no competitor could replicate it. The product is the creative.



Back Market

Hear from Back Market

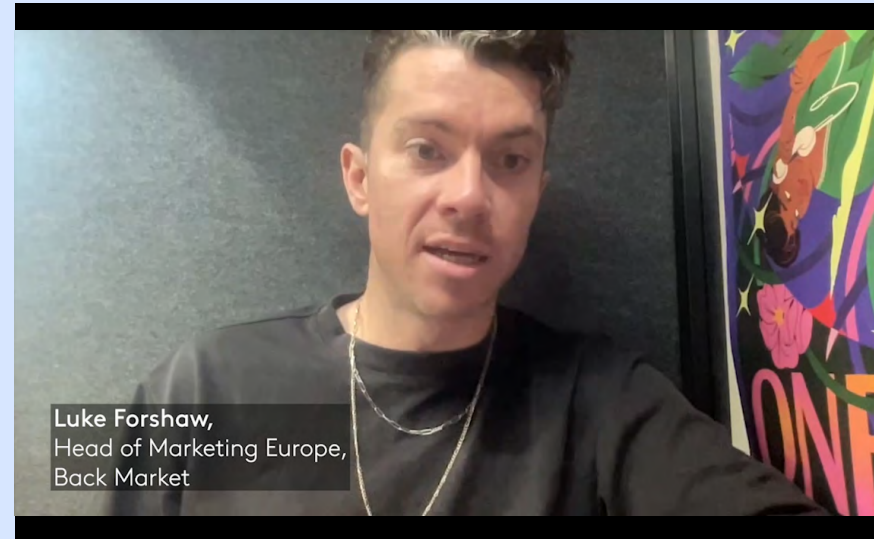
Luke Forshaw, Head of Marketing Europe at Back Market, shared his perspective with us directly. His framing explains why every campaign sharpens the position rather than diluting it.

"It's not always been super plain sailing. We've had messages before which have maybe been too wordy, or they've talked about things that are difficult for people to relate to, like saved carbon, which we know is a good thing, but what does that mean? How much is a good amount? And what we found is actually it's the visual stim." That learning is what turned Back Market's creative from explanation into demonstration.

On what makes sustainability messaging land, Luke was direct: "We only ever talk about things that we believe we've got a right to talk about. The public are becoming far more attuned to greenwashing and that's not anything we would do. It's tacky, it's hollow." The test, he explained, is always two questions: "Do we have a right to be talking about these things? And two, is it relatable for the public?" When both answers are yes, the creative can be bold without being preachy. "It really resonates with people when you don't patronise, you don't lecture, you don't overcomplicate."

And his advice to other brands reinforced the principle: "Sustainability should be fundamental to your company in any way, shape or form. Ensure that it's credible, it's relevant, it's real with what you're saying, but don't have it so it's a buzzword that might appear in your TV spotlight. Are you actually implementing change that's doing good from a company level?"

[▶ Watch the interview here](#)



10 Let creativity carry the conviction.

What brands should take from this

Before briefing creative, ask two questions. First: does the work demonstrate the sustainability position or describe it? Demonstration builds trust faster than explanation. Back Market did not talk about e-waste. It hijacked Apple Stores. Dawn did not claim gentleness. It washed oil off ducklings on live television. Second: is the work so specific to this brand's position that no other brand in the category could have made it? If a competitor could run the same campaign and it would still make sense, the creative is not yet doing its job. And if the instinct is to add more words, more data, more justification, consider Veja: a brand that redirected its entire advertising budget into the supply chain and let the silence speak. The goal is not louder sustainability communications. It is creative so rooted in the brand's conviction that it becomes inseparable from it.

11 Creators help the message travel.

Sustainability can feel abstract, technical, or preachy when it comes from a brand. The brands that overcome this do not amplify their own voice louder. They let someone else carry it. The creator must already believe the value for the partnership to work. Endorsement alone will not make the message travel but translation does.

The difference is in who initiates the belief. When a brand pays someone to repeat a message, consumers can feel the transaction. When a brand finds someone who already lives the value, the message arrives differently. It feels discovered, not placed. It lands in a context the brand could never access on its own: a personal feed, a cultural moment, a community conversation. The brands that stand out on this principle have understood that the most powerful sustainability communication is often not what the brand says. It is what someone else says because they already believe it.

Brands that help bring this principle to life

Dove has spent 21 years building the case that real beauty matters. Its own campaigns have done extraordinary work in shifting culture, from the original Real Beauty billboards in 2004 to the Self-Esteem Project reaching over 100 million young lives. But the moment that defines Principle 11 is a TikTok.

In 2024, to mark 20 years of Real Beauty, Dove launched [The Code](#): a short film about how AI is generating a new wave of unrealistic beauty standards, and a pledge to never use AI to create or distort women's images. The campaign extended across 30 countries, generated over 500 million organic views globally, and won the Cannes Lions Media Grand Prix. But the moments that gave the campaign its emotional centre were not the film. They were the creators who carried the message in their own voice. [Taryn Delanie](#), shown an AI-generated version of herself, paused and said: "She's gorgeous. But it's not me." [Drew Barrymore](#) shared a personal reflection on ageing, self-expression, and the pressure young girls face from AI-filtered beauty content. [Reba McEntire](#) spoke about confidence and growing older with grace. And [Samyra](#), with her 2.3 million followers, challenged her audience directly: did they know that 90% of their feeds could soon be AI-generated? Each of them already believed in the value Dove was expressing. None of them needed a script. That is why it worked: the message travelled because the conviction was already there before the partnership began.



ACT 4 RESONANCE

Mercedes-Benz x Lewis Hamilton is a different expression of the same principle. Hamilton’s veganism and environmental advocacy were not created by the partnership. They predated it. He [publicly stated he wanted to push Mercedes to eliminate animal leather from its cars](#), and the company listened. In September 2025, Mercedes-Benz became the [first car manufacturer in the world to offer a fully vegan-certified interior](#), with every soft-touch surface in the new GLC independently certified by The Vegan Society. Around 100 supplier materials were audited and redesigned where necessary. Hamilton did not endorse a product decision. He helped drive it. The creator’s conviction changed the product, not just the campaign. That is what separates a creator relationship from a sponsorship.

Magalu x Lu (Brazil) takes this principle into entirely new territory. Lu do Magalu is a virtual influencer, created in 2003 as a simple e-commerce assistant for Brazilian retailer Magazine Luiza. She now has over [32 million followers across platforms](#), making her the most followed virtual influencer in the world. What makes Lu relevant to this principle is not her scale but her range. She has promoted women’s rights, LGBTQIA+ causes and racial equality. During Pride Month 2021, she [handed her entire TikTok over to LGBTQIA+ creators](#) under the hashtag #LivreParaSer (Free to Be), turning her platform into theirs. She starred in a [music video with DJ Alok](#), appeared on the cover of Vogue Brazil, and became the first virtual character to be a Red Bull official caricature. In 2023, Ogilvy Brasil won a One Show Bronze Pencil for the work that accelerated Lu from virtual assistant to activist, model and cultural icon. Lu is not a spokesperson for Magalu’s sustainability agenda. She is the channel through which Magalu enters cultural conversations it could not access as a retail brand.

Dettol #HandWashChallenge is the scale version of this principle. In March 2020, as the pandemic spread, Dettol partnered with TikTok to [launch a hashtag challenge that turned handwashing into a dance](#). The brand created a bespoke song, a branded filter, and launched with 17 creators across India, including [Riyaz Aly \(31.9 million followers\)](#), [Avneet Kaur](#), and [Nisha Guragain](#). Within four days, the challenge had 8.7 billion views. It then expanded to nine additional markets across Asia and North Africa, ultimately generating [over 100 billion views](#) and [75 million videos created](#). Dettol did not explain why hand hygiene matters. Creators translated a public health imperative into a social media behaviour. The message travelled because the format was native to the platform and the creators were native to the audience.

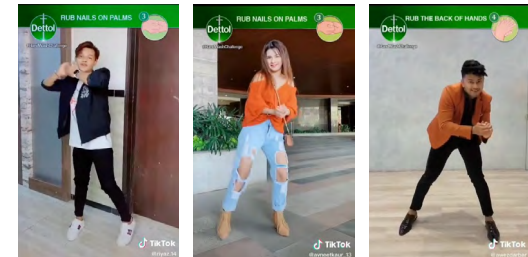


magazineluiza

Lu do Magalu

3,991 posts 9.2M followers 65 following

Influenciadora Virtual #magalu
 Criadora de conteúdo
 Compre comigo pelo WhatsApp
 wa.link/wceolq and 3 more
 @magazineluiza





Hear from Magalu

Aline Izo, Head of Brand at Magalu, shared her perspective with us directly. Her framing explains why Lu is not a marketing channel but a values translator.

“Lu’s role is to translate complex corporate agendas into daily language. If Magalu says it supports the fight against violence against women, Lu acts supporting women.” That single sentence is Principle 11 in action. Lu does not repeat Magalu’s sustainability messaging, she performs it. She carries it into cultural spaces, social feeds and conversations where corporate language would never land.

And the commitment runs deep. Today, the Magalu Women’s Channel allows any customer to report domestic violence or access psychological support directly through the Magalu app. The Magalu Fund supports 38 NGOs working to combat violence against women. Lu became the public face of all of it, not because she was briefed to, but because the brand’s culture made it inevitable.

The numbers behind the culture are real too. From Magalu’s 2024 Annual Sustainability Report: 41.91% women in management positions and above. 39.05% Black people in coordination positions and above. 600+ employees in affinity groups meeting weekly. The Move+ Programme explicitly preparing women and Black employees for leadership, with more than half of the 48 graduates recognised for promotion. In a country where racial inequality is structural and pervasive, a major retailer publishing these numbers through named, audited programmes creates a form of social sustainability trust that no campaign could replicate. Lu carries those numbers into culture. She does not explain them. She embodies them.

[▶ Watch the interview here](#)



11 Creators help the message travel.

What brands should take from this

Two filters before any partnership. First: does the creator already believe the value? If the sustainability message needs to be briefed in, it is an endorsement, not a translation. Taryn Delanie did not need a script to react to her AI-generated face. Hamilton did not need a brand brief to advocate for leather-free interiors. Lu did not need a campaign to champion inclusion. The conviction was already there. Second: can the creator express it in a way that feels real and relevant to their audience? The format matters as much as the person. A TikTok reaction, a dance challenge, a virtual influencer's Instagram post, a seven-time world champion's phone call to the CEO: each one is a format the brand could not have created on its own. The best sustainability creator partnerships do not extend the brand's voice. They create a new register for it.

12 Sustainability speaks with an accent.

What sustainability means changes by market, by culture and importantly by what people need most, right now, in their lives. The brands that rank highest locally are not always the ones with the biggest environmental claims. They are the ones solving what matters most to people in that place, in that context. The framework travels but the answers do not.

This is perhaps the most important insight in the entire ranking. Because the temptation for global brands is to write a single sustainability brief and deploy it everywhere. The data says that will not work. Sustainability is filtered through local anxieties, local histories and local definitions of progress. The brands that win trust locally are the ones that learned the local accent before they spoke.

How this shows up across markets

FRANCE

SO'BiO étic. Biocoop. Terres d'Aventure. C'est qui le Patron?!. L'Arbre Vert.

Every brand in the French Top 5 is French-origin, and every one is cooperative, organic-certified, or citizen-led. There is not a single global corporation in sight.

In France, sustainability means democratic governance and local provenance. It means knowing who made your food, how they were paid, and having a voice in the process. [C'est qui le Patron?!](#) literally translates to "Who is the boss?" and the answer is: the consumer. Since 2016, over 15.3 million people have bought its products, over 41,000 vote on the specifications and fair price for each new product, and more than 17,500 have become cooperative members at one euro per share. The result is printed on the packaging: "This milk pays its producer a fair price." The brand's milk became the best-selling in France (excluding private labels and promotions), without a single television advertisement. In 2025, founder Nicolas Chabanne transferred his shares, valued at approximately €30 million, into a foundation, legally preventing any future sale. That is a distinctly French idea. And no global sustainability brief would have predicted this Top 5.

GERMANY

If France is governed by democratic provenance, Germany is governed by ingredient purity. The German Top 5 reads like a manifesto for Reinheitsgebot thinking: the centuries-old principle that what goes into a product should be transparent, minimal and honest.

[Frosta](#) is the clearest expression. In 2003, CEO Felix Ahlers, a trained chef who had studied under a two-star Michelin kitchen in Paris, returned to the family business, was horrified by the additives, and imposed the company's own Reinheitsgebot: zero additives, zero flavour enhancers, zero colourings, zero aromas. Every ingredient traceable to its origin via a code on each pack. As Ahlers put it: "We don't want to mix anything into the food that you would never use at home." The transition was painful. Products became more expensive. Sales dropped by 40%. One in ten jobs was lost. The company survived on personal loans. Frosta held its ground. Twenty years later, the Reinheitsgebot is the brand, and Frosta leads the German frozen meal market. [Alnatura](#) Germany's first organic supermarket (opened in Mannheim in 1987, now 153 stores), has won the Kundenmonitor for customer satisfaction four years running. [Rügenwalder Mühle](#), a 190-year-old sausage maker, spent a decade reformulating plant-based products that taste like the sausage Germany already knows, and became the country's number one plant-based brand. In Germany, sustainability is not a campaign layer. It is an ingredient list.

POLAND

LEGO. Rossmann. LOT Polish Airlines. Orlen. YouTube.

A global toy brand, a retailer, a 96-year-old national airline, an energy company building offshore wind farms, and a tech platform. Nothing like France. Nothing like Germany.

In Poland, the ranking reflects national resilience: energy independence from a single external supplier, affordability in a cost-of-living crisis, and deep institutional trust in brands that have been there through everything. Orlen is an energy

company, and it appears in the Top 5 because when your country's energy security was tied to a supplier whose reliability could not be guaranteed, transitioning to renewable sources is simultaneously an environmental act and a national one.

And then there is YouTube. It may seem surprising in a sustainability ranking, but in Poland it makes sense. YouTube is a door to knowledge, learning, skills and culture. It is free and accessible to anyone with a phone. According to Oxford Economics, YouTube's creative ecosystem contributed €98 million to the Polish economy in 2020 and supported 11,000 full-time equivalent jobs, turning viewers into creators and creators into small businesses. It is not a brand with a sustainability strategy. It is a platform that democratized access to everything, and people trust it for that.

But sustainability also shows up in Poland through practical, daily-life infrastructure. Lidl Polska is a good example. In their words:



"One of the pillars of CSR Lidl Polska strategy is the commitment to preventing waste and using resources responsibly, both within the supply chain and in our own operations. A key objective for us is to move towards a circular economy in waste management.

An important tool supporting this goal has been the rollout of reverse vending machines, enabling customers to return packaging in all Lidl stores in Poland. As early as 2022, our company launched pilot programs for collecting PET plastic bottles, later expanding the system to include cans. We also run an awareness campaign encouraging our customers to actively participate in the new deposit return system, highlighting that returning bottles and cans can be simple, quick, and convenient.

We see that the system not only operates efficiently but has also become a regular part of the shopping experience in our stores. Customers appreciate the convenience and the ability to return both deposit and non-deposit packaging in one place, regardless of where it was purchased.

For several years, we have continued the 'Buy, Don't Waste' initiative, which offers products nearing their expiration date at reduced prices, contributing to food waste reduction. We are also engaged in educational efforts, such as the 'Art of Not Wasting' campaign, to encourage consumers to more responsible food management. In addition, we implement our own internal measures to reduce

food waste. Through the AutoDispo system, which analyzes current stock levels and sales of each individual product in stores, checks availability in warehouses, and overlays this with sales forecasts, we are able to optimize order quantities, reduce food waste, and ultimately protect environmental resources.”

Sustainability as daily infrastructure, not annual report.

BRAZIL

BYD. Neoenergia. Mãe Terra. Magalu. Disney.

An EV manufacturer, an energy company that partnered with Rock in Rio to install solar-powered streetlights and electric carts across the City of Rock, a food brand built on native Amazonian ingredients, a retailer whose virtual influencer Lu has over 32 million followers, and Disney.

The Brazilian ranking tells a story about modernisation, access and national identity all at once. Mãe Terra connects food to the Amazon and to what it means to eat Brazilian. Magalu published audited diversity data, built a trainee programme exclusively for Black candidates that generated national debate, and created the world’s most followed virtual influencer to carry its values. BYD is electrifying Brazilian public transport. Neoenergia is decarbonising not just the grid but the culture, using music festivals to make the energy transition visible and participatory. What connects them is a view of sustainability as progress and inclusion rather than restraint.

JAPAN

Nintendo. ANA. ENEOS. Apple. PayPay.

A games company, an airline, an energy provider, a tech giant and a QR payment app. No Western sustainability framework explains this ranking. But Japanese culture does.

The word is Mottainai. A profound regret over waste, rooted in Buddhist and Shinto beliefs that all objects possess intrinsic value. To discard something before its usefulness has ended is an act of disrespect. In December 2025, Mottainai was officially added to the Oxford English Dictionary. It is why a Game Boy from 1989 still works. Nintendo’s hardware philosophy, built by Gunpei Yokoi around “lateral thinking with withered technology”, uses mature, affordable components to

create products that endure rather than obsolesce. ANA is here because of Omotenashi: selfless hospitality, consistency of care and year after year. ENEOS is here because after Fukushima, energy independence became a national question. Over 90% of Japan’s energy is imported. Hydrogen infrastructure is not an environmental story in Japan. It is a security story. PayPay, with over 70 million users, made financial participation frictionless for the elderly, for rural communities, for small businesses in a deeply cash-dependent society. Taken together, the Japanese Top 5 points to durability, service, energy security and frictionless access as the local definition of sustainability.

And beyond these five markets...

The pattern extends further. In South Africa, sustainability is inseparable from progress, affordability and daily reality. In a country where up to 40% of township residents’ monthly income can go to transport costs just to reach a mall, and where energy infrastructure remains fragile, sustainability is not an environmental narrative layered on top of life. It is life. The brands that resonate are building access, creating earning opportunities and investing in the communities they serve.

In the Czech Republic, the pattern is different again.

Kaufland, one of the country’s largest retailers, frames sustainability as a natural extension of how the business operates: “At Kaufland, we see sustainability as a natural part of our business across the entire company, from our own meat processing plant and logistics to our stores. Our activities have a significant impact on both the environment and society. We are pleased that their continuity and, above all, their impact are positively perceived by the public.” That is not a campaign. It is an operational philosophy, embedded across the value chain and validated by the people who shop there every week.

Each market tells its own story. The framework is the same but the answers are not.



Hear from Takealot

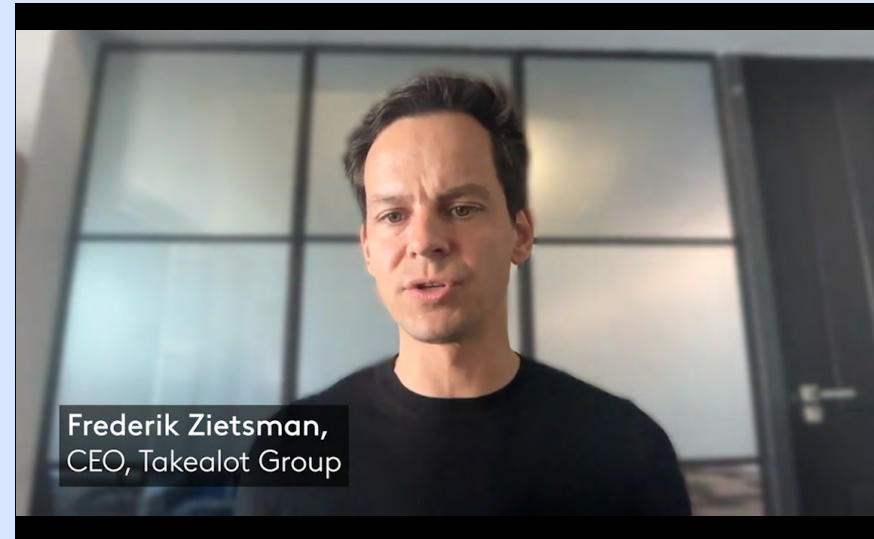
Frederik Zietsman, CEO of the Takealot Group, South Africa's largest e-commerce ecosystem, shared his perspective with us directly. His framing captures what sustainability sounds like when it speaks with a South African accent.

"Our foundational belief is that Takealot Group will only be sustainable if the societies in which it functions is sustainable." That conviction grew from direct experience: letters from people in rural areas thanking the platform for giving them access to earning and opportunity for the first time. "I started to form this picture in my mind that we are actually giving accessibility to people that are excluded for many reasons, not just because of geographical location, but because of skills and because of historic spatial reasons."

The Takealot Township Economy Initiative was born from that realisation. Rather than building extractive models, Takealot invests value-enabling components directly into townships: franchise hubs, personal shoppers, small business manufacturing capability. The personal shopper programme now has more than 18,000 participants. "You don't need a degree, you don't need tertiary education or experience. If you've got a phone, credibility and social capital and a bit of a knack around trying to sell, you can do this."

And Fred was direct about the hierarchy: "Yes, we have the biggest EV fleet in Africa. And yes, 80% of our vehicles are charged by solar from our DCs. But that all sounds a bit fancy and excessive if we have a society that is not built on sustainable principles. If every South African is not included and has ability to earn, then there's no point in having EV trucks."

[▶ Watch the interview here](#)



His advice to other brands reinforced the principle: "Be quite honest with yourself in terms of what do you have to steward. What is unique to your model? Don't be tempted to take the textbook way, because that's not how South Africa works. Think through your problems and look at your solutions in a way that it doesn't solve just the obvious, that it actually benefits society, employees, the country ultimately."

12 Sustainability speaks with an accent.

What brands should take from this

In France, sustainability is governed by the citizen. In Germany, by the ingredient list. In Poland, by national resilience and the infrastructure of daily life. In Brazil, by modernisation and inclusion. In Japan, by durability and a cultural aversion to waste that now has its own entry in the Oxford English Dictionary.

Before entering a market, map the local anxiety hierarchy, not the global one. What are consumers most worried about in their daily lives, in your category, in that place? The answer should directly inform your sustainability position. A single global brief will not do it. Because sustainability speaks with an accent. And the brands that listen to it are the ones people trust.

Summary: 12 actions. One per principle.

The 12 principles describe what the leading brands do. The 12 actions above distil each one into a single provocation. The next section turns them into a working tool you can use with your team.

01

Audit your brand's core job. If sustainability needs a separate page, it's not yet integrated.

02

Prove the product before building the story. Performance earns the shelf.

03

Pick one or two commitments and make them permanent. Trust compounds.

04

Run the cue audit. Could a stranger see your sustainability contribution without reading a word?

05

Map the category baseline. Then build the ceiling.

06

Run the honesty audit. What do consumers already suspect and would trust you more for confirming?

07

Remove the penalty. If the sustainable version costs more, you're punishing the right choice.

08

Ask what people DO differently because of you, not what you say about sustainability.

09

Test your inclusion commitment against a product brief, not just a comms brief.

10

Does the creative demonstrate the position or describe it? Could only your brand have made it?

11

Does the creator already believe the value? If not, it's endorsement, not translation.

12

Map the local anxiety hierarchy, not the global one. Sustainability speaks with an accent.

PART 5

Making it useful

Where does your brand stand?

The 12 principles are not a checklist to complete in order. They describe the different ways leading brands make sustainability work. Some will be more relevant to your brand than others, depending on your category, your market, and where you are starting from.

The diagnostic below is designed to help you and your team have a structured conversation about where your brand is strong, where it has gaps, and where the biggest opportunities lie. It is not a score. It is a starting point for action.

How to use it

For each of the 12 principles, ask your team to place your brand in one of four positions:

POSITION	WHAT IT MEANS
This is us	The brand already does this well. Consumers would recognise it. There is evidence in the product, the experience or the communications.
We've started	There is activity here, but it is not yet visible or consistent enough for consumers to associate it with the brand.
Gap	The brand is not doing this, and it matters in our category or market. This is an opportunity.
Not relevant	This principle does not apply to our category, market or brand model. Move on.

The diagnostic

Principle	This is us	We've started	Gap	Not relevant
01 Not an agenda. An amplifier. Is sustainability strengthening what the brand already means to people, or does it sit beside the core proposition?				
02 Performance is the entry ticket. Does the sustainable version of our product or service perform as well as or better than the conventional alternative?				
03 You can't buy it in a quarter. Have we been consistent enough, for long enough, for consumers to believe this is who we are?				
04 Show it. Don't say it. Can someone encountering the brand for the first time understand our sustainability contribution before reading detailed copy?				
05 Don't just meet the expectation. Move it. Are we doing what the category already expects, or are we raising the bar in a way competitors will have to follow?				
06 Honesty outperforms perfection. Are we naming what is hard, showing progress honestly, and resisting the temptation to over-polish the story?				
07 No penalty for the right choice. Does the sustainable choice cost more, take more effort, or feel harder to find than the conventional one?				
08 The participant is the proof. Can consumers play an active role in our sustainability story, or are they only spectators?				
09 Inclusion is who you serve, not just who you cast. Is inclusion built into what we offer and who it works for, or is it primarily a communications choice?				
10 Let creativity carry the conviction. Is our sustainability story being carried by strong creative ideas, or does it rely on explanation and information?				
11 Creators help the message travel. Are we using creator voices to bring sustainability into spaces and communities the brand cannot reach on its own?				
12 Sustainability speaks with an accent. Are we adapting our sustainability story to what matters locally, or running a single global message everywhere?				

What to do with the results

The goal is not to turn every row green. It is to identify two or three principles where closing the gap would make the biggest difference to how consumers perceive and reward your brand on sustainability.

A few prompts to guide prioritisation:

- **Where is the gap most visible to consumers?** A gap in Principle 04 (Show it) or 07 (No penalty) is one consumers experience directly. A gap in Principle 11 (Creators) may be less immediately felt. Start where the consumer impact is highest.
- **Where are competitors already moving?** If your category leaders are raising the bar (Principle 05), standing still is not neutral. It means falling behind in relative terms.
- **Where does your brand have a natural advantage?** Some principles will connect more naturally to your brand's existing strengths. A heritage brand may find Principle 03 (Consistency) is already working. A design-led brand may have a head start on Principle 04 (Show it). Build from where you are strong.
- **What does your market reward?** The ranking shows that what consumers value varies enormously by country. Before investing, map the local priorities. Principle 12 is not just one of the twelve. It is a filter for all the others.

Going deeper

This diagnostic gives you a directional view based on your team's own assessment. For a consumer-led, data-driven version of the same question, a full BrandSustainability study measures how your brand is actually perceived on sustainability by consumers in your category and market, whether those perceptions are helping or holding back your equity, and where the most efficient routes to growth lie.

The ranking you have just read uses the same metrics, applied across 2,160 brands. A brand-specific study applies them to yours.

To find out more, visit kantar.com/campaigns/brandsustainability

Get in touch

SustainableTransformation@kantar.com

At Kantar, we are committed to providing the strategic intelligence you need for your brand to drive growth with sustainability.

We can help your brand's sustainability strategy in multiple ways:

UNDERSTAND TRENDS, SECTOR AND MARKET

Use [Sustainability Sector Index](#) and Analytics to reveal how sustainability is shaping your category and competitive landscape.

DRIVE BRAND EQUITY

Use [BrandSustainability](#) to assess how your brand is perceived on sustainability with validated metrics and identify where to focus to drive brand equity.

ENGAGE UNDER-REPRESENTED GROUPS

Understand how under represented audiences perceive your brand and where inclusion can drive growth with [Brand Inclusion Index](#).

UNDERSTAND YOUR AUDIENCES

Use [Bridging the Gap](#) insights to identify sustainability attitudes and behaviours across your audience groups.

LAND YOUR SUSTAINABILITY MESSAGES

Look at [Kantar's and Ad Net Zero ad tracker insights](#) to understand how sustainable behaviours messaging lands and how well they support greener advertising goals.

INNOVATE SUSTAINABLY

[Evaluate sustainable innovations](#) to ensure they meet real consumer needs and deliver impact.