

Ethical Retailing - Europe - 2023

Report Price: £350 | \$495 | €450

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- How the rising cost of living affects consumers' ethical consumption and shopping
- Consumer perceptions of what makes an ethical brand/company
- Ethical shopping behaviours over the last 12 months
- Motivators for ethical shopping practices
- Opportunities for retailers to promote ecologically and socially responsible products and services.

Based on data from Mintel GNPD, in 2022 ethical and environmental claims on product launches in Europe accounted for between 24% of all product launches (France and the UK) and 27% (in Italy), the highest level over the past five years. Environmentally friendly packaging accounted for between 68% (in Germany, Italy and Spain) and 84% (in the UK) of product launches with ethical claims in 2023 making it the leading type of claim. Retailers and brands need to make claims on products easy to understand and more importantly give consumers a way to verify these claims themselves. Indeed, our consumer research reveals that between more than a quarter (26% in the UK) and 16% (in France) of consumers across the five leading economies of Europe say that they would be more likely to choose ethical products instead of standard ones when they can verify their claims (eg on a credited website).

There are many ways to define ethical retailing. Our consumer research for this report reveals between half (in Italy) and more than a third (34% in the UK) of consumers in Europe define an ethical brand by whether it promotes sustainability (eg recyclable packaging). As the issues of plastic pollution and landfill become a greater concern for consumers, it is vital that retailers remain innovative in how they produce, package and sell their products in order to become more sustainable. Furthermore, between almost a third (32% in Italy) and 46% (Spain) of consumers surveyed regard treatment of workers as a sign of an ethical brand, and between 16% (Italy) and 30% (the UK) consider fair treatment of suppliers.



"With growing sustainability awareness ethical retailing has emerged as one of the most dynamic areas of the European retail landscape in recent years. Fuelled by shifting consumer priorities, we are seeing ethical and sustainability credentials and initiatives becoming ever more important."

- Utku Tansel, European Retail Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Clearly shopping ethically is harder when money is tight. Brands need to further highlight the benefits of purchasing an ethically certified product in order to justify their purchase especially as cost of production increases. Retailers need to highlight the significant affordability benefits for consumers around sustainability. For example, incentives such as lower prices if consumers recycle or refill should work well. Our survey highlights that cost is a major factor when making purchase decisions for ethical products in Europe. Indeed, between 61% (in France) to more than half 52% (in Germany) of European consumers said they would be more likely to choose ethical products instead of standard ones when they are affordable. In addition, between 44% (in France) and 38% (in Italy) of consumers in Europe would be more likely to choose ethical products instead of standard ones when they are on offer.

There is growing interest in buying recycled used products as well as upcycled/ repaired products across Europe in many categories and retailers have been responding accordingly. The trend is driven from several directions. There is an increase in "conscious consumerism", with people looking for ways to reduce their own individual impact on the environment. But also, as the cost of living is going up, many consumers are looking at ways to save money where they can.

There are also opportunities to explore new avenues, such as rental. Indeed, between almost a third (32% in Italy) and almost a fifth (19% in the UK) of consumers said they would be interested in renting products (i.e. clothing, furniture) in future. In fashion, this presents good prospects in certain categories that consumers are less likely to need to own, such as childrenswear, maternitywear and skiwear.

Sustainability is a key trend across Europe with consumers looking for ways to conserve the planet's resources. But turning this sentiment into action can prove difficult for consumers, meaning retailers and brands stand to gain from making it easier for them to live sustainably. Subsidies and rewards can encourage more ethical behaviours, as can emphasising the personal benefits for the consumer of buying more ethical products and services. But in tough economic times introducing initiatives such as price reductions or free gifts, which make sustainable choices more sensible, is likely to be popular.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Products covered in this Report**

EXECUTIVE SUMMARY – EUROPE – THE MARKET

- **The five-year outlook for ethical retailing**
Figure 1: Outlook for ethical retailing, 2023–28
Figure 2: Europe: ethical & environmental claims as % of all new product launches, 2018–23
- **Environmentally-friendly packaging tops claims across Europe**
Figure 3: Europe: Leading claims on new product launches with claims matching “Ethical & Environmental”, 2023
- **Consumers feel the pinch...**
Figure 4: Europe: Financial wellbeing by country, 2023
Figure 5: Europe: Future financial confidence, 2023

EXECUTIVE SUMMARY – EUROPE – LAUNCH ACTIVITY & INNOVATION

- **Incorporating sustainability into store experience**
Figure 6: E.Leclerc, France
- **Refills come to the fore**
Figure 7: Lidl’s smart detergent station
- **Recycling moves up the agenda**
Figure 8: Currys Cash for Trash initiative
- **Circular economy efforts intensify**
Figure 9: Carrefour – TerraCycle – Bic, Tefal, Philips, Dim and Hasbro recycling kiosk
- **Retailers offer more rental initiatives**
- **Grocers help consumers to reduce food waste**
- **Eco-friendly packaging**
Figure 10: Examples of Sainsbury’s products with reduced plastic, 2023
- **Retailers launch own label sustainable ranges**
- **The rise of inclusivity and diversity**
Figure 11: George at Asda Easy on adapted clothing range
Figure 12: Tesco’s first Ramadan campaign, 2022
- **Retailers help households with the cost-of-living crisis**
- **Making it easier to identify/locate ethical products**
Figure 13: Tesco’s Better Basket campaign

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

EXECUTIVE SUMMARY – EUROPE – THE CONSUMER

- **Defining ethical brands and retailers**
- **Sustainable packaging at the forefront for ethical brands**
- **Consumers look for ethical sourcing**

Figure 14: Europe: How consumers define ethical brands/retailers, 2023

- **Brands should promote transparency**
- **Consumers define ethical as cruelty-free products**
- **Ethical shopping behaviours**
- **High levels of interest in locally made**

Figure 15: Europe: Ethical shopping behaviours, have done in the last 12 months, 2023

- **Circular economy presents good opportunities**
- **Motivations for shopping ethically**
- **Price key to motivating consumers to shop with ethical brands**
- **Consumers seek transparency**

Figure 17: Europe: Motivations for buying ethical products, 2023

FRANCE

- **Overview**
 - **Key issues covered in this Report**
 - **Products covered in this Report**
 - **Consumer research**
 - **Market context**
 - **Executive summary**
 - **The five-year outlook for ethical retailing in France**
- Figure 18: France: Outlook for ethical retailing, 2023–28
- **Market drivers**
 - **Price and value has shifted priorities away from ethical shopping**
 - **People believe they can make a difference**
- Figure 19: France: Key factors driving consumer behaviour around Surroundings, 2023
- **France leads the way with legislation**
 - **And also tries to make it easy for consumers to make ethical choices**
 - **Launch activity and innovation**
 - **Carrefour launches recycling kiosks in its car parks with TerraCycle**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **FnacDarty expands repairs capacity**
- **Decathlon and Groupe Eram accelerate circularity in footwear**
- **Gémo develops its clothing rental offer**
- **DIY retailer ManoMano launches “Carbon Score”**
- **IKEA France delivering furniture by boat in Paris**
- **The consumer**
- **What is an ethical retailer?**
Figure 20: France: How consumers define ethical brands/retailers, 2023
- **Ethical shopping behaviours**
Figure 21: France: Ethical shopping behaviours, 2023
- **Motivations for shopping ethically**
Figure 22: France: Encouraging Factors for Shopping Ethically, 2023
- **Issues and insights**
- **What the cost-of-living crisis means for ethical retailing in France**
- **Combine affordability with ethical-claims**
- **Emphasise other forms of value**
- **Transparency for all to see**
- **Market drivers**
- **Squeezed budgets hold back spending on ethical products**
- **Increasing frequency of extreme weather events is heightening awareness**
- **But people believe they can make a difference**
Figure 23: France: Key factors driving consumer behaviour around Surroundings, 2023
- **Cost deters organic shopping**
Figure 24: France: Factors that would encourage buying of organic food and drink, 2023
- **Growing focus on reducing meat consumption to help the planet**
- **GNPD Data - Brands responding to consumers' sustainability demands**
Figure 25: France: ethical & environmental claims as % of all new product launches, 2018-22
- **Environmentally friendly packaging is top ethical claim**
Figure 26: France: Leading claims on new product launches with claims matching “Ethical & Environmental” 2023
- **Made in France – a need for clarity**
Figure 27: France: Reasons for buying domestically-made food and drink products, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Making it easy to recycle
- Regulatory and legislative changes
- France has introduced many world-first legislative measures
- Loi EGAlim
- AGECE – the Anti-Waste Law
- Repairability Index (indice-reparabilité)
- The Repair Bonus (bonus-reparation)
- The Loi Garot
- MaPrimeRénov – financial aid for environmentally friendly home improvements
- The 2023 anti-food waste certificate

Figure 28: France: Anti-waste certificate, one, two and three stars

- Legislating for seasonality
- Anti-greenwashing law came into force in January 2023
- Launch activity and innovation
- Recycling and the circular economy
- Carrefour launches recycling kiosks in its car parks with TerraCycle

Figure 29: Carrefour Recycling kiosk in collaboration with TerraCycle

- Boulanger buys back used electricals
- FnacDarty expands repairs capacity
- Nature & Découvertes collects and redistributes used products
- Decathlon and Groupe Eram accelerate circularity in footwear
- Géméo develops its clothing rental offer
- Product sustainability
- DIY retailer ManoMano launches “Carbon Score”
- For Digital Cleanup Day, Boulanger raises awareness about the sustainability of digital products
- Avoiding waste
- Carrefour grows commitment to tackling food waste
- Paper promotional leaflets are disappearing
- Auchan trials packaging-free shop-in-shop
- Promoting clean energy
- Carrefour Énergies now has 100 electric vehicle charging stations in France
- IKEA France is now delivering furniture by boat in Paris
- Helping consumers through the cost-of-living crisis
- E.Leclerc freezes prices on 1,000 Eco+ products

What's included

Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook
Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Cashback to fight inflation at Les Comptoirs de la Bio**
- **Steps to improve diversity**
- **For World Autism Awareness Day Carrefour steps up its support**
- **Boulangier trains its employees in sign language**
- **Localism trend favours "Made in France"**
- **Système U promotes 100% French fashion**
- **100% French 3D knitwear at Gémio**
- **The consumer**
- **Defining ethical brands and retailers**
- **Retailers must embrace sustainability to be considered "ethical"**
- **Treat workers fairly**
- **Women define ethical as cruelty-free**
- **Inclusivity concerns young people most**

Figure 30: Système U, Made in France clothing range

Figure 31: France: How consumers define ethical brands/retailers, 2023

Figure 32: France: How consumers define ethical brands/retailers, by age groups, 2023

- **Ethical shopping behaviours**
- **Two thirds have bought locally produced**
- **The circular economy is growing**
- **Potential in reusable food containers**
- **Repairs can draw people into stores**
- **Niche potential for renting or hiring**
- **Motivations for shopping ethically**
- **Cost is the main barrier to buying ethical products**
- **But value is more than price**
- **Clarity needed to avoid greenwashing**

Figure 33: France: Ethical shopping behaviours, 2023

Figure 34: France: Ethical shopping behaviours, 2023

Figure 35: France: Encouraging Factors for Shopping Ethically, 2023

- **Appendix – Data Sources, abbreviations and supporting information**
- **Consumer research methodology**
- **Abbreviations**
- **Data sources**

ITALY

- **Overview**
- **Key issues covered in this Report**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Products covered in this Report**
- **Consumer research**
- **Market context**
- **Executive summary**
- **The five-year outlook for ethical retailing in Italy**
Figure 36: Italy: Outlook for ethical retailing, 2023-28
- **Market drivers**
- **Cost of living crisis temporarily shifts consumer focus away from sustainability**
- **People are still optimistic**
- **Brands are responding to demand for ethical products**
- **Legislation is forcing retailers to change**
- **Launch activity and innovation**
- **Sustainable delivery options help reduce environmental impact**
- **Commitments to eco-friendly operations strengthen**
- **Combatting food waste**
- **The consumer**
- **Defining ethical retailers**
Figure 37: Italy: How consumers define ethical retailers, 2023
- **Ethical shopping behaviours**
Figure 38: Italy: ethical shopping behaviours in the last 12 months, 2023
- **Motivations for shopping ethically**
Figure 39: Italy: factors that would encourage people to buy ethical products instead of standard ones, 2023
- **Issues and insights**
- **What the cost-of-living crisis means for ethical retailing in Italy**
- **Pressures on household finances are not going to go away any time soon**
- **Increase choice of own label ethical products**
- **Make the argument for quality as a way of saving money with ethical products**
- **Increase ranges of second-hand/refurbished products**
- **Offer rental options**
- **What can retailers do to stimulate demand for ethical products?**
- **Look to stimulate trial/take-up of ethical products**
- **Work to improve transparency**
- **Improve in-store/online signage and navigation to highlight ethical options**
- **Take more responsibility for recycling**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Market drivers**
- **Early signs of economic stabilisation...**
- **Inflation is slowing, but expected to stay above pre-crisis levels through 2023/24**
Figure 40: Italy: key economic projections, annual percentage change, 2019-24
- **A full consumer recovery could take years**
Figure 41: Italy: Consumer Financial confidence, 2022-23
- **Extreme weather increases urgency on climate change**
- **But the Italian government has been slow to act**
- **People are trying to make their own contributions**
Figure 42: Italy: Key factors driving consumer behaviour around Surroundings, 2023
- **Price deters buying organic**
Figure 43: Italy: Factors that would encourage buying of organic food and drink, 2023
- **Meat consumption is falling**
- **Food waste awareness campaign**
- **GNPD Data – Brands are responding to demand for ethical products**
Figure 44: Italy: ethical & environmental claims as % of all new product launches, 2018-23
- **Environmentally-friendly packaging is the top ethical claim in product launches**
Figure 45: Italy: Leading claims on new product launches with claims matching "Ethical & Environmental", 2022
- **Made in Italy**
- **Regulatory and legislative changes**
- **The Gadda law**
- **National plan for adaptation to climate change (Piano Nazionale di adattamento ai cambiamenti climatici) or PNACC**
- **Launch activity and innovation**
- **Sustainable delivery options help reduce environmental impact**
- **Commitments to eco-friendly operations strengthen**
- **Retailers introduce energy saving measures at stores**
- **Sustainable production processes a priority**
- **Circular economy comes to the fore in fashion**
- **Fight against food waste gains pace**
- **The consumer**
- **Defining ethical brands and retailers**
Figure 46: Italy: How consumers define ethical retailers, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Defining ethical retailers by age**

Figure 47: Italy: How consumers define ethical retailers, by age group, 2023

- **Ethical shopping behaviours**

- **Behaviours in the last 12 months**

- **Interest in ethical behaviours for the future**

Figure 48: Italy: ethical shopping behaviours in the last 12 months, 2023

- **How ethical shopping behaviours vary by gender**

Figure 49: Italy: ethical shopping behaviours in the last 12 months, by gender, 2023

- **How ethical shopping behaviours vary by age**

Figure 50: Italy: ethical shopping behaviours in the last 12 months, by age group, 2023

- **Interest in ethical behaviours for the future by gender**

Figure 51: Italy: ethical shopping behaviours interested in doing in the future, by gender, 2023

- **Interest in ethical behaviours for the future by age**

Figure 52: Italy: ethical shopping behaviours interested in doing in the future, by age group, 2023

- **Motivations for shopping ethically**

- **Are affordability and ethical retailing compatible?**

- **Affordability as part of a circular model**

- **Encouraging switching to ethical products through offers**

- **Transparency is key**

- **Quality of standard products needs to be exceeded by ethical products**

- **In-store merchandising has its role to play**

Figure 53: Italy: factors that would encourage people to buy ethical products instead of standard ones, 2023

- **Factors that would encourage people to buy ethical products by gender**

Figure 54: Italy: factors that would encourage people to buy ethical products instead of standard ones, by gender, 2023

- **Factors that would encourage people to buy ethical products by age**

Figure 55: Italy: factors that would encourage people to buy ethical products instead of standard ones, by age group, 2023

- **Appendix – Research methodology, data sources and abbreviations**

- **Consumer research methodology**

- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Data sources

SPAIN

- **Overview**
- **Key issues covered in this Report**
- **Products covered in this Report**
- **Consumer research**
- **Market context**
- **Executive summary**
- **The five-year outlook for ethical retailing in Spain**
Figure 56: Spain: Category outlook, 2023–28
- **The consumer**
- **Defining ethical brands and retailers**
Figure 57: Spain: How consumers define ethical retailers, 2023
- **Ethical shopping behaviours**
Figure 58: Spain: Ethical shopping behaviours, 2023
- **Ethical shopping motivators**
Figure 59: Spain: Motivating factors for choosing ethical products instead of standard ones, 2023
- **The market**
- **Cost-of-living crisis having a big impact on consumption and purchasing behaviour**
- **Financial security back to the top of the agenda for many consumers**
- **Launch activity and innovation**
- **Return and refill options and packaging alternatives**
- **Sustainable fabrics, fashion resale and rental**
- **Upcycling food that would otherwise go to waste and discounting soon-to-expire food**
- **Issues and insights**
- **Rental offers wallet-friendly way to shop ethically in cost of living crisis**
- **Own-label provides a more affordable way to shop ethical products**
- **Market Drivers**
- **Cost-of-living crisis impacting consumption habits**
- **Consumers have competing life priorities, so brands must take the lead**
Figure 60: Spain: Changes in priorities as a result of the cost of living crisis, 2023
- **Ethically-driven behaviour slipping in cost-of-living crisis**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 61: Spain: Key factors driving consumer behaviour around Surroundings, 2019-23

- **Weather events raise awareness of climate change**
- **More ethical products on shelves can influence where consumers shop**

Figure 62: Spain: ethical & environmental claims as % of all new product launches, 2018- 23

- **Price is a barrier, but consumers will trade up to ethical goods in categories that matter to them**

Figure 63: Spain: ethical and environmental claims on new product launches, by category, 2022

- **Eroski ramps up eco-friendly certification product offering**

Figure 64: Spain: Percentage share of new product launches carrying selected environmental and ethical claims, by retailer and manufacturer, 2022

- **Regulatory and legislative changes**
- **Launch activity and innovation**
- **Return and refill options and packaging alternatives to reduce plastic pollution**
- **Sustainable fabrics, fashion resale and rental**
- **Upcycling food that would otherwise go to waste and discounting soon-to-expire food**
- **The consumer**
- **Defining ethical brands and retailers**
- **Fair treatment of workers is the quality consumers look for most**
- **Sustainability practices an important consideration for 39% of consumers**
- **26% of consumers look for recognisable ethical product certification**

Figure 65: Spain: How consumers define ethical retailers, 2023

Figure 66: Spain: How consumers define ethical brands/retailers, by age groups, 2023

Figure 67: Spain: How consumers define ethical brands/retailers, by age groups, 2023

Figure 68: Spain: How consumers define ethical brands/retailers, by age groups, 2023

- **Ethical shopping behaviours**

Figure 69: Spain: Ethical shopping behaviours, 2023

- **Consumers prioritising locally produced products**

Figure 70: Spain: Ethical shopping behaviours, buying locally produced,

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Buy-back schemes can help retailers meet sustainability targets**

Figure 71: Spain: Ethical shopping behaviours, recycled products, 2023

- **Consumers making the most of things they already have**

Figure 72: Spain: Ethical shopping behaviours, upcycled/ repaired, 2023

- **Spending more on products that are built to last, an opportunity in clothing**

Figure 73: Spain: Ethical shopping behaviours, spent more on better quality, 2023

- **Refillable purchasing**

Figure 74: Spain: Ethical shopping behaviours, used reusable containers, 2023

- **Consumers hungry to save on their grocery bills**

Figure 75: Spain: Ethical shopping behaviours, bought food that otherwise would have gone to waste, 2023

- **Convince consumers your products aren't just worth buying once, but over and over again, with resale**

Figure 76: Spain: Ethical shopping behaviours, bought second-hand, 2023

Figure 77: Spain: Ethical shopping behaviours, sold unwanted items, 2023

- **Motivations for shopping ethically**

Figure 78: Spain: Motivating factors for choosing ethical products instead of standard ones, 2023

- **Ethical products are too expensive**

Figure 79: Spain: Motivating factors for choosing ethical products instead of standard ones, they are affordable, by age and financial situation, 2023

- **Discounts a key motivator for those whose financial situation has become more precarious**

Figure 80: Spain: Motivating factors for choosing ethical products instead of standard ones, products on special offer, by age and financial situation, 2023

- **Over 40% would buy ethical if they find they are easy to locate**

Figure 81: Spain: Motivating factors for choosing ethical products instead of standard ones, easy to locate, by age, 2023

- **31% want ethical products to be superior quality**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 82: Spain: Motivating factors for choosing ethical products instead of standard ones, higher quality, by age and net monthly household income, 2023

- **Consumers want certifications and assurances from brands**

Figure 83: Spain: Motivating factors for choosing ethical products instead of standard ones, certification, by age, 2023

- **Ecolabelling can help consumers make better-informed choices about the products they buy**

Figure 84: Spain: Motivating factors for choosing ethical products instead of standard ones, information on packaging, by age, 2023

- **Referrals from friends and family can drive ethical products purchasing**

Figure 85: Spain: Motivating factors for choosing ethical products instead of standard ones, friend/family recommendations, by age, 2023

- **Rewarding ethical shopping behaviour**

Figure 86: Spain: Motivating factors for choosing ethical products instead of standard ones, getting something in return, by age and net monthly household income, 2023

- **Messaging around conscious gifting getting louder**

Figure 87: Spain: Motivating factors for choosing ethical products instead of standard ones, buying as a gift, by age, 2023

- **Appendix – Research methodology, data sources and abbreviations**

- Consumer research methodology
- Abbreviations
- Data sources

UK

- Overview
- Executive Summary
- The Market
- **Consumers' financial wellbeing has fallen from the highs of 2021...**

Figure 88: Household financial wellbeing index, 2016-23

- **Consumer spending power will be curbed**
- **People are environmentally aware**

Figure 89: Key factors driving consumer behaviour around Surroundings, 2023

- **Companies and brands**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Ethical claims increase 7.7% in 2022**
Figure 90: Ethical claims on products between 2018–2023
- **Environmentally friendly packaging is a top ethical claim**
Figure 91: Leading ethical claims by type, 2022
- **Selfridges reveals 'The Stock Market' pre-loved pop-up**
Figure 92: The Stock Market pop-up, 2023
- **Grocers help consumers manage food waste**
- **Asda creates dedicated page to provide hints and tips on how to prevent food waste**
Figure 93: Asda food waste webpage, 2023
- **The consumer**
- **Promoting fair treatment of workers best defines an 'ethical retailer'**
Figure 94: Aspects that best define an ethical retailer, 2023
- **Over three fifths have recycled used products in the past 12 months**
Figure 95: Ethical shopping behaviours and future interests when shopping ethically, 2023
- **Recycling areas in-stores is a must-have for retailers**
Figure 96: Ethical services that would encourage consumers to choose one retailer over another, 2023
- **Get the ethical shopping mix right**
Figure 97: TURF Analysis – Ethical Retailing, April 2023
- **Make ethical products affordable**
Figure 98: What would make consumers choose ethical products over standard ones, 2023
- **Cost-of-living crisis hampers consumer's ethical agendas**
Figure 99: Cost-driven ethical behaviours, 2023
- **Consumers want more legislation from governments but look to retailers for clarity on claims**
Figure 100: Ethical Behaviours, 2023
- **Pricing should reflect the quality of ethical products**
Figure 101: Value-led ethical behaviours, 2023
- **Consumers willing to switch if it means they can buy more ethically**
Figure 102: Ethical shopping behaviours, 2023
- **Issues and Insights**
- **Appeal to cost-driven shoppers and highlight the financial benefits of shopping ethically**
- **Couple ethical claims with saving benefits**
- **A 'less is more' approach signals higher quality products**
- **Make ethical products more affordable through incentives and rewards**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Clear up confusion of ethical claims to empower consumers**
- **Increase credibility for ethical claims through better transparency**
- **Empower shoppers to make the ethical choice**
- **Ethical New Product Development and Innovation**
- **Ethical claims increase 7.7% in 2022**

Figure 103: Ethical claims on products between 2018–2023

- **Environmentally friendly packaging top ethical claim**

Figure 104: Leading ethical claims by type, 2022

- **Project Cosmetics prints packaging with soy ink**

Figure 105: Example of innovating packaging, 2023

- **Nuddy's straightforward packaging helps simplify claims**

Figure 106: Example of simple on-pack language, 2023

- **Sainsbury's continues its commitment to reduce plastic from its own products**

Figure 107: Examples of Sainsbury's products with reduced plastic, 2023

- **Colour cosmetics top product category for ethical claims**

Figure 108: Leading product categories with ethical claims, 2022

- **Victoria Beckham launches sustainably-minded colour cosmetics**

Figure 109: Example of sustainable cosmetics by Victoria Beckham, 2023

- **Skincare brands highlight their sustainability ethos**

(Figure 110: Examples of brands with strong sustainability ethos, 2023)

- **Ethical Retail Launch Activity**

- **Selfridges reveals 'The Stock Market' pre-loved pop-up**

Figure 111: The Stock Market pop-up, 2023

- **eBay launches 'Better Than New Homewares' Hub**

- **John Lewis adds maternitywear to rental offer**

Figure 112: John Lewis maternity rental wear, 2023

- **Decathlon rolls out rental service to all its stores**

- **Grocers help consumers manage food waste**

- **Asda creates dedicated pages to provide hints and tips on how to prevent food waste**

Figure 113: Asda food waste webpage, 2023

- **M&S to remove 'use by' dates on milk in bid to reduce waste**

- **Retailers close the loop**

- **Primark launches first circular product range in order to "give clothes a longer life"**

- **Coach reveals new circular sub-brand**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 114: Coach's circular Coachtopia brand, 2023

- **Milk & More team up with reusable packaging start-up Again**
- **Inclusivity and diversity matter**
- **L'Oréal and Lancôme's unveil 'HAPTA'**
- **Dove launches #TurnYour Back campaign**
- **Levi's test AI-generated models to 'increase diversity'**
- **Regulatory and Legislative Changes**
- **Environmental Land Management Schemes replace CAP farm subsidies**
- **COP15 sets goal to protect 30% of land and waters**
- **DRS in Scotland delayed to March 2024**
- **Plastic Packaging Tax comes into force, Extended Producer Responsibility due in 2024**
- **Reforms aim to reduce landfill and drive recycling rates**
- **Courtauld Commitment 2030 spans food waste, greenhouse gas emissions and water stress**
- **EU to make companies accountable for their supply chains**
- **Brand Research**
- **Lush takes the lead on ethicality**

Figure 116: Lush Shop Again store at its Green Hub, 2023

Figure 117: Lush Refugees Welcome bath bomb, 2023

- **Boots helps support women's health**
- **M&S champions 'British made'**
- **Figure 118: Top ranking of selected retail brands*, by agreement with "ethical", 2021-23**
- **Shein looks to combat negative brand perceptions**
- **Primark works on its sustainability credentials**
- **Figure 119: Top ranking of selected retail brands*, by agreement with "unethical", 2021-22**

- **Brand research methodology**
- **Market Drivers**
- **Inflation will continue to eat into consumer spending power over the course of 2023**
- **High inflation and rising interest rates will compound the impact of the slowing recovery**
- **Consumer spending power will be curbed**
- **Consumers' financial wellbeing has fallen from the highs of 2021...**

Figure 120: Household financial wellbeing index, 2016-23

- **...and most people are feeling the effects of price rises**
- **People are environmentally aware**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 121: Key factors driving consumer behaviour around Surroundings, 2023

- **Eating less meat helps the planet and people's pockets**

Figure 122: Benefits associated with eating less meat, 2022

- **Accessibility the main barrier for refill usage amongst BPC shoppers**

Figure 123: Reasons for not using/being interested in BPC refill concepts, 2022

- **Defining Ethical Retailers**

- **Promoting fair treatment of workers best defines an 'ethical retailer'**

- **Promoting sustainability is a top criterion for ethical retailing**

Figure 124: Aspects that best define an ethical retailer, 2023

- **Equity, diversity and inclusivity matter to 16-34s**

Figure 125: Aspects that best define an ethical retailer, by age, 2023

- **Promoting sustainability and having ethically certified products are defining aspects for over 55s**

Figure 126: Percentage of consumers who think 'promotes sustainability' and has 'ethically certified products' best define an ethical retailer, by age, 2023

- **Ethical Shopping Behaviours**

- **Over three fifths have recycled used products in the past 12 months**

- **Buying locally produced products is a good way to support the environment**

- **Three in ten are interested in saving food destined for landfill**

Figure 127: Ethical shopping behaviours and future interests when shopping ethically, 2023

- **16-34s look to close the loop**

Figure 128: Percentage of consumer who have bought second-hand products and/or sold unwanted clothes, by age, 2023

- **Over 55s upcycle and buy locally produced products**

Figure 129: Percentage of consumers who have upcycled, recycled and/or bought locally produced products, by age, 2023

- **Ethical Efforts by Retailers Consumers Want**

- **Recycling areas in-stores is a must-have for retailers**

- **Incentives will help make ethical behaviours a habit**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Transparency needs to be a focus to gain trust from shoppers**
Figure 130: Ethical services that would encourage consumers to choose one retailer over another, 2023
- **Get the ethical shopping mix right**
Figure 131: TURF Analysis – Ethical Retailing, April 2023
- **Hybrid workers look for sustainable delivery options**
Figure 132: Percentage of consumers who would be encouraged by sustainable delivery options when choosing to shop at one retailer over another, by current working situation, 2023
- **Consumers Choose Ethical Products Over Standard Ones When...**
 - **Make ethical products affordable**
 - **Make choosing ethical products rewarding**
 - **Iron out inconveniences when shopping for ethical products**
Figure 133: What would make consumers chooses ethical products over standard ones, 2023
 - **Get the ethical product mix right**
Figure 134: TURF Analysis – Ethical Retailing, April 2023
 - **Price and quality matter for 16-34s when choosing between ethical and standard products**
Figure 135: What would make consumers chooses ethical products over standard ones, by age, 2023
- **Cost-of-Living Crisis and Ethical Retailing**
 - **Cost-of-living crisis hampers consumer's ethical agendas**
Figure 136: Cost-driven ethical behaviours, 2023
 - **Ethical agenda falls down in priority for lower earners**
Figure 137: : Ethical Retailing – CHAID – Tree output, April 2023
- **Ethical Retailing Behaviours**
 - **Consumers want more legislation from governments but look to retailers for clarity on claims**
Figure 138: Ethical Behaviours, 2023
 - **Pricing should reflect the quality of ethical products**
Figure 139: Value-led ethical behaviours, 2023
 - **Consumers willing to switch if its means they can buy more ethically**
Figure 140: Ethical shopping behaviours, 2023
- **Appendix – Data Sources, Abbreviations and Supporting Information**
 - **Abbreviations**
 - **CHAID Analysis**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Methodology**
- **How to read the CHAID Tree**
Figure 141: Ethical Retailing – CHAID – Table output, April 2023
- **TURF Analysis on factors that would make consumers chose an ethical product over a standard one**
- **Methodology**
- **How to read the TURF analysis**
Figure 142: Table – TURF Analysis – Ethical Retailing, April 2023
- **TURF Analysis on what factors would make consumers choose to shop at one retailer over another**
- **How to read the TURF analysis**
Figure 143: Table – TURF Analysis – Ethical Retailing, April 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.