



Do Consumers Value Sustainably Grown Certification?

Consumer Research conducted on behalf of SCS Global Services by Category Partners – March 2018

Key Findings

- When compared at different price levels, **Sustainably Grown packaged salad mix, potatoes and strawberries** all performed well against Organics and conventional products. Consumers are willing to pay a moderate price premium for Certified Sustainably Grown compared to conventional.
- The Kingfisher™ certification logo resonates very well with shoppers. Consumers liked the logo itself, and in general, like easily recognizable images that stand out and clearly define the product (similar to the USDA Organic logo).
- The Certified Sustainably Grown message without the Kingfisher logo (created for Private Label applications) was also well received by shoppers.
- Respondents were very appreciative of the website information provided on the package and the ability to learn more about the certification, sustainability, and the certified Sustainably Grown claim.
- Certified Sustainably Grown addresses a key concern identified by respondents – food safety – as well as other highly valued environmental and social responsibility attributes.
- 88% said if they saw the Certified Sustainably Grown scorecard online, they would click on the attributes to learn more.

Comments

- "This certification makes this product more appealing."
- "Makes me think this is a better product for our planet."
- "I like that it is certified: a company can say anything it likes, but to be certified is better."
- "I like the look of the sustainably grown symbol with the bird. It is eye catching."
- "I like the sustainably grown label; this tells me it is grown in the best possible way for me and the environment."

Research Firm

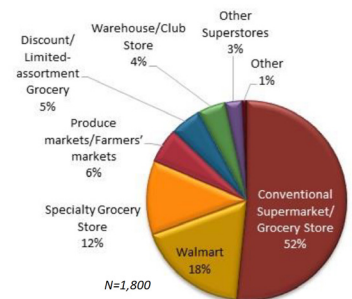
Category Partners is one of the leading third-party fresh produce analytics firms in the U.S. working with leading North American growers /shippers to provide information, data, and analytics to support and help retail customers make fact-based business decisions.



Research Participants

- 1800 adults across the US
- 60% female, 40% male
- Age 25-74
- Household Income: \$25K - \$150+ K

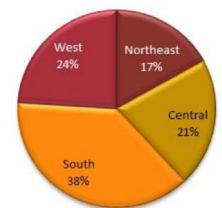
Where you most often buy produce



Research Design

- Certified Sustainably Grown® products (strawberries, potatoes, salad mix) compared to Organic and Conventional at standard, moderate premium, and high premium pricing.
- Compared use of the Kingfisher logo and certification message with a version developed for Private Labels featuring the message but without the logo.
- Package "hot spot" analysis
- Determine which sustainability attributes matter most
- Analysis of descriptive messaging

Region



Likelihood of clicking on one or more of these attributes from a website to learn more?

41% Extremely likely	10% Not very likely
47% Somewhat likely	2% Not at all likely

CERTIFIED SUSTAINABLY GROWN

Environmental Health
✓ Soil Protection
✓ Responsible Pest Management
✓ Reduce, Reuse, Recycling
✓ Water Conservation
✓ Climate Protection
✓ Ecosystem Protection
✓ Energy Efficiency
Social Responsibility
✓ Farmworker Health and Safety
✓ Community Engagement
Quality & Safety
✓ Non GMO
✓ Food Safety

“Consumer education is ALWAYS a good thing, it helps strongly promote the legitimacy of this producer.” – Study participant

Product and price comparisons:

Organic, Conventional, Kingfisher logo with Certified Sustainably Grown message, Certified Sustainably Grown message without logo



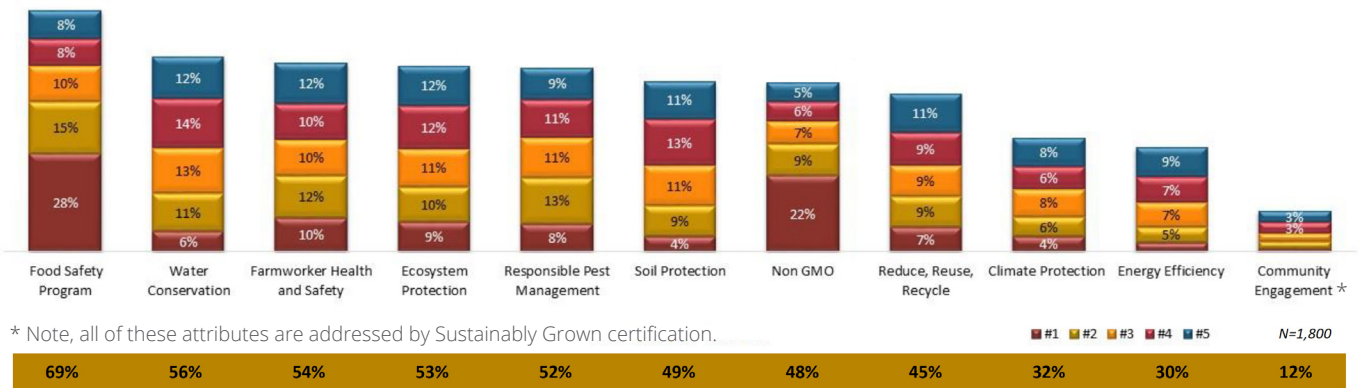
Which message appeals to you the most?	
Responsibly grown for the sake of your family, farmworkers and the environment	27%
Growing food responsibly to protect farmlands, farmworkers, and wildlife	25%
Food that meets the highest standards of environmental and social responsibility	22%
Putting food on your plate while protecting people and the planet	20%
Responsibly grown to protect farmworkers and the environment	6%

Messaging

Sustainably Grown can be summed up simply for consumers in POS materials and other collateral. This portion of the research indicated a wide latitude of consumer-friendly terms can be used to convey the essential message.

Relative importance of sustainability attributes to shoppers:

Please tell us which of the following are most important to you. (Please rank the top 5 attributes from 1 to 5, where 1 is most important)



Hot Spot Analysis

Used to pinpoint areas of the package label that attracted attention.

- Overall, respondents reacted positively, with 90-93% of the dots positive (green).
- Respondents were mainly positive about the messaging – they like that it is good for the environment, and that it is certified.

