



Trust Grows Here: **Why Sustainable Brands Win in Health and Nutrition**

Featuring:



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Trust Grows Here:

Why Sustainable Brands Win in Health and Nutrition

1 The Big Why

The sustainability imperative for brands

2 The Business Case of Sustainability

A framework to articulate the value of sustainability

3 The Lonza Capsugel Case-Study

A real example in action

4 The Puredia Case-Study

Beyond sustainability: Restoring the desert

5 Q&A

Feel free to use the chat to:

1. Introduce yourself
2. Post questions and comments

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Voyager 1 • Feb. 14, 1990 • Image courtesy of NASA/JPL-Caltech



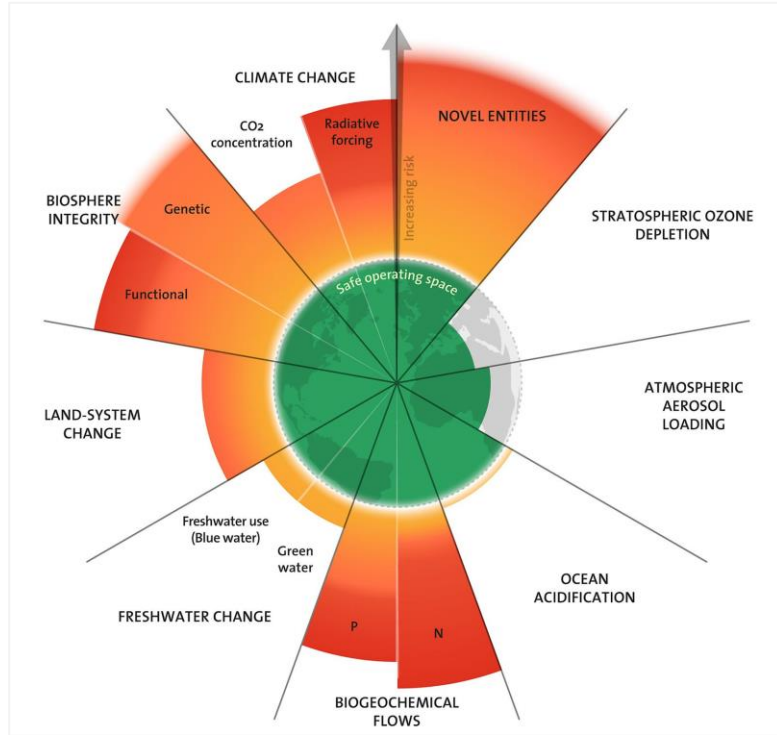
Apollo 8 • Dec. 24, 1968 • Image courtesy of NASA/Bill Anders



Artemis II • Apr. 6, 2026 • Image courtesy of NASA

PLANETARY BOUNDARIES:

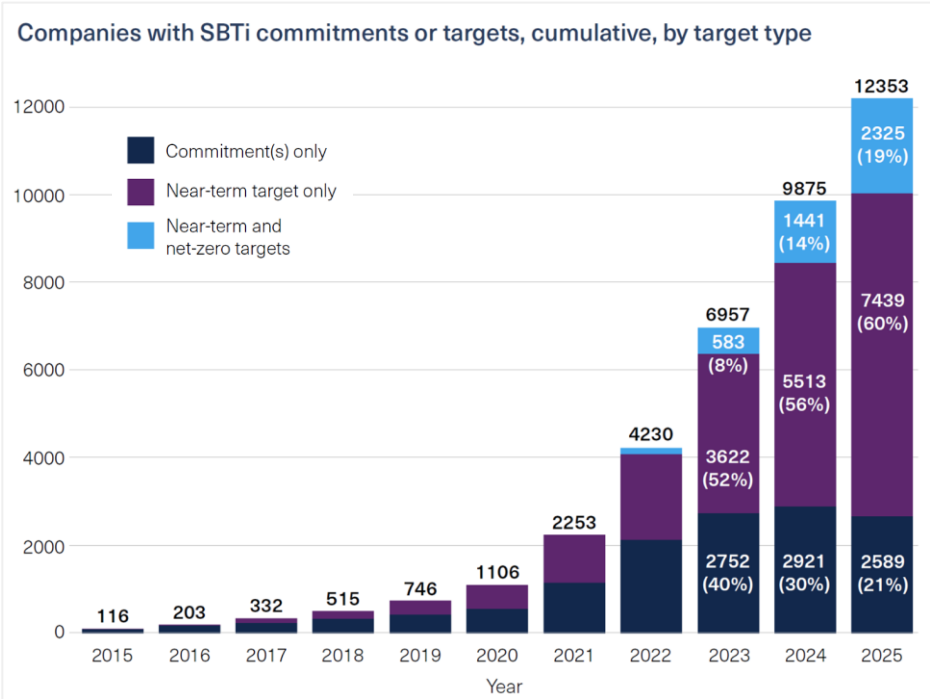
Why they matter for companies



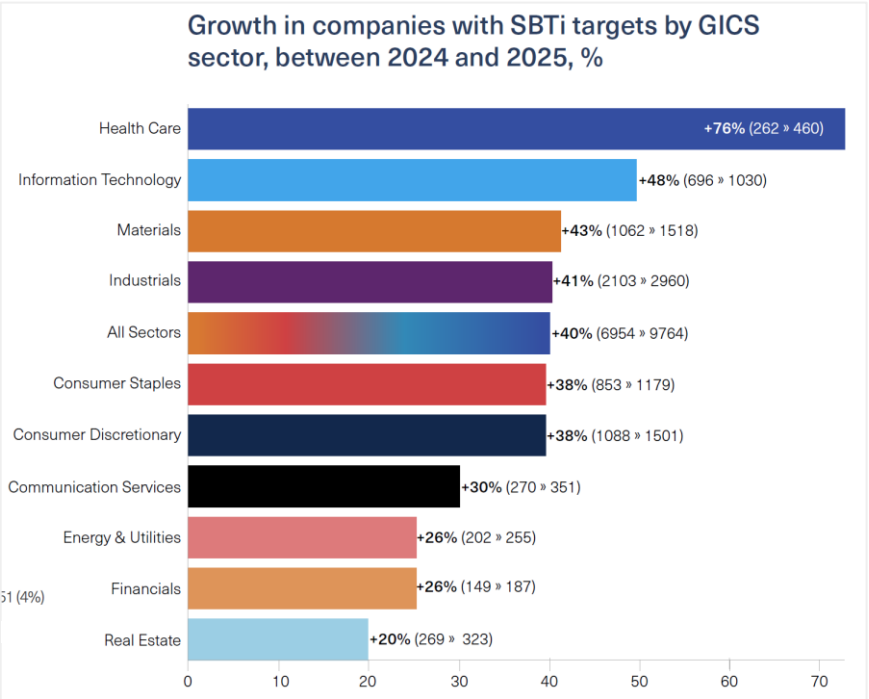
Source: Stockholm Resilience Centre

- Planetary boundaries define the safe operating space of key processes for Earth's stability
- We crossed 7 out of 9 planetary boundaries
- This is materially impacting companies:
 - Extreme weather can disrupt supply-chains
 - Biodiversity loss can reduce farm yields
 - Water scarcity can halt production
- There is a business case for sustainability
- Reducing negative impacts is not enough
- We need regenerative brands that can help bring Earth back to the safe zone

SCIENCE-BASED TARGETS:
12,000+ companies have committed to take action



Source: SBTi TREND TRACKER 2025, April 2026



Are these initiatives translating into marketplace success?

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THE ROI OF SUSTAINABILITY:

How sustainable brands can win in the marketplace

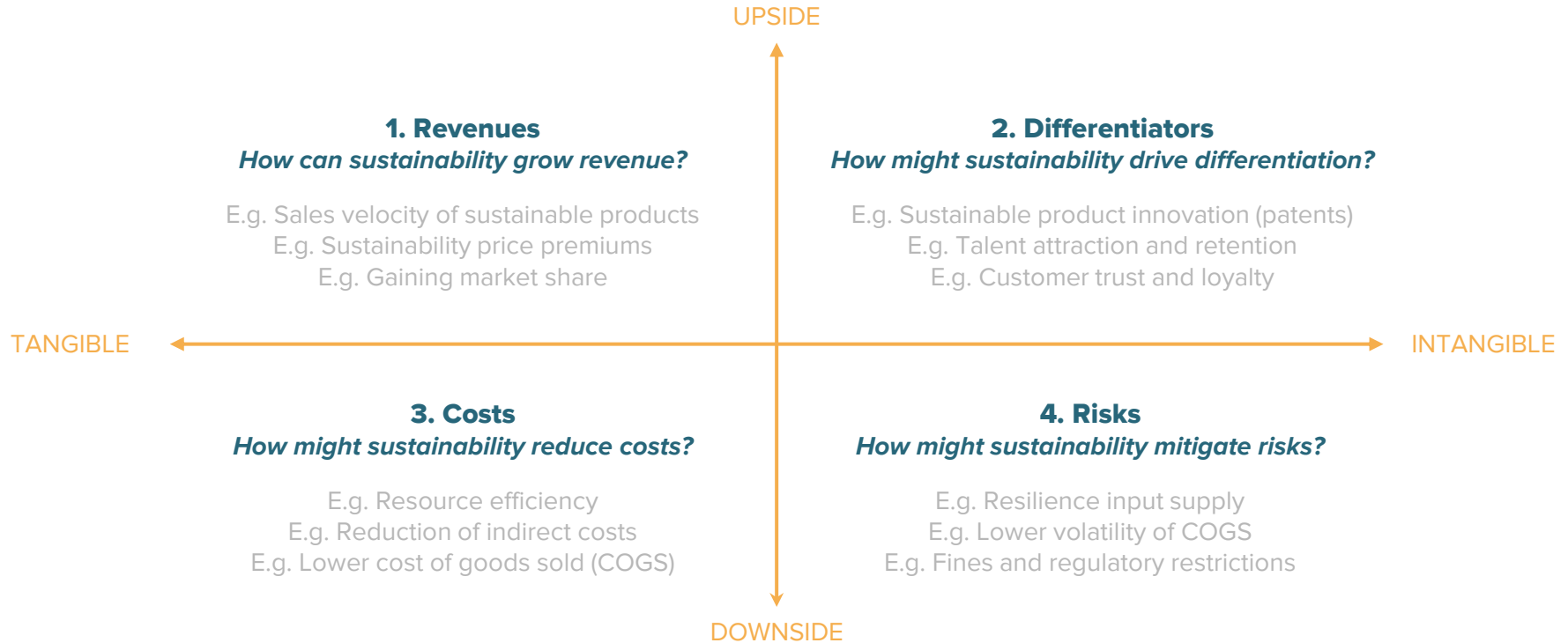
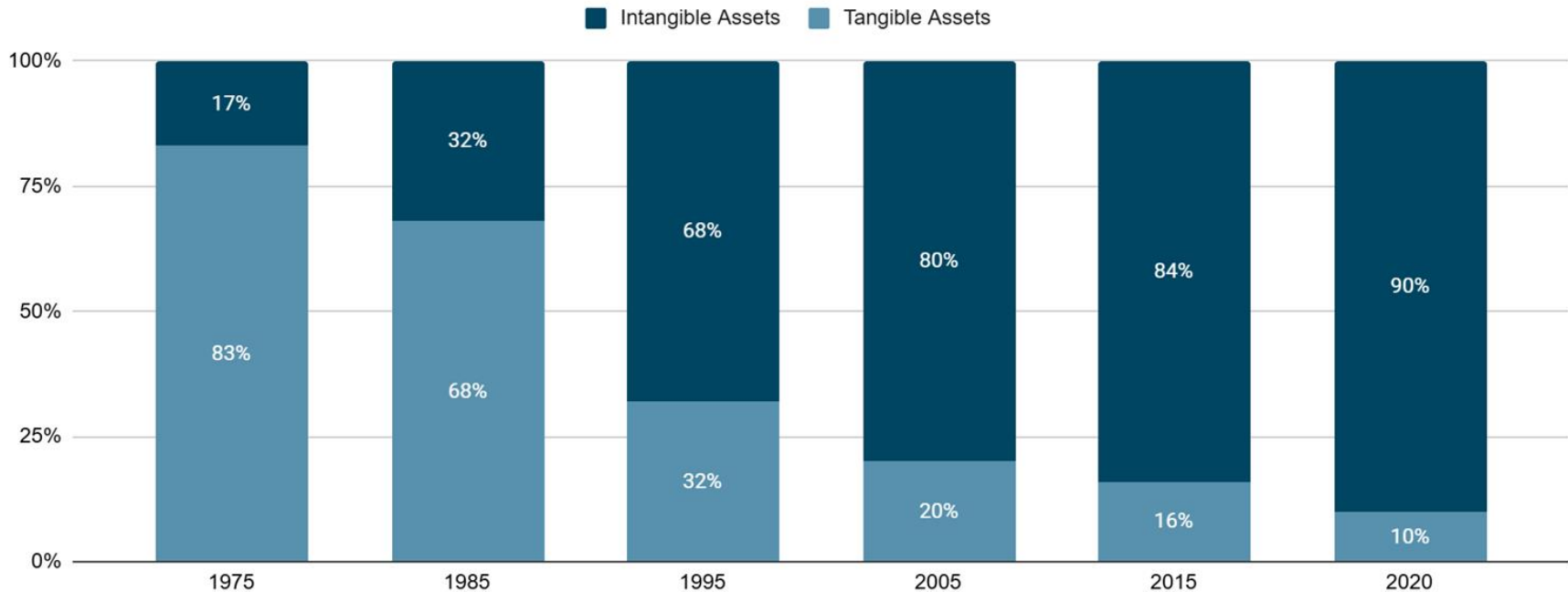


Image created by HowGood based on the 4 Pillars of Value Framework attributed to Bear Stearns and adapted to the Sustainability Business Case by Andrew S. Winston.

KEY INSIGHT:

Intangibles accounted for 90% of S&P 500's Total Market Value in 2020, versus only 17% in 1975'.



Source: 'Ocean Tomo Intellectual Capital Equity and IP CloseUp (<https://oceantomo.com/intangible-asset-market-value-study/>)

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Sustainability by design

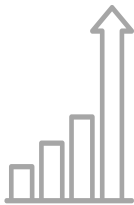
Are sustainability and circularity ready to go mainstream in Consumer Health?

Sofia Sotiropoulou, PhD.
Sr. Director Sustainability & Climate Innovation



Nutraceutical industry is at the intersection of key macro trends

Fueled by global macro trends, the **nutraceutical market is projected to grow 2x in the next 5 years**



Aging and longevity

Weight management and diet

Preventive health management

Personalized, precise health

Sustainability can **secure growth** and **propel brands forward**



Cater to evolving and eco-conscious consumer needs



Build supply chain resilience with ethical, climate-resilient sourcing



Adopt technologies that embed circularity and drastically reduce waste



Sustainability risks propagate across the value chain causing billions in damages and loss of life



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	 USA	 EU	 Asia	
Sustainability claims: shared focus on natural, plant-based and organic	Top sustainability claims	Natural, non-GMO, organic, and vegetarian/vegan/plant-based	Natural, vegan/vegetarian/plant-based, and organic	Natural, vegetarian, organic, and non-GMO
Growing attention to a diet that is good for the planet (sustainable sourcing, environmentally friendly, carbon neutral)	Growing claims	Can be recycled, sustainable sources, carbon neutral	Environmentally friendly, carbon neutral	Environmentally friendly, regenerative, carbon neutral



Sustainability claims are rising in consumer health, now appearing in about **24% of global sales and with a 6.4% CAGR**

Euromonitor and Capsugel market analysis

Sustainable practices can turn climate risks into growth opportunities



Top claims include **“natural,” “vegan/vegetarian,” “organic,”** and **“no GMO”**

Top claims by value sales, 2024, USD Billion



“Carbon neutral – Reduced” is growing the most

Fastest growing claims by value sales, CAGR 2024-25



8 out of 10 brands use sustainability to drive brand differentiation and signal trust

Euromonitor and Capsugel market analysis

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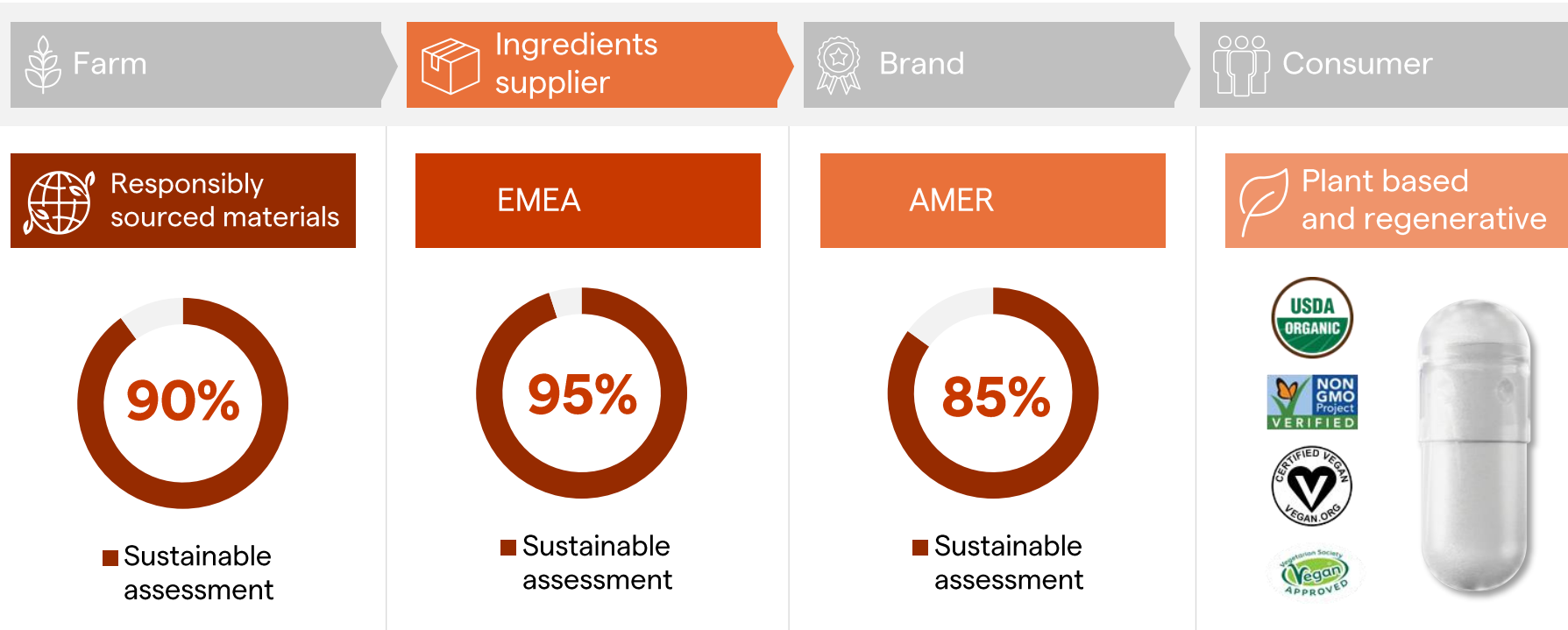


A.I. segmentation
and signal
monitoring of brand
leaders versus
laggards



1. Euromonitor Sustainability : Analysis 2020-2024.
2. NextQuarter Capsugel analysis ESG segmentation 2026.

Capsugel is incorporating sustainable practices: Ethically sourced



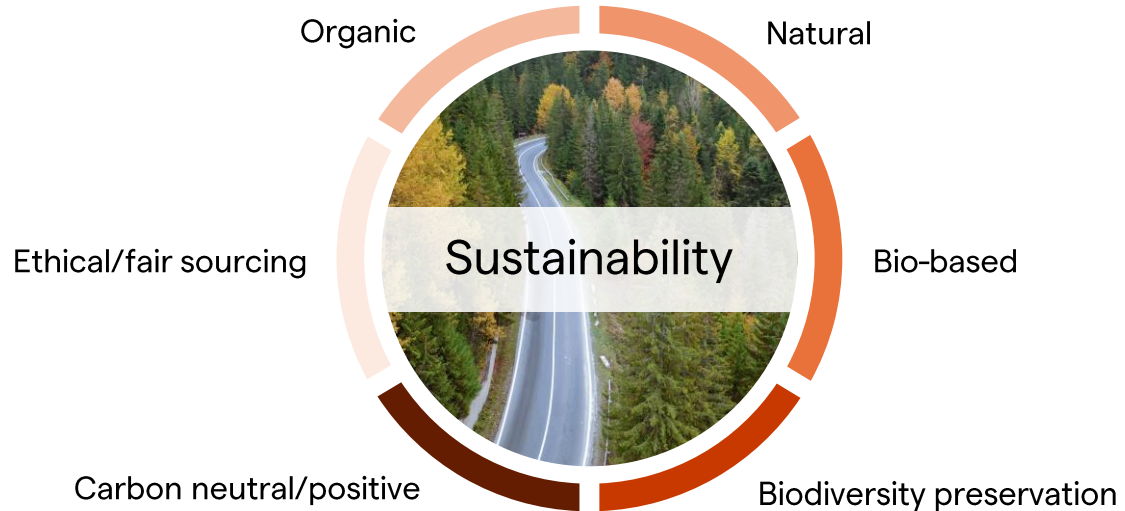
1. Data for Direct procurement. Spend based, Capsugel EMEA, 2025 reporting. Sustainable sourcing. Region indicates supplier HQ.

Sustainable practices can turn climate risks into growth opportunities



Regenerative agriculture enforces a resilient supply chain, enabling better quality products.

Key challenge to adoption:
supply chain availability



The business case for sustainability

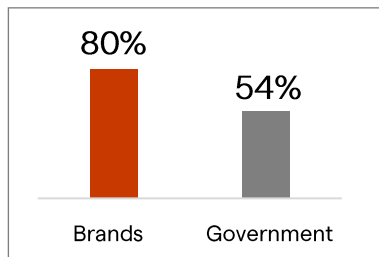
How sustainability drives growth

Brands have **consumer trust**

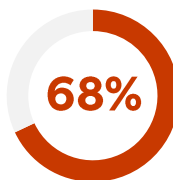


15,000+ respondents from
15 different countries say:

**they trust brands to do what
is right** over their institutions.



Trust = **purchasing power**

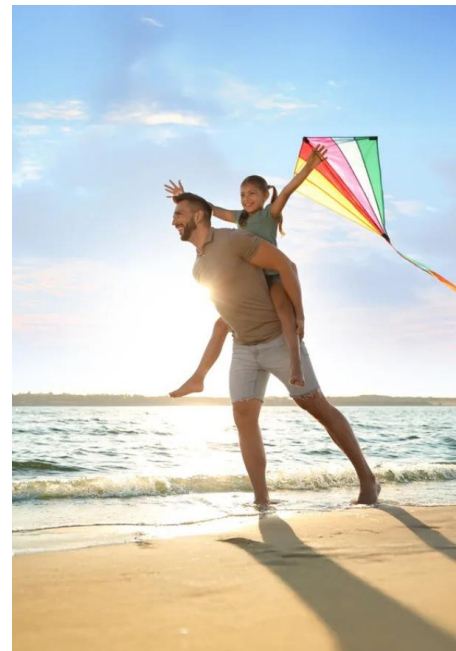


68% of companies will
be doing **more business**
with sustainable
suppliers by 2028:

1. Quality
2. **Sustainability of offering**
3. Price
4. Service levels
5. Sustainability of operations



Trust is a competitive advantage
– and **sustainability drives trust.**





We're building a future in **sustainable nutraceutical development**

Making a positive difference through
our Center of Applied Sustainability

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Join us in building a sustainable future.



Contact us for
more information

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