



THE SUSTAINABLE JOURNEY OF RETAILER BRANDS

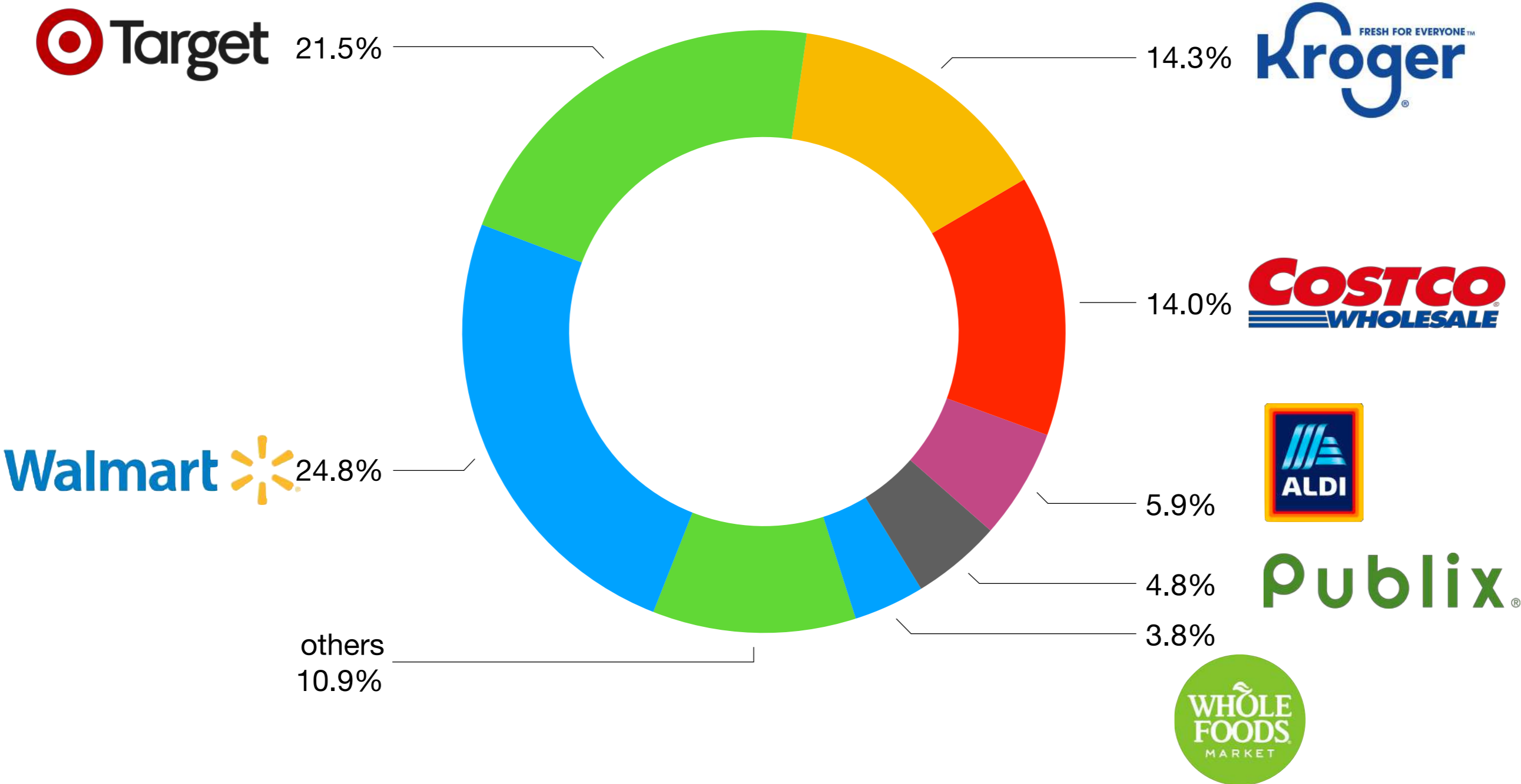
THE DUTCH CASE

THE UNITED STATES CASE

PAOLO PALOMBA

THE FRENCH CASE

Retailers market share - United States



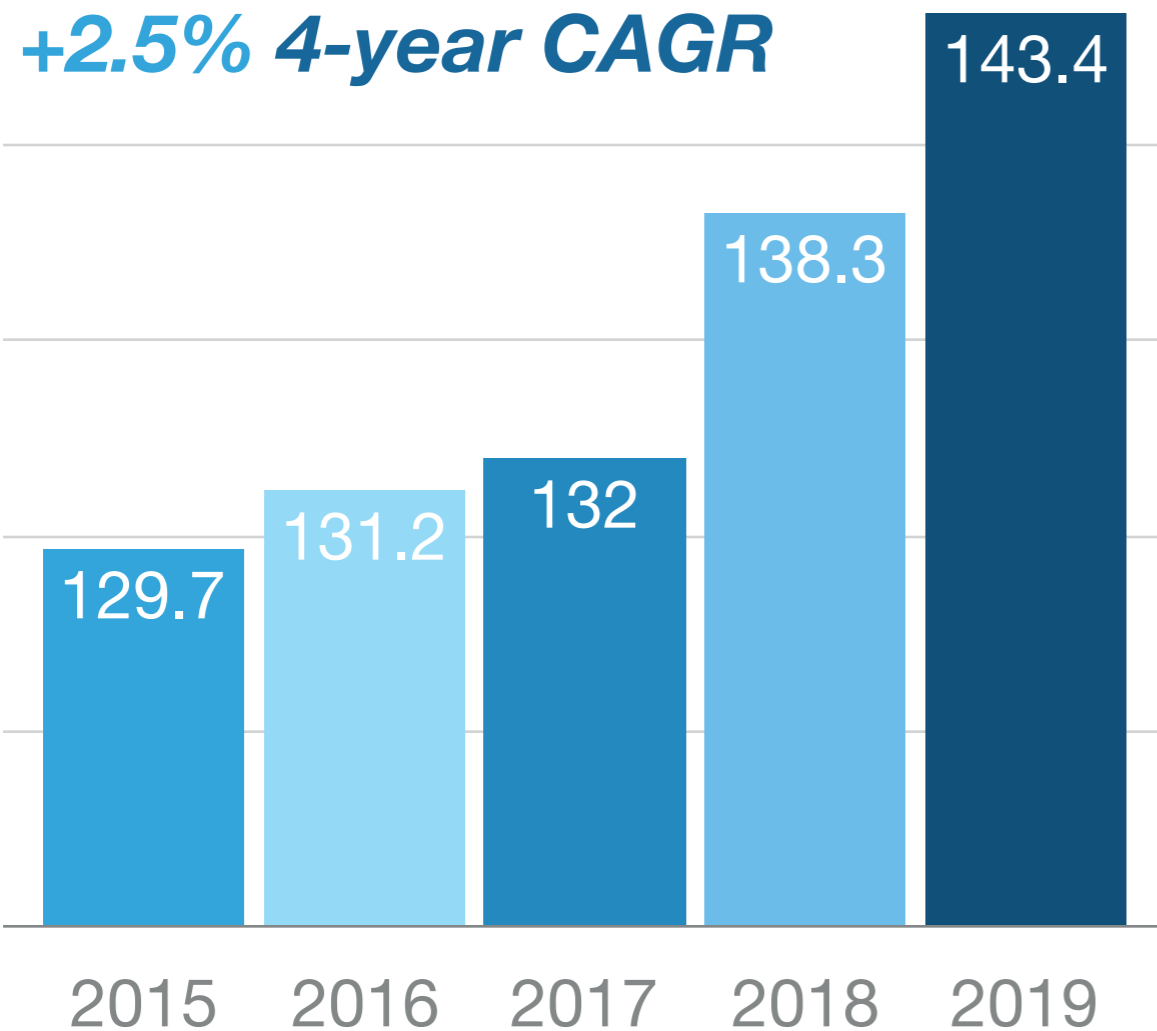
Source: Market Share of interaction, Us retail 2018

Evolution of Private Label Value vs National Brands

Private Label

+3.7% vs. year-ago

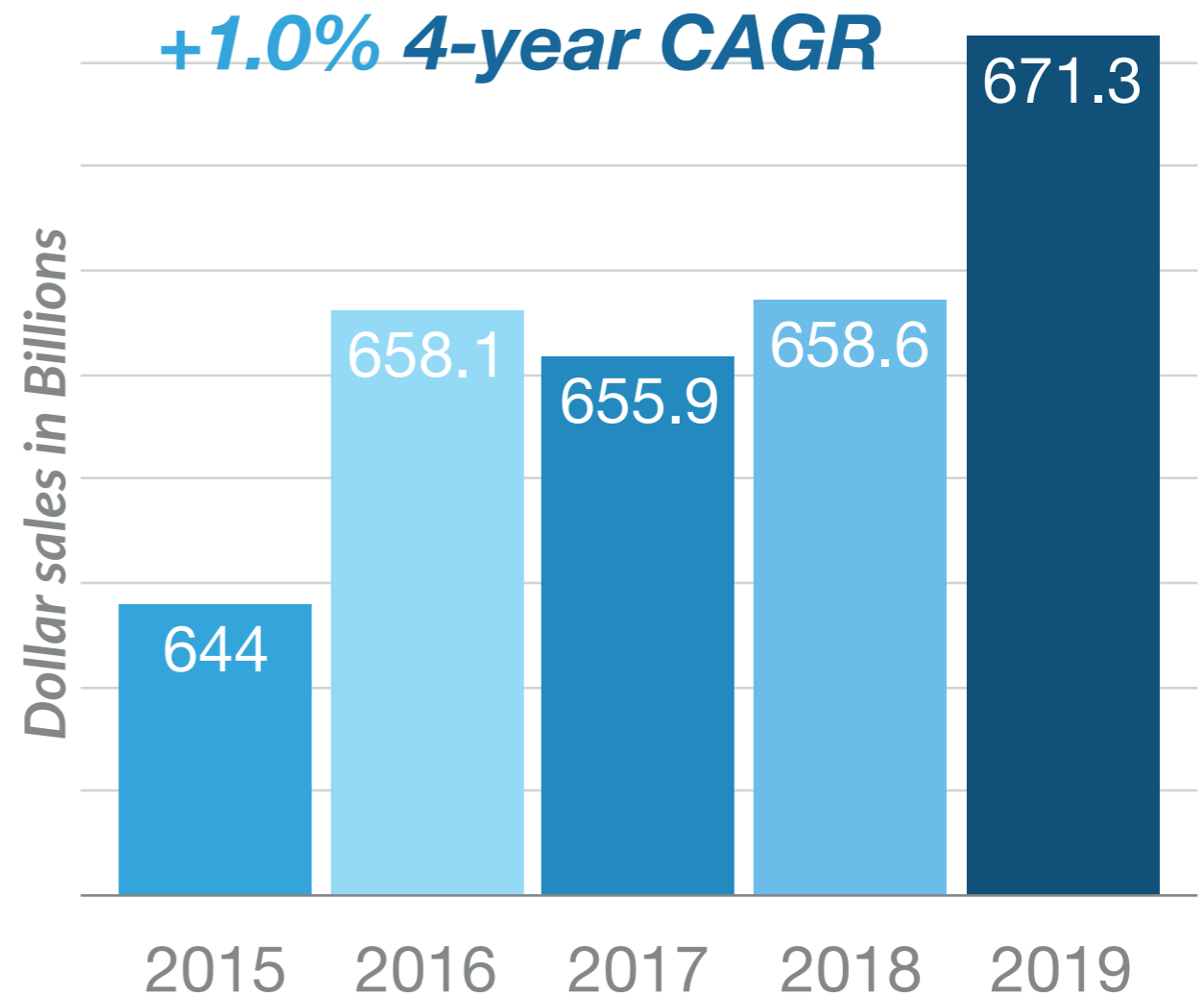
+2.5% 4-year CAGR



Branded

+1.9% vs. year-ago

+1.0% 4-year CAGR



Source: Nielsen Retailer Measurement Services, Total US, 52 weeks ending May25 2019

The US retail plastic scorecard

- ▶ The Scoring Criteria: Policy / Reduction / Innovation & Initiative / Transparency



Source: Greenpeace report 2019

Identity card of Walmart

- ▶ Retail revenue: 500.343 M USD
- ▶ Retail revenue growth: 3%
- ▶ Net Profit Margin: 2,1%
- ▶ Countries of operation: 29
- ▶ Revenue from foreign operation: 23.9%

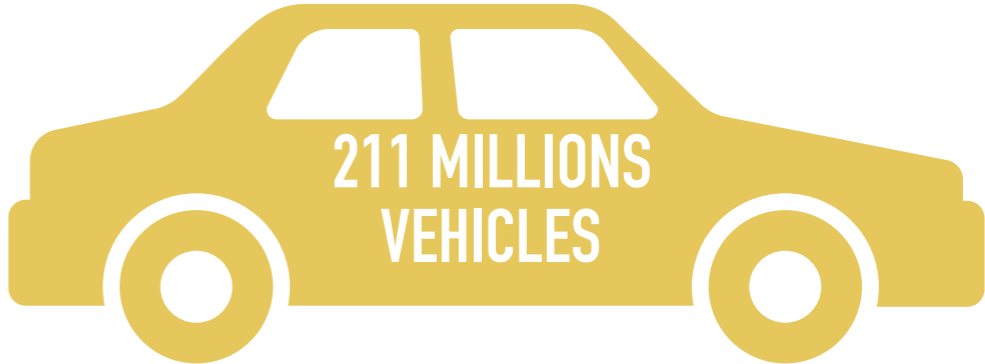


Walmart Sustainability Hub - Project Gigaton



1
GIGA TON
GREENHOUSE
GASES FROM VALUE CHAIN
BY 2030

=



Their sustainability project



ProjectGigaton™

SIX PILLARS OF THE PROGRAM



Energy

- Renewable Energy
- Energy Efficiency
- Fleet Efficiency



Agriculture

- Fertilizer Optimization
- Animal Agriculture



Waste

- Food and Solid Waste Reduction



Packaging

- Recycled Content
- Recyclability
- Optimization



Product Use

- More Energy Efficient Products
- Low-GWP Refrigerants



Forests

- Avoid Deforestation
- Restoration

Strategic Contributors:





ProjectGigaton™

walmartsustainabilityhub.com





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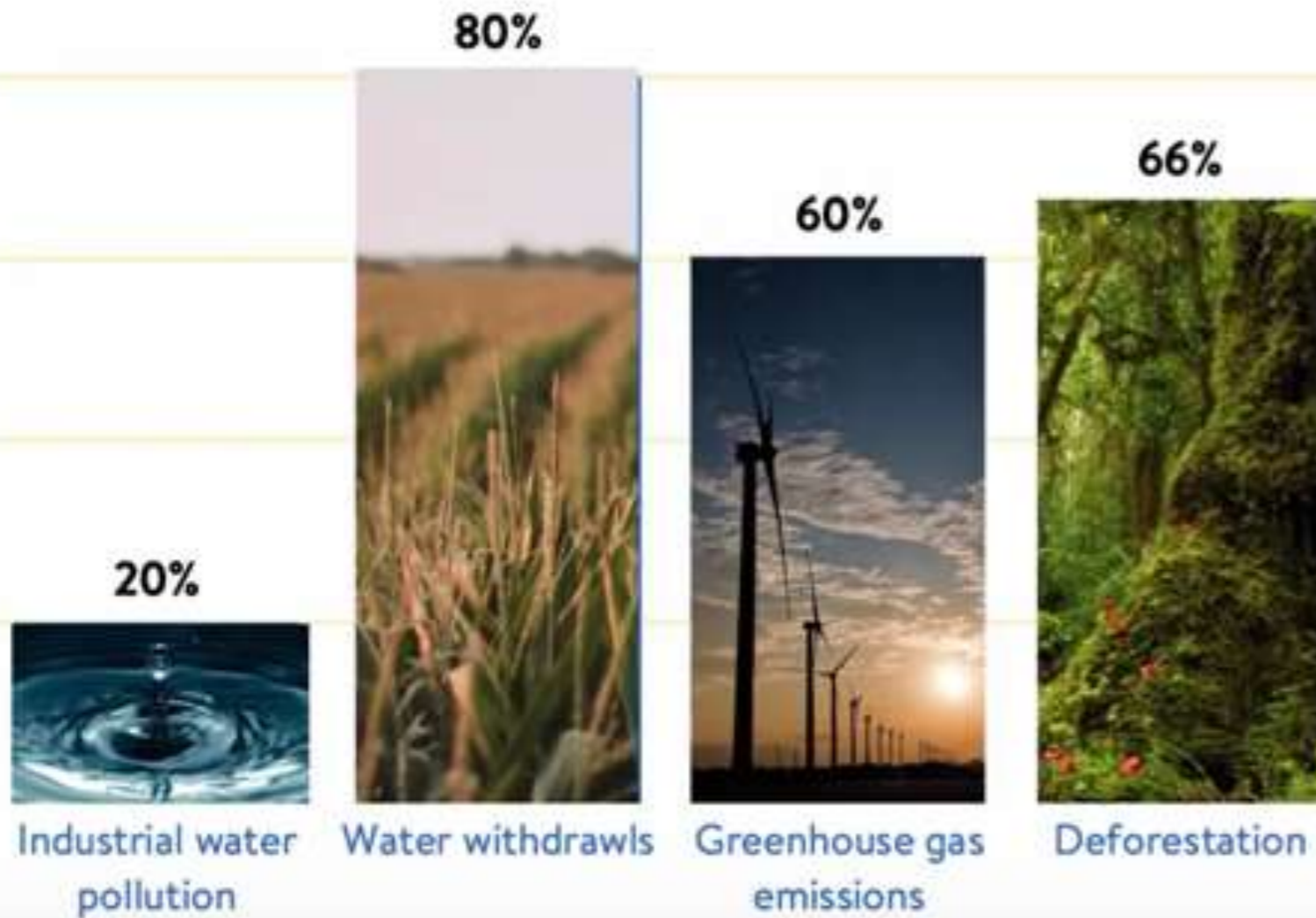


YEARLY SUSTAINABILITY SUMMIT TO STATE THE
ADVANCEMENT TOWARDS THE GLOBAL GOAL AND
RECOGNIZE COMPANIES AND MILESTONE ACHIEVED

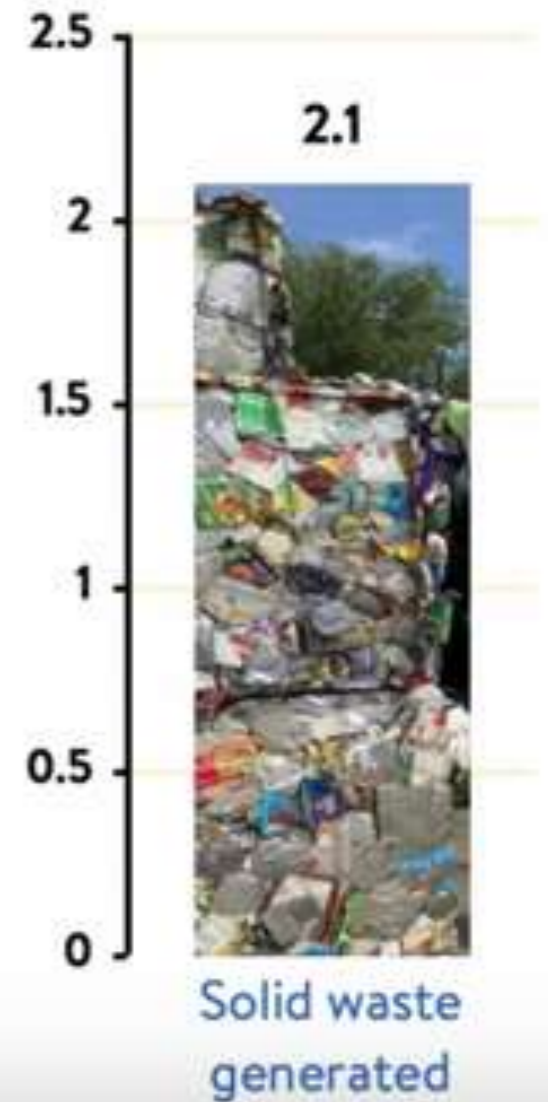


Awareness: Environmental Sustainability

Percentage of global total caused by consumer products, 2015

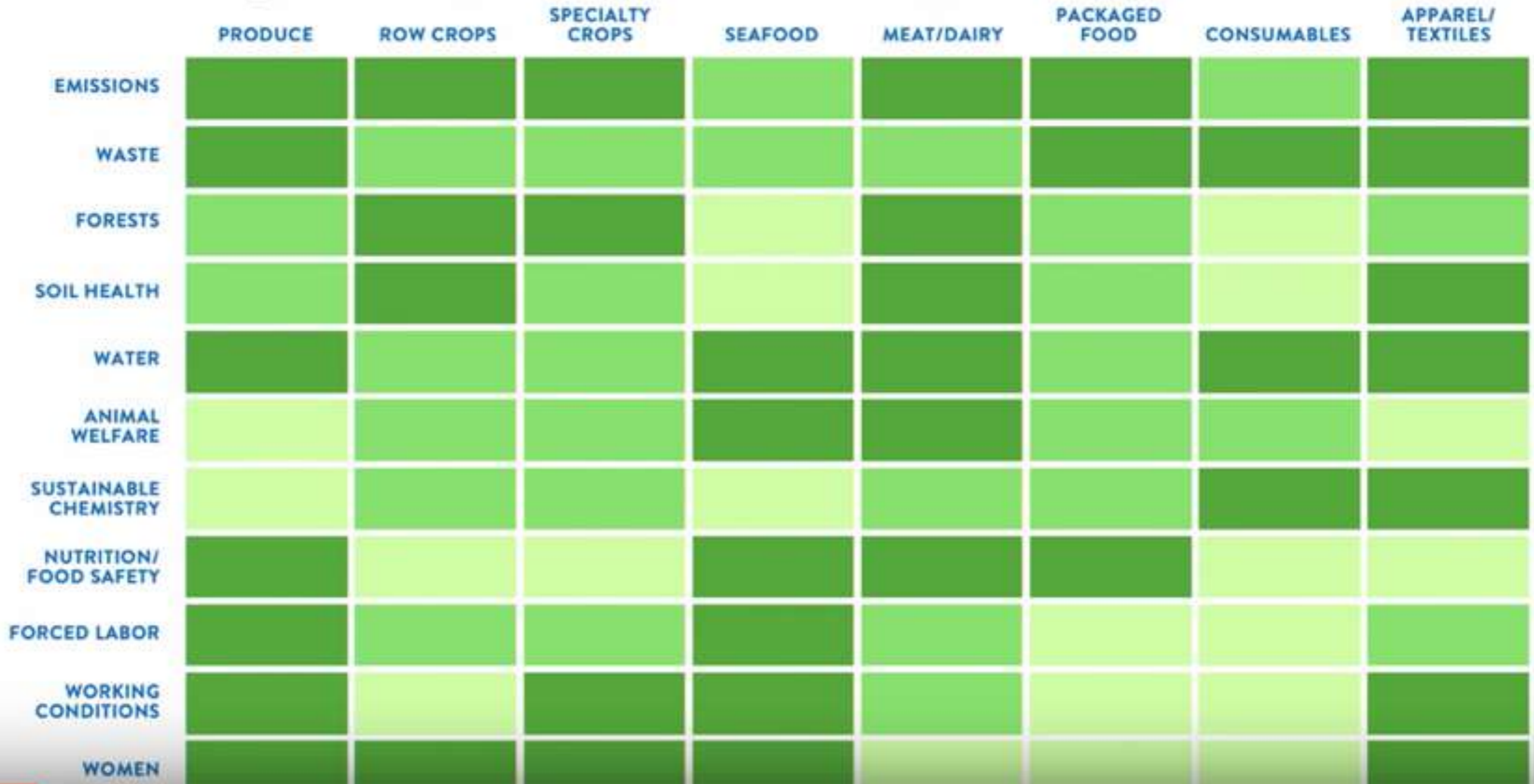


Waste, 2025
Billions of pounds



Priority mapping

Sustainable products: social and environmental priorities



THE WALMART CASE : PROJECT GIGATON

Faster together

The graphic displays a wide array of brand logos organized into several key sustainability categories:

- ENERGY** (vertical green text): Includes logos for PVI, Spectrum, and others.
- SUSTAINABLE AG** (horizontal green text): Includes logos for Wrangler, GAMBOL, Pepsico, and others.
- FORESTS** (vertical blue text): Includes logos for Maple Leaf, L'Oréal USA, and others.
- Responsible sourcing** (horizontal orange text): Includes logos for Kimberly-Clark, The Coca-Cola Company, and others.
- SUSTAINABLE SEAFOOD** (horizontal blue text): Includes logos for Henkel, Arden, and others.
- PACKAGING** (horizontal blue text): Includes logos for TCP, PPG, and others.
- WASTE** (vertical green text): Includes logos for gsk, Smithfield, and others.
- Transparency** (vertical yellow text): Includes logos for Indo Count, PPG, and others.
- PRODUCTS** (horizontal yellow text): Includes logos for Dole, Cargill, and others.
- Environment** (horizontal orange text): Includes logos for Microsoft, SHAHI, and others.
- Safer and healthier products** (horizontal blue text): Includes logos for ASR, Cargill, and others.

The platform (hub) and tools

Calculate your emissions



The objectives, the award



Walmart
ZERO PLASTIC WASTE

Sustainable Private Brand Packaging Goals

- 20% Recycled content in our plastic packaging
- 100% Recyclable, Reusable, or Industrially Compostable packaging
- 100% Packaging labeled for recyclability



Giga-Gurus

Transparency, Information, Label : “How2Recycle®”



Food



Consumables



General Merchandise

JOIN US AND LEARN MORE AT: [MEMBERS.HOW2RECYCLE.INFO](https://members.how2recycle.info)

Transparency, Information, Label



INFORMING OUR MEMBERS



Project and approach coherent with values





“ There is virtually no distinction between being a responsible citizen and a successful business “

Lee Scott , 2005

THE WALMART CASE : PROJECT GIGATON



«It's not enough to just serve one stakeholder group, the opportunity for business and their leadership is to add value for all stakeholders. Throughout Walmart's history, we have understood that for a business to last, it must have a fundamental reason for being, which is found in the value it creates for all – customers, associates, communities, shareholders, suppliers, future generations, and the planet.»

Doug McMillon, CEO Walmart