ESTONIA

OFFICIAL REPORT 2021

Europe's Largest Brand Study on Sustainability

SUSTAINABLE BRAND INDEX B2C

ABOUT THE REPORT

This report was written by SB Insight AB. SB Insight is an insight agency based in Stockholm, Sweden and the founder of Sustainable Brand Index™.

SUSTAINABLE BRAND INDEX™

Sustainable Brand Index™ is Europe's largest independent brand study on sustainability, founded in 2011 by SB Insight in Sweden. Sustainable Brand Index™ measures the sustainability perception of brands across industries and countries. It is an independent study consisting of more than 1 400 brands, 35 industries, and over 60 000 consumer-interviews across Europe (the Nordics, the Netherlands & the Baltics). In doing so, Sustainable Brand Index™ shows how brands are perceived within sustainability, why they are perceived this way, and what to do about it. Next to yearly brand rankings and official reports , Sustainable Brand Index™ provides brands with data-driven sustainability insights, tailored analysis and strategic recommendations.

SB INSIGHT

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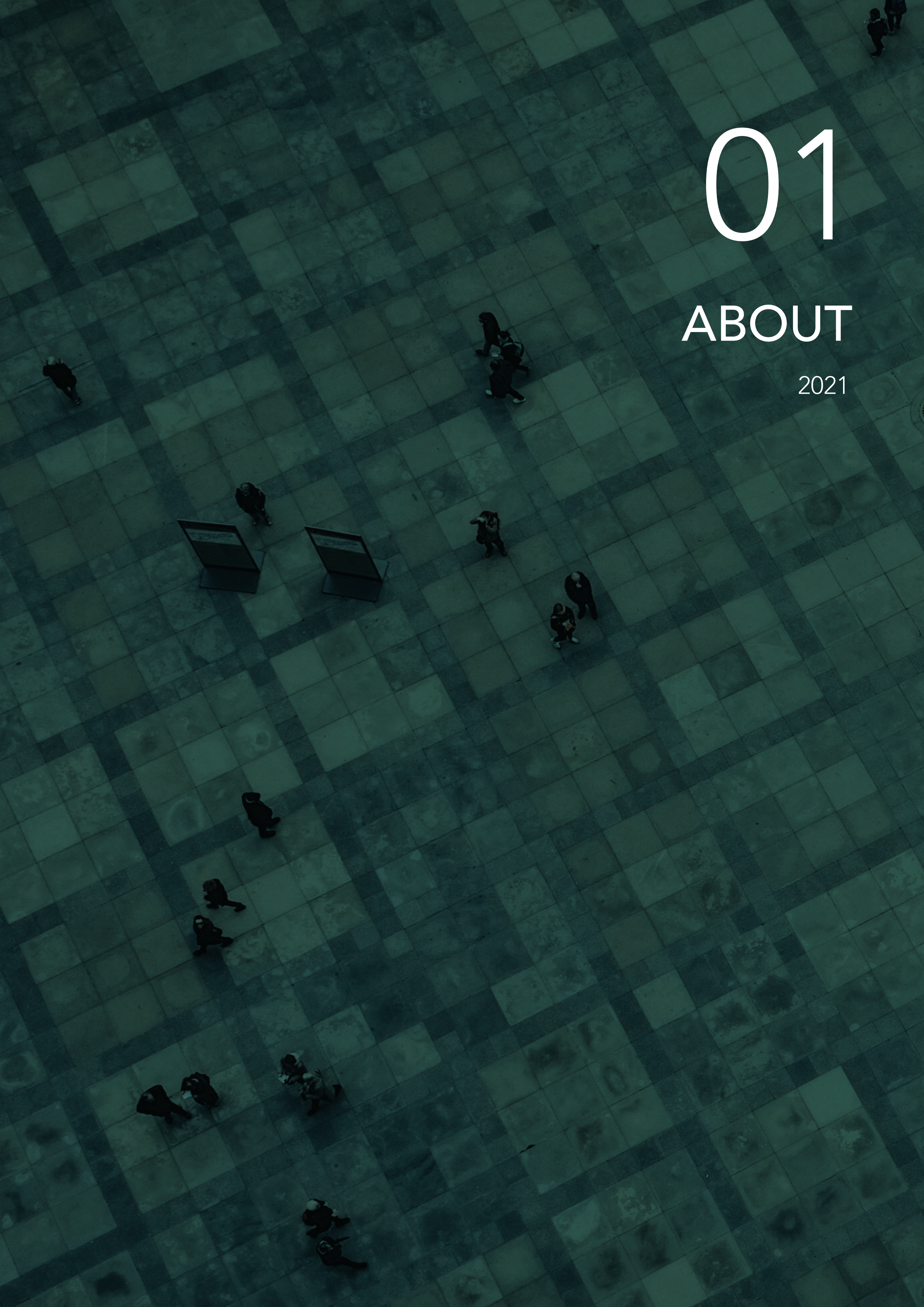
ABOUT

2021



Europe's largest brand study on sustainability

WHO WE ARE

Sustainable Brand Index™ is Europe's largest independent brand study on sustainability, founded in 2011 by SB Insight in Sweden. Sustainable Brand Index™ measures the sustainability perception of brands across industries and countries. It is an independent study consisting of more than 1 400 brands, 35 industries, and over 60 000 consumer-interviews across Europe (the Nordics, the Netherlands & the Baltics). In doing so, Sustainable Brand Index™ shows how brands are perceived within sustainability, why they are perceived this way, and what to do about it. Next to yearly brand rankings and official reports , Sustainable Brand Index™ provides brands with data-driven sustainability insights, tailored analysis and strategic recommendations.

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61 960
Consumers

1 436
Brands

34
Industries

8
Countries

Based on macro and micro trends, consumer behaviours, and brand analysis, the study seeks answers to the following questions:

- How does sustainability affect brands?
- How are brands perceived within the different areas of sustainability and why?
- What can brands do to change and improve this perception?
- What are the consumer's attitudes and behaviours regarding sustainability, how do they change over time, and how do they affect brands?
- Which future trends and developments within sustainability do brands need to be aware of and respond to?

What we do

RANKINGS

Our yearly rankings show how brands are perceived on sustainability by their important stakeholders. Brands are selected independently based on market share, turnover and general brand awareness.

OFFICIAL REPORTS

Our official reports contains the complete ranking of each country over time, accompanied with key sustainability insights and stakeholder data.

> ***The Sustainable Brand Index™ team provides us with sound insights and holistic analyses. They are well informed on sustainability issues. Our report brings value to our strategic planning and communications.***

CHRISTINA GUSTAFSSON
NORDIC CONSUMER
& BUSINESS INSIGHTS MANAGER,
MCDONALD'S

LEARN MORE

TAILORED INSIGHTS & ANALYSIS

We provide brands with brand-specific data insights, a tailored analysis and strategic tools. Our unique data and sustainability insights help brands understand how they are perceived within sustainability, why they are perceived this way and how to build a more sustainable brand. Yearly, we provide brands internationally with tailored sustainability insights that help them in their goal setting and strategic work, as well as external and internal communication.

Our purpose

The purpose of Sustainable Brand Index™ is to drive the agenda, visualise the value of sustainable branding and increase the knowledge on sustainability within branding and communication. Based on data-driven insights, Sustainable Brand Index™ is able to identify important gaps between how brands think they are perceived on sustainability and the reality. By analysing important trends, mapping stakeholders' attitudes and behaviours and evaluating several materiality areas, the study provides brand-specific data and strategic tools.

In doing so, Sustainable Brand Index™ encourages brands to improve their work and dares them to communicate about sustainability. The more brands talk about sustainability, the more consumers will know, care and demand. It creates a positive cycle for transparency and sustainability. Together we are on a mission to create sustainable brands.

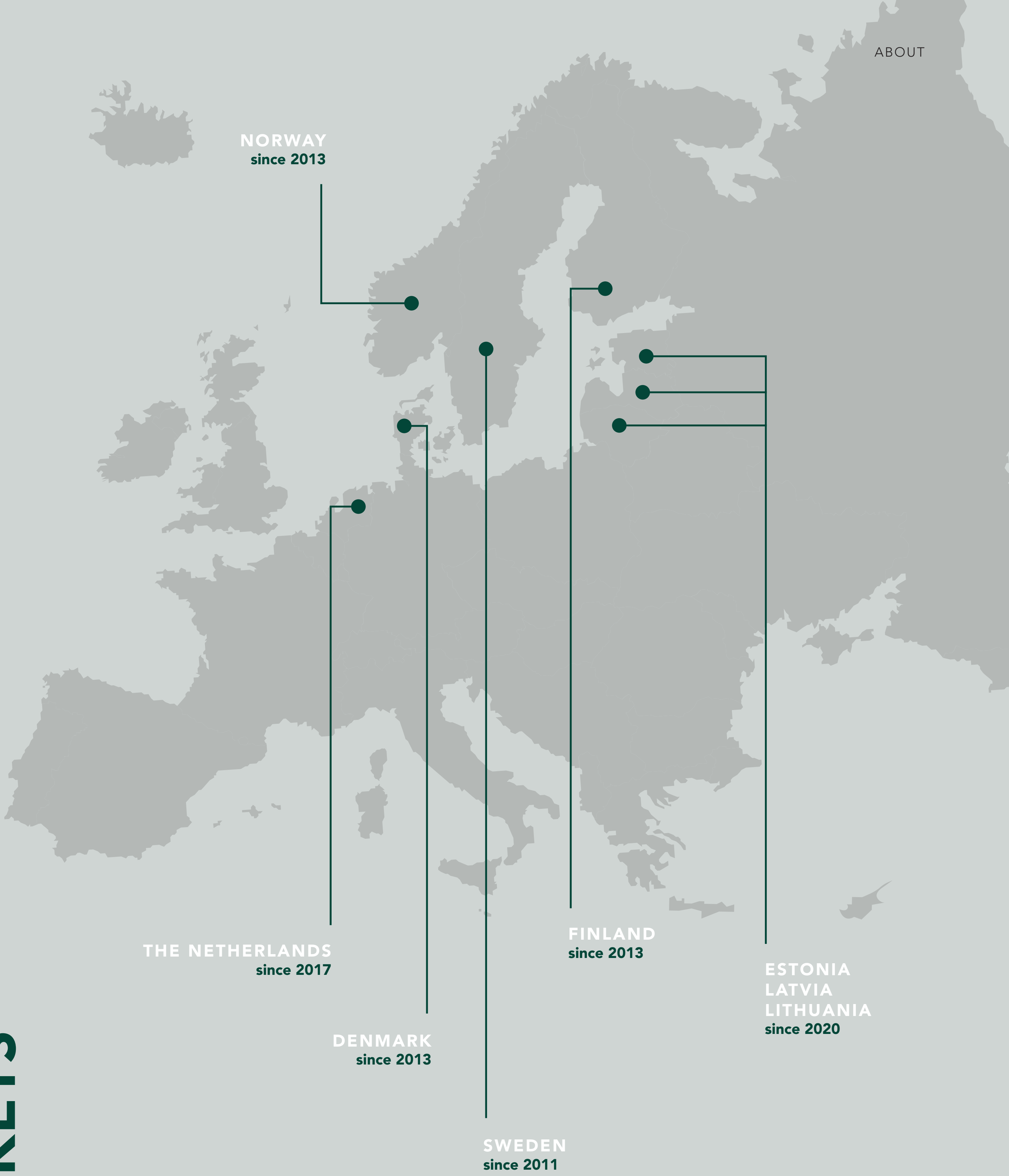
PERCEPTION VS. PERFORMANCE

It is important to note that Sustainable Brand Index™ measures how brands are perceived on sustainability. Thus, we do not measure the actual level of sustainability operations in this study. The perception of each actor's sustainability efforts is largely based on the consumers' gut feeling, but in some cases also on their knowledge. In summary, we measure how much or how little the consumers know about each actor's sustainability responsibility as well as how they value each actor's sustainability responsibility.

"Sustainable Brand Index™ has been an early "unifying force" on the market and has played an important role in demonstrating how sustainability can strengthen a brand and be linked to the commercial agenda.

JONAS CARLEHED
SUSTAINABILITY MANAGER
IKEA SWEDEN

OUR MARKETS


NORWAY
since 2013
THE NETHERLANDS
since 2017
DENMARK
since 2013
SWEDEN
since 2011
FINLAND
since 2013
ESTONIA
LATVIA
LITHUANIA
since 2020

Data collection

Sustainable Brand Index™ B2C is an independent three-part study, based on desk research and two quantitative web-surveys among the target audience.

TARGET AUDIENCE & RESPONDENTS

The target audience in Sustainable Brand Index™ B2C is the general consumer or public, 16-75 years, in each country.

- In accordance with our policy, we do not use panels that are self-recruited. The respondents come from so-called consumer panels belonging to a subcontractor. The panels thus consist of regular citizens in each country that have been recruited to answer questions at even and uneven intervals.
- In the surveys, we set quotas for gender, age and geography.
- The data is weighted for further fine-tuning.
- The average length of the surveys is approximately 10 minutes. On average every respondent evaluates a random selection of around 20 brands.
- The study has been conducted during November 2020 to February 2021.

BRAND SELECTION

Per country, brands are selected yearly across a variety of industries, based on a set of independent parameters. Parameters include: market share on the respective market, turnover and general brand awareness. The purpose of these criteria is to create a selection that mirrors the brands that consumers meet in their everyday life. In the Estonian, Latvian and Lithuanian study of Sustainable Brand Index™, every brand is evaluated by at least 800 people.

Brands cannot choose to be included or excluded from the study and the annual results of Sustainable Brand Index™ are open to the public.

DEFINITION OF SUSTAINABILITY

The definition of sustainability in Sustainable Brand Index™ is based on the UN Global Goals for Sustainable Development (SDG). The ranking of Sustainable Brand Index™ is however only the tip of the iceberg in the study. We measure consumer perception in relation to sustainability in different ways, by diving deeper into specific attitudes, knowledge levels, behaviours and materiality areas relevant to each industry.

THE RANKING SCORE

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers in the respective country. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know". The maximum score a brand can get is 200%. A brand that has 200%, performs very well within both environmental (100%) and social responsibility (100%) according to consumers. In other words, this means that 100% of consumers have answered 4 or 5. A brand with a 200% score usually does not exist in reality.

FOUNDED BY SB INSIGHT

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TO LEARN MORE ABOUT SB INSIGHT

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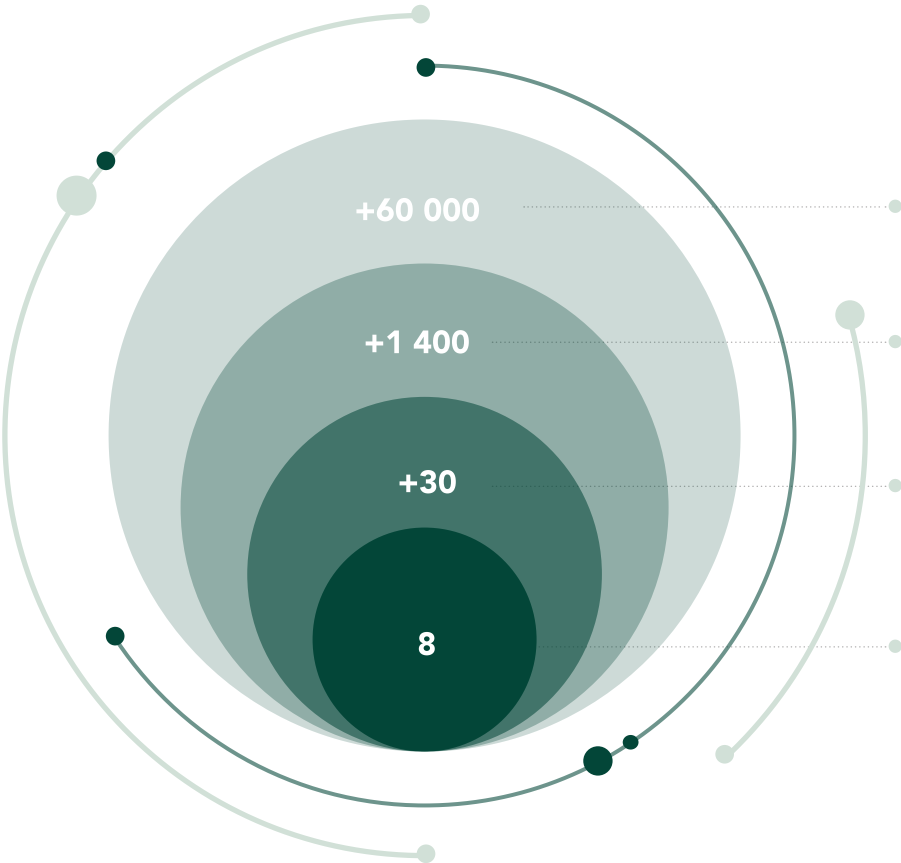
Facts & figures 2021



BREAKDOWN PER COUNTRY

COUNTRIES	CONSUMERS	BRANDS	INDUSTRIES
Sweden	23 400	390	34
Norway	10 460	254	24
Denmark	6 800	233	24
Finland	9 900	212	25
The Netherlands	9 000	199	17
Estonia	800	50	8
Latvia	800	51	8
Lithuania	800	50	8
TOTAL	**61 960**	**1436**	**+34**

Industries 2021

SWEDEN

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- Digital
- E-commerce
- Electricity & Heating
- Food
- Forest Owners
- Fuel
- Furniture & Decoration - Brands
- Furniture & Decoration - Stores
- Gambling
- Governmental Institutions
- Grocery Stores
- Healthcare Providers
- Hobby & Leisure
- Home appliances & Consumer electronics
- Hotels
- Insurance
- Opticians
- Parcels & Logistics
- Pension
- Pharmacies
- Real Estate
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism
- Vehicle Inspection

NUMBER OF INDUSTRIES

34

NORWAY

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration
- Grocery Stores
- Hobby & Leisure
- Home appliances & Consumer electronics
- Hotels
- Insurance & Pension
- Parcels & Logistics
- Pharmacies
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

24

DENMARK

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration - Brands
- Furniture & Decoration - Stores
- Hobby & Leisure
- Home appliances & Consumer electronics
- Hotels
- Insurance & Pension
- Pharmacies
- Restaurants, Cafes & Take-away
- Supermarkets
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

24

FINLAND

- Airlines
- Automotive
- Banks
- Beauty
- Beverage
- Clothes & Fashion - Brands
- Clothes & Fashion - Stores
- Consumer Goods Corporations
- E-commerce
- Electricity & Heating
- Food
- Fuel
- Furniture & Decoration - Brands
- Furniture & Decoration - Stores
- Grocery Stores
- Hobby & Leisure
- Home appliances & Consumer electronics
- Hotels
- Insurance & Pension
- Parcels & Logistics
- Pharmacies
- Restaurants, Cafes & Take-away
- Telecommunications
- Transport
- Travel & Tourism

NUMBER OF INDUSTRIES

25

THE NETHERLANDS

- Airlines
- Automotive
- Banks
- Beverage
- Consumer Goods Corporations
- Digital
- E-commerce
- Energy
- Food
- Hotels
- Insurance
- Mobility
- Restaurants, Cafes & Take-away
- Retail
- Supermarkets
- Telecom
- Travel & Tourism

NUMBER OF INDUSTRIES

17

ESTONIA
LATVIA
LITHUANIA

- Banks
- Electricity & Heating
- Food & Beverage
- Fuel
- Grocery Stores
- Pharmacies
- Telecom
- Transport/Travel

NUMBER OF INDUSTRIES

8

02

KEY INSIGHTS

2021

Estonia

Latvia

Lithuania

SUSTAINABLE BRAND INDEX B2B

IN A DATA-DRIVEN WAY, SUSTAINABLE BRAND INDEX™ IS ABLE TO IDENTIFY IMPORTANT GAPS BETWEEN HOW BRANDS THINK THEY ARE PERCEIVED AND THE REALITY.

BY ANALYSING IMPORTANT TRENDS, MAPPING STAKEHOLDER'S ATTITUDES AND BEHAVIOURS AND EVALUATING BRAND DRIVERS, THE STUDY PROVIDES IN-DEPTH INSIGHTS AND STRATEGIC TOOLS.

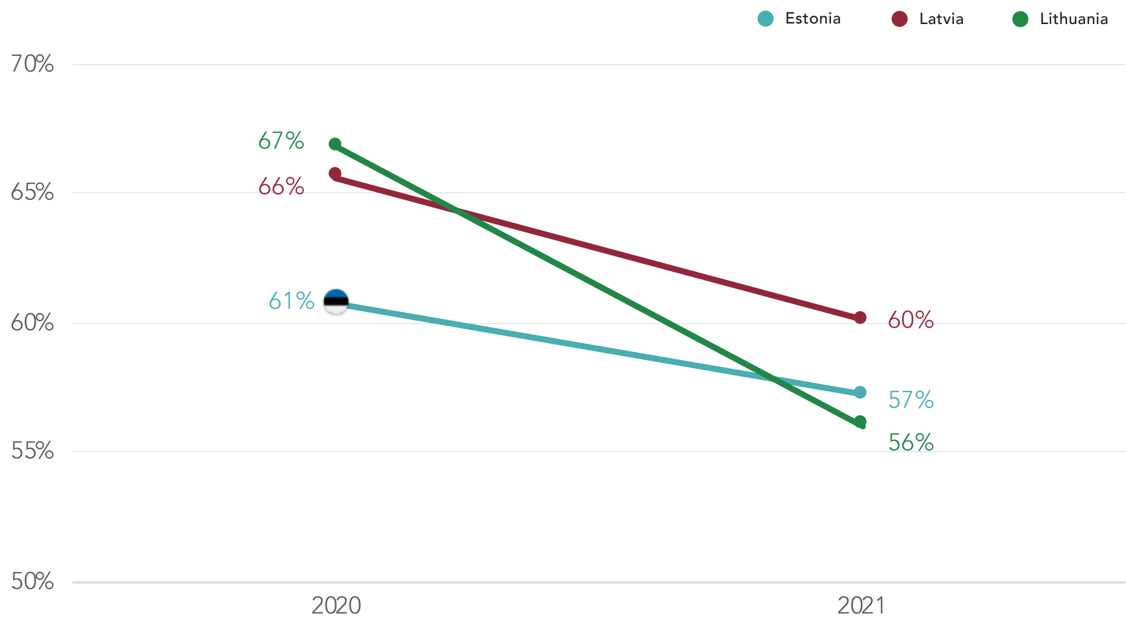
The Baltic region finds itself in a transition phase, as awareness around social and environmental challenges is growing over these last years . Whereas, responisble behaviour of companies has for a long time been related to mainly social issues and fair business practices, we now see that the understanding of what sustainability means is evolving. What was a vague and intangible concept a few years ago is now starting to be understood by companies, as well as Estonian, Latvian and Lithuanian consumers.

2020 – A tumultuous year.

The way we think and talk about sustainability is however extremely multifarious. Our discussions and our actions in both our public and private lives are strongly influenced by contexual factors, political debates and global events. The year 2020 has in that context also had a significant impact on people. It will go into the historic books as a tumultuous one, dominated by the covid-pandemic as well as political and human rights issues. The world has been shaken, stirred, and woken up to some harsh realities. Next to an ongoing climate crisis, new health and social issues have dominated the debate, with an increased focus on the responsibility of governments, companies and individuals, in times of crisis and social injustice. We have entered a global health pandemic that is having wide-spread implications for our economy, societies, businesses, and most likely also the way we interact for a long time.

So, how does this affect the sustainability landscape according to Sustainable Brand Index in the Baltics?

% OF CONSUMERS WHO DISCUSS SUSTAINABILITY WITH FRIENDS & FAMILY (SOMETIMES + OFTEN)



In 2021, the marjority of Baltic consumers (56 - 60%) are discussing sustainability with friends and family on a regular basis, ranging from sometimes to very often. When we look at the development from 2020 to 2021, we can however see a slight decrease. Especially in Lithuania, the data shows a drop from 67% to 56% of the population discussing sustainability regularly. This decrease in discussions around sustainability over the last year is something we see in all countries that are measured within Sustainable Brand Index™. It is not completely unexpected and with that an immediate worry.

The fact that less consumers are discussing sustainability issues in their personal and work lives compared to the year before, is not surprising. It can be explained by a variety of reasons. Over time, we see that political debates and global developments have a big impact on our media feeds and with that on our day-to-day attention. The current covid-pandemic that came to light in the beginning of 2020, has in a similar way occupied people's minds and conversations. Adding the fact that we are, as a consequence, spending more time at home and social distancing, it is not surprising that we see this negative trend.

Does less talk, however mean that consumers are also less interested in sustainability, because of the pandemic?

> *The majority of consumers discuss sustainability on a regular basis, despite a negative trend from 2020-2021.*

Understanding the multifacetedness of sustainability and what influences us.

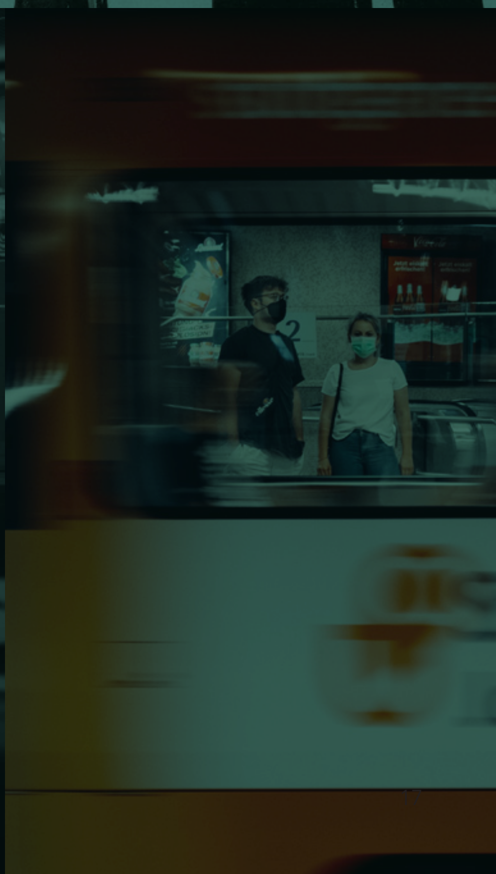
As said, the way we think and talk about sustainability is extremely multifarious. Our discussions in both our public and private lives are first of all dominated by market developments, political debates and global events. As our (social) media feeds and streaming queues are fighting for our attention, so do our day-to-day conversations around sustainability issues with family, friends and colleagues change. We are for a large part influenced by our context, like where we live, work and decide to get our information. On the other hand, our interest and engagement in sustainability is based on our intrinsic values and motivations. Prioritising sustainability or making a more sustainable choice can therefore be based on a variety of reasons.

56 - 60% of Baltic consumers are discussing sustainability with friends and family on a regular basis.

Do you want to learn more about interest in sustainability? What are the main drivers of sustainable behaviour and and how does this look for different demographic groups? By interviewing over 60 000 European consumers on sustainability, we have extensive data on interest and engagement around sustainability issues. Let us help you understand your customer better.

CLICK HERE


IF YOU ARE NEUTRAL
IN SITUATIONS OF
INJUSTICE



Less talk, but more interest.

In the beginning of covid-19, initial fears were revolving around the expectation that people would care less about sustainability and focus more on themselves. Quite natural, as survival is our main primitive driver as human beings. However, now in the midst of the pandemic the data actually shows something different.

It is clear that the pandemic has shown regular consumers that our current way of living is neither sustainable nor desirable in the long run. People are starting to understand the impact of a crisis on society and the environment. In 2021, between 23-38% of Baltic consumers state that their interest in sustainability issues has actually increased due to covid-19 and for a large part of people it stayed the same. Especially in Lithuania, consumer interest has gone up relatively the most. In all other countries that are measured within Sustainable Brand Index™ (Sweden, Norway, Denmark, Finland & The Netherlands) we see a similar trend. The data shows that 1/3 of the population in those countries is more interested in sustainability issues as a direct result of the pandemic. So less talk, but more interest overall.

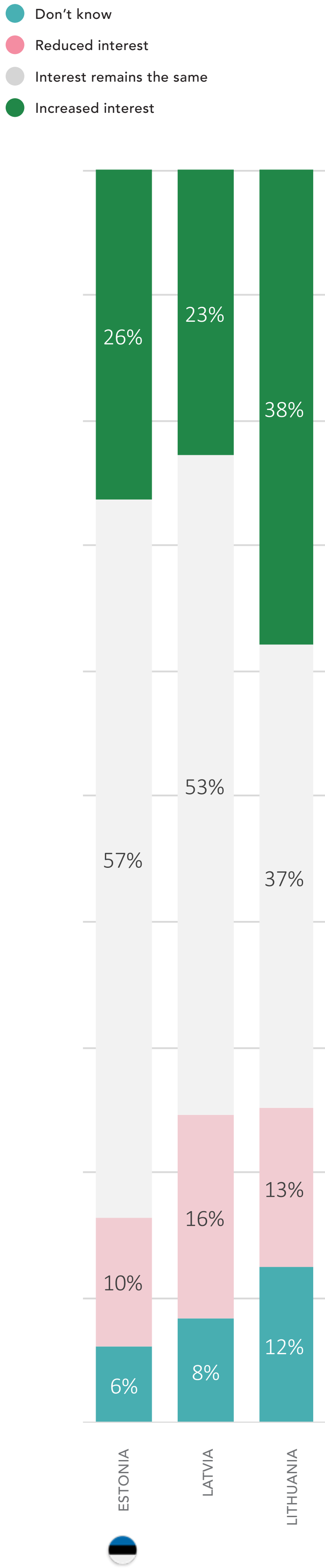
This increase in interest is often related to a better understanding of what the impact of future crisis could be on society and the planet. Those consumers who state their interest has decreased, often referred to being more focused on their economy and health. Others explained it on the short-term assumption that less travel and consumption in times of the pandemic is lowering the need for focusing on sustainability issues right now.

COVID-19 – not a pure sustainability issue.

It might seem slightly contradictory that discussions around sustainability with friends and family have gone down, but actual interest has gone up this year. However, it is not when we think about the fact that the average person has been more isolated and at home this year. It also leads to the conclusion that for some people, the covid pandemic is not a pure sustainability issue. Even though many would argue that handling a pandemic responsibly is sustainability-related, some disagree and see those as separate things.

The data from Sustainable Brand Index™ 2021 shows that even in tough times like these, people still think about climate change, social responsibility and other sustainability issues. The average person might have discussed sustainability less in their day-to-day lives, for different reasons such as seeing other people less, but interest in sustainability issues is actually increasing due to the pandemic. Overall, the level of maturity around sustainability issues keeps growing on the consumer-level.

THE EFFECT OF THE COVID PANDEMIC ON CONSUMERS' INTEREST IN SUSTAINABILITY ISSUES




CRISIS
TUSSAUDS



DON'T GO
BREAKING
MY

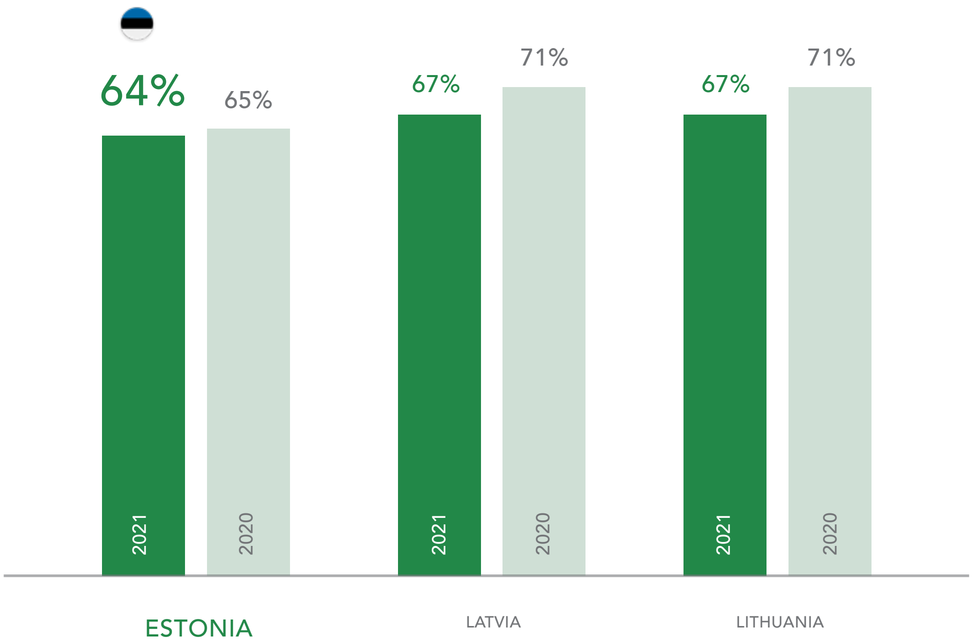
The effect of sustainability on consumer purchasing decisions.

Interest in sustainability is not always directly reflected in the way we behave and make choices in every day life. It is therefore interesting to take a closer look at how sustainability affects purchasing decisions.

AN INDICATOR OVER TIME

This indicator shows the ambition among consumers to consider sustainability when purchasing products or services. It includes all levels of perceived effect, from sustainability being the decisive factor in making a purchasing decision, to it being one of several factors. It is a good indicator over time to see whether or not we are moving into the right direction. In 2020, this indicator was measured for the first time in the Baltic countries and will continue to be measured yearly.

% OF CONSUMER THAT ARE AFFECTED BY SUSTAINABILITY WHEN MAKING A PURCHASING DECISION



Sustainability as an underlying driving force.

Last year, the data shows that the marjority of Baltic consumers (65 - 71%) were affected by sustainability when making a purchase, with the highest levels in Latvia and Lithuania. When we look at the development from 2020 to 2021, this is still the case, but numbers are slightly lower. Consumers might have been slightly less affected by sustainability this year (64-67%), it is too early to consider this a negative trend. When comparing this to the Nordic markets and also the Netherlands, in which this indicator has been measured within Sustainable Brand Index™ for a longer time, we can conclude that the trend is much flatter over time. It indicates that even though interest in and debates around sustainability issues are rising, purchasing decisions are not automatically more affected at the same time.

First, those consumers that are actively interested in sustainability do still experience obstacles in making a sustainable choice or choosing a more sustainable alternative. It is not always easy for consumer to understand what the most sustainabile option is or it is not competitice in terms of of offer and price.

Second, consumers define and prioritise sustainabilty in different ways. Sustainability often does not affect every type of purchase or decision in the same way. It is interesting to see that for this indicator, the numbers are actually higher in the Baltic countries compared to the % of consumers that discuss sustainability frequently. It thus seems like sustainability is an underlying factor for some, but not always a direct effect of someone being actively intereted in the environmenta or social impact of a product. It could originate from the fact that certain sustainability-attributes such as quality and longevity are also considered beneficial from a price and economic perspective.

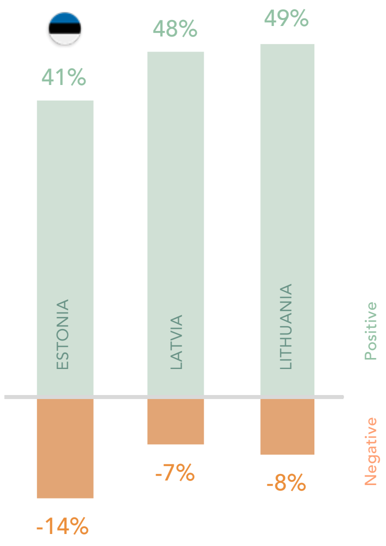
When comparing the Baltic markets, we see that sustainability seems to affect Latvian and Lithuanian consumers the most. Estonia is still lagging a bit behind when it comes to interest and engagement in sustainability.

Sustainability communication from companies.

The data of Sustainable Brand Index™ 2021 shows that between 41-49% of Baltic consumers are positive towards sustainability communication of companies. Between 7-14% is explicitly negative towards companies that are communicating about sustainability. Lithuanian consumers are most positive, whereas Estonians are relatively more sceptical. Overall, this shows that Baltic consumers want companies to engage in these issues and think it's important for companies to communicate about their sustainability work.

However, it is important to be aware of this growing divide between negative and positive consumers and the % of people that currently does not know if they consider is as a good or a bad thing. Especially within the Nordic countries and The Netherlands, Sustainable Brand Index™ shows that the % of people who are negative and distrusting of companies talking about their impact and sustainability work is growing. This growing divide between positive and negative consumers shows how important the quality of sustainability communication is, grounded in transparency, actions and facts. A trend to follow in the future, as the Baltic consumers are getting more mature and informed on sustainabiity issues.

% OF CONSUMERS WHO ARE EXPLICITLY POSITIVE OR NEGATIVE TOWARDS SUSTAINABILITY COMMUNICATION FROM COMPANIES



A growing divide.

We are at a moment in time when every brand feels the stress of getting into the sustainability dialogue. This is reflected in extreme amounts of sustainability communication and, unfortunately, extremely poor sustainability communication. Consumer interest in sustainability issues might be growing, but this does not automatically mean that sustainability is becoming more clear and easy to understand. Many consumers have a hard time assessing all communication and making sense of it.

With this pressure on all actors to become and to be perceived as more sustainable, there is currently a broad debate in society about how companies paint their sustainability picture. 'Greenwashing'- the practice by which companies make false claims about their positive impact on the environment – is not a new term, but it has received more attention over this last year. Countries see growing complaints to the respective ombudsman about misleading sustainability communication and advertising; and new national and European regulations around making green claims are developing fast.

The year 2020 has speeded up the challenges for companies claiming that they are purpose-driven but actually are not. Simply talking about purpose or what you as a brand 'hope to achieve' in a visionary future is hardly enough anymore.

03

RANKING

2021

Sustainability has set foot in Estonia.

Besides Covid-related news, without a doubt, another issue which stood out in Estonian media, business events, and societal debate, was sustainability. It was the first year ever when (mostly environmental) sustainability got such attention. The growth of business interest towards sustainability issues has continued to grow also during the Covid-crisis – the period which otherwise brought uncertainty of the future.

What used to be a concern of like-minded pioneers, and often civil society, became a topic which spoke to political and business leaders. The snowball began to roll.

The business environment is starting to orient itself towards not only economic but also environmental sustainability (however it must be considered that environmental ambitions are often driven by economic drive and gain). Indeed, the trend becomes more prominent and clearer as years pass. This is not a surprise, as the shift is also taking place globally.

- There are many reasons as to why this is happening. Yes, customers are becoming more aware and thus expecting more responsibility from the businesses, but this seems to be a rather less pressing factor compared to others.
- The major drive seems to come from international investor's community who are stressing the need for comprehensive and ambitious sustainability strategies in order for the business cooperation to work well and to be in line with the investor's requirements.
- Thirdly, of course, the drive comes from the EU, and its directions and requirements. This is noticed by Baltic companies who are now paying more attention to their long-term resilience and competitiveness.

But this shift also brings a handful of challenges for the business owners and management boards. The most prominent one seems to be a growing need to assess their social and environmental impact, and set credible and ambitious, yet realistic, targets and opportunities for clean and just growth.

In Estonia, a great initiative was brought into life by civil society, business, and academic leaders – the Green Tiger (in Estonian "Rohetiiger"). Its mission is to make a leap into a greener and more sustainable future by devising and implementing environmentally friendly practices in all sectors. Several businesses have joined the movement to support the idea and gain ideas for building more sustainable brands. This year`s results of Sustainable Brand Index™ reveal that some participants of the Green Tiger initiative have improved their ranking compared to a previous year.

Here are some of our other observations and assumptions on the results of Sustainable Brand Index™ in Estonia:

- It is still clear that brands with local roots and a long history, and sectors which are closer to the daily lives of consumers (grocery stores, food and beverage) are perceived as more sustainable by Estonian consumers. Probably they have done some major things right for a long time already.
- Sectors which have greater and more tangible environmental footprint, face higher demand from consumers too – fuel, transport, electricity and heating companies need to think how to gain the trust of consumers on sustainability matters.
- Estonia saw a couple of major sustainability campaigns by some leading brands in 2020 – some of those increased the position of the brand in the Sustainable Brand Index™ clearly, others did not. However, we recommend being patient to see the benefits of all such initiatives.
- Sustainability is not a sprint, but a marathon (until we meet critical targets of course) – brands which have been the pioneers in Estonian society with dedicated sustainability approach, have witnessed very different kind of results in Sustainable Brand Index™ last year and this year – a sign that it takes time for initiatives and messages to work in the eyes of consumers.

Based on what we see on the market, we encourage brands to get more flesh on bones by integrating data-based evidence and hard facts into its sustainability stories – very soon the consumers are overwhelmed with overall messages, and they expect to see actual impact, however through a clear and sharp message. We wish you good luck!

THE ESTONIAN RANKING 2021

In this chapter you can discover the complete ranking of Sustainable Brand Index™ 2021 in Estonia. The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers. The Estonian Ranking consists of 50 brands this year, divided over 8 industries. Every year, Sustainable Brand Index™ is developing and growing. This means that new brands and industries are being added to provide a realistic representation of the Estonian market over time. Brands are selected based on a set of independent parameters, like market share, turnover and general brand awareness.

TOP 10

01
Kalev

02
Elron

03
Coop

04
Rimi

05
Tere

06
Salvest

07
Valio

08
Selver

09
Põltsamaa Felix

10
Farmi

SUSTAINABLE BRAND INDEX B2C

OFFICIAL RANKING 2021
ESTONIA

1. Kalev
2. Elron
3. Coop
4. Rimi
5. Tere
6. Salvest
7. Valio
8. Selver
9. Põltsamaa Felix
10. Farmi
11. Leibur
12. Eesti Pagar
13. Alexela
14. Rannarootsi
15. Fazer
16. Maks & Moorits
17. Apotheka
18. Prisma
19. Paulig
20. Eesti Leivatööstus
21. Eesti Energia
22. Telia
23. Elisa
24. Circle K
25. Südameapteek
26. Swedbank
27. Lux Express
28. Benu
29. Olerex
30. Tallegg
31. SEB
32. Tallink
33. Euroapteek
34. Rakvere
35. Nõo Lihatööstus
36. Viking Line
37. LHV
38. Santa Maria
39. Tallinna Linnatransport
40. Coop Pank
41. Bolt
42. Neste
43. Tele2
44. Eesti Gaas
45. Maxima
46. Elektrum
47. Utilitas
48. Fortum
49. airBaltic
50. Luminor

= Industry winner

ABOUT THE RANKING IN SUSTAINABLE BRAND INDEX™

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The maximum score in each area is 100%, making the total ranking score of brands between 0-200%. Within each area, we first of all measure consumer awareness levels around the responsibility of a brand (Sustainable Brand Awareness - SBA). Secondly, we measure consumer attitudes towards the responsibility of a brand (Sustainable Brand Quality - SBQ. The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know".

#sbindex2021

RANKING DEVELOPMENT 2020-2021

ABOUT THE RANKING

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In reality, the **maximum ranking score of 200%** (which would basically means a perfect score) is still far out of reach for all brands on the market. To clarify the 2021 ranking position of each brand included in Sustainable Brand Index™, a scale of all ranking scores have been provided in the overview below.

SCORES

- 100-120%
- 81-100%
- 61-80%
- 41-60%
- 21-40%
- 0-20%

2021 Score		2021	2020
87%	Kalev	1	1
81-100%	Elron	2	3
81-100%	Coop	3	5
81-100%	Rimi	4	11
81-100%	Tere	5	14
81-100%	Salvest	6	7
81-100%	Valio	7	9
61-80%	Selver	8	8
61-80%	Põltsamaa Felix	9	13
61-80%	Farmi	10	2
61-80%	Leibur	11	10
61-80%	Eesti Pagar	12	4
61-80%	Alexela	13	30
61-80%	Rannarootsi	14	24
61-80%	Fazer	15	15
61-80%	Maks & Moorits	16	23
61-80%	Apotheka	17	
61-80%	Prisma	18	12
61-80%	Paulig	19	22
61-80%	Eesti Leivatööstus	20	16
61-80%	Eesti Energia	21	32
61-80%	Telia	22	6
61-80%	Elisa	23	19
61-80%	Circle K	24	18
61-80%	Südameapteek	25	
61-80%	Swedbank	26	17
61-80%	Lux Express	27	21
61-80%	Benu	28	
61-80%	Olerex	29	34
61-80%	Tallegg	30	26
61-80%	SEB	31	35
61-80%	Tallink	32	20
61-80%	Euroapteek	33	
61-80%	Rakvere	34	38
61-80%	Nõo Lihatööstus	35	29
41-60%	Viking Line	36	33
41-60%	LHV	37	28
41-60%	Santa Maria	38	36
41-60%	Tallinna Linnatransport	39	39
41-60%	Coop Pank	40	27
41-60%	Bolt	41	40
41-60%	Neste	42	31
41-60%	Tele2	43	43
41-60%	Eesti Gaas	44	42
41-60%	Maxima	45	46
41-60%	Elektrum	46	44
41-60%	Utilitas	47	45
41-60%	Fortum	48	47
41-60%	airBaltic	49	48
38%	Luminor	50	50

04

INDUSTRY RANKINGS

2021

THE ESTONIAN RANKING 2021

INDUSTRIES MEASURED IN ESTONIA

Banks
Electricity & Heating
Food & Beverage
Fuel
Grocery Stores
Pharmacies
Telecom
Transport/Travel

TOTAL AMOUNT OF INDUSTRIES MEASURED IN ESTONIA

8

TOTAL AMOUNT OF BRANDS MEASURED IN ESTONIA

50

THE RANKING SCORE

The ranking of Sustainable Brand Index™ shows how brands are perceived on sustainability according to consumers. Ranking scores are based on two main parts; environmental responsibility and social responsibility. The maximum score in each area is 100%, making the total ranking score of brands between 0-200%. Within each area, we first of all measure consumer awareness levels around the responsibility of a brand (Sustainable Brand Awareness - SBA). Secondly, we measure consumer attitudes towards the responsibility of a brand (Sustainable Brand Quality - SBQ. The final score of each brand is based on the percentage of consumers who assess a company's sustainability efforts as good (4) or very good (5) on a scale of 1-5 + "don't know".

DEFINITION OF SUSTAINABILITY

The definition of environmental and social responsibility The basis for the ranking in Sustainable Brand Index™ is the UN Global Goals for Sustainable Development (SDGs). The evaluation is done on an overarching level with the goals as a basis for the definition. Each goal is categorised according to the area (environment or social) in which it belongs.

TARGET GROUP & BRAND SELECTION

The target audience in Sustainable Brand Index™ B2C is the general public, 16-75 years, in each country. Brands are selected yearly across a variety of industries, based on a set of independent parameters. Parameters include: market share on the respective market, turnover and general brand awareness. The purpose of these criteria is to create a selection that mirrors the brands that consumers meet in their everyday life. Brands cannot choose to be included or excluded from the study. In the Estonian, Latvian and Lithuanian study of Sustainable Brand Index™, every brand is evaluated by at least 800 people.

INDUSTRY OVERVIEW 2021

RANKING OF INDUSTRIES

The Industry Ranking overview shows how industries overall are perceived on sustainability according to Estonian consumers. The ranking of industries is based on the average ranking score of all the brands that are measured within that industry combined. Industries that rank high are on average more positively perceived on sustainability by Estonian consumers.

Ranking position	Industry
01.	GROCERY STORES
02.	FOOD & BEVERAGE
03.	FUEL
04.	PHARMACIES
05.	TELECOM
06.	TRANSPORT/TRAVEL
07.	BANKS
08.	ELECTRICITY & HEATING

INDUSTRY WINNER

The Industry Winner overview shows the brands that are perceived as the most sustainable brand within their specific industry according to Estonian consumers.

In other words, the brand is ranked highest in comparison to the other brands that are measured within their industry, according to Sustainable Brand Index™ 2021.

Ranking position	Brand	Industry
1	KALEV	FOOD & BEVERAGE
2	ELRON	TRANSPORT/TRAVEL
3	COOP	GROCERY STORES
13	ALEXELA	FUEL
17	APOTHEKA	PHARMACIES
21	EESTI ENERGIA	ELECTRICITY & HEATING
22	TELIA	TELECOM
26	SWEDBANK	BANKS

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY BANKS RANKS

7th

BANKS

Ranking position	Brand
26	Swedbank
31	SEB
37	LHV
40	Coop Pank
50	Luminor

SUSTAINABLE BRAND INDEX B2C

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY ELECTRICITY & HEATING RANKS

8th

ELECTRICITY & HEATING

Ranking position	Brand
21	Eesti Energia
44	Eesti Gaas
46	Elektrum
47	Utilitas
48	Fortum

SUSTAINABLE BRAND INDEX

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY FOOD & BEVERAGE RANKS

2nd

FOOD & BEVERAGE

Ranking position	Brand
1	Kalev
5	Tere
6	Salvest
7	Valio
9	Põltsamaa Felix
10	Farmi
11	Leibur
12	Eesti Pagar
14	Rannarootsi
15	Fazer
16	Maks & Moorits
19	Paulig
20	Eesti Leivatööstus
30	Tallegg
34	Rakvere
35	Nõo Lihatööstus
38	Santa Maria

SUSTAINABLE BRAND INDEX

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY FUEL RANKS

3rd

FUEL

Ranking position	Brand
13	Alexela
24	Circle K
29	Olerex
42	Neste

SUSTAINABLE BRAND INDEX B2C

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY GROCERY STORES RANKS

1st

GROCERY STORES

Ranking position	Brand
3	Coop
4	Rimi
8	Selver
18	Prisma
45	Maxima

SUSTAINABLE BRAND INDEX

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY PHARMACIES RANKS

4th

PHARMACIES

Ranking position	Brand
17	Apotheka
25	Südameapteek
28	Benu
33	Euroapteek

SUSTAINABLE BRAND INDEX B2C

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY TELECOM RANKS

5th

TELECOM

Ranking position	Brand
22	Telia
23	Elisa
43	Tele2

SUSTAINABLE BRAND INDEX B2C

ESTONIA

2021
INDUSTRY RANKING

OUT OF THE TOTAL 8 INDUSTRIES MEASURED, THE INDUSTRY TRANSPORT/TRAVEL RANKS

6th

TRANSPORT/TRAVEL

Ranking position	Brand
2	Elron
27	Lux Express
32	Tallink
36	Viking Line
39	Tallinna Linnatransport
41	Bolt
49	airBaltic

SUSTAINABLE BRAND INDEX

On a mission to create sustainable brands.

SB Insight is the founder of Sustainable Brand Index™, Europe's largest independent brand study on sustainability. We are a Stockholm-based insight agency on a mission to create sustainable brands. We provide decision-making material on how sustainability affects branding, communication and business development. Through in-depth studies, reports and education solutions, we offer our clients data driven sustainability insights, tailored analysis and strategic tools.

Our team helps you in your transition to building a more sustainable brand. With over ten years of experience and data from different sectors and markets, we have broad and in-depth knowledge of brands, industries, consumers and market developments. We help you by creating a holistic sustainability analysis that can be difficult to create on your own.

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SB INSIGHT

This report was written by SB Insight, the founder of Sustainable Brand Index™.