

MINDFUL CONSUMPTION +36%



UPCYCLED +17%



LOCAL INGREDIENTS +23%



THE FUTURE OF SUSTAINABILITY

Analyzing the battlegrounds for **Gen Z** consumers



Gen Z post online about sustainability

3.5x

more than the rest of the population.

They dominate the sustainability conversation in our data.

If Millennials were the last generation to remember a pre-internet age – Gen Z will be last to remember a time before the impacts of climate change became real.

They are demanding action from governments, corporations, brands and wider society to avert a climate crisis.

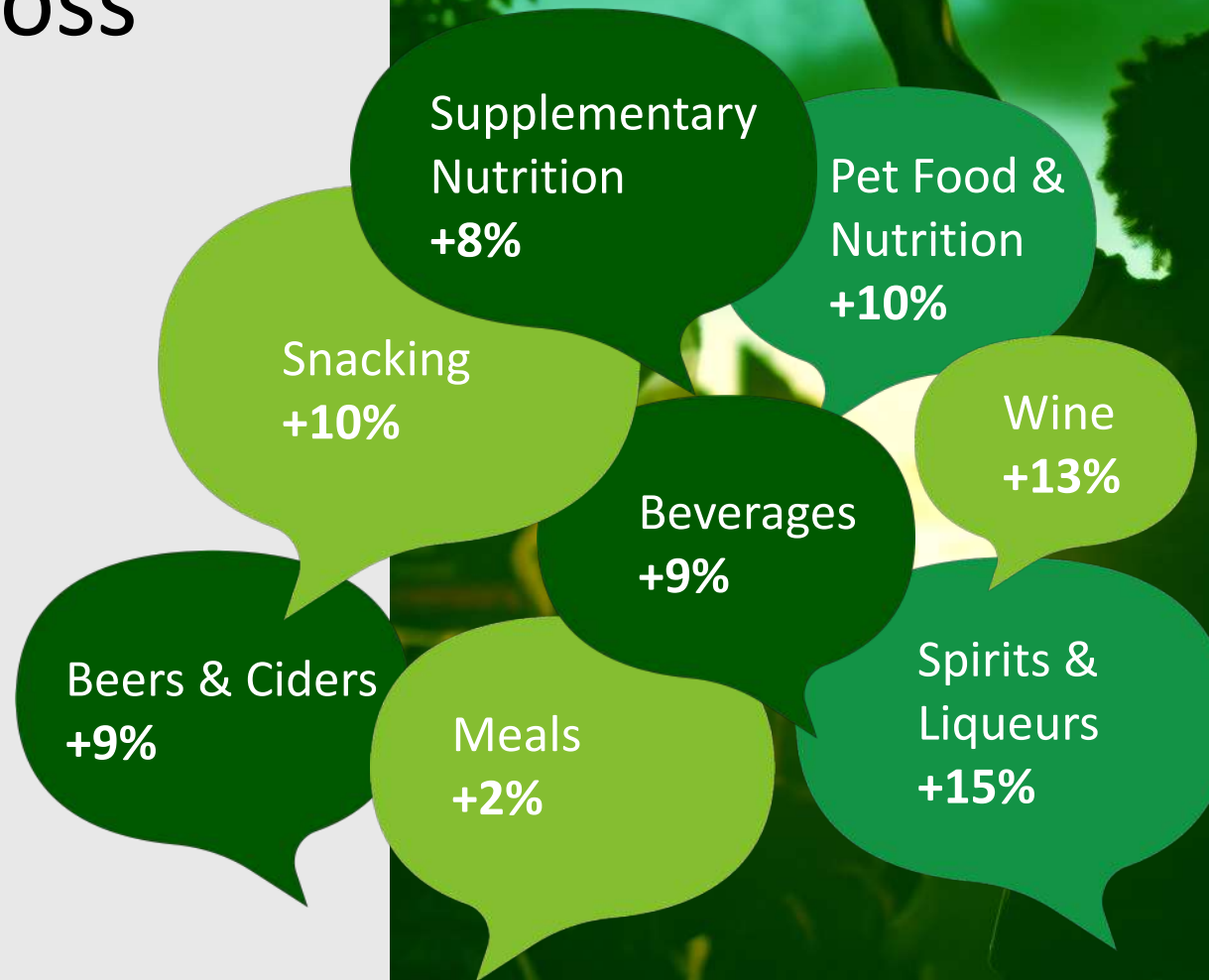
As Gen Z's economic influence and purchasing power grows, it's essential for brands to understand what's driving their behavior.

In this report we will analyze the key battlegrounds for Gen Z consumers in 2025 and beyond.

The sustainability conversation is growing (and growing) across the CPG space.

As temperatures rise and climates change, the production and price of food and beverage products are impacted.

Our data shows a consistent increase in consumer conversation related to sustainability across all our datasets.



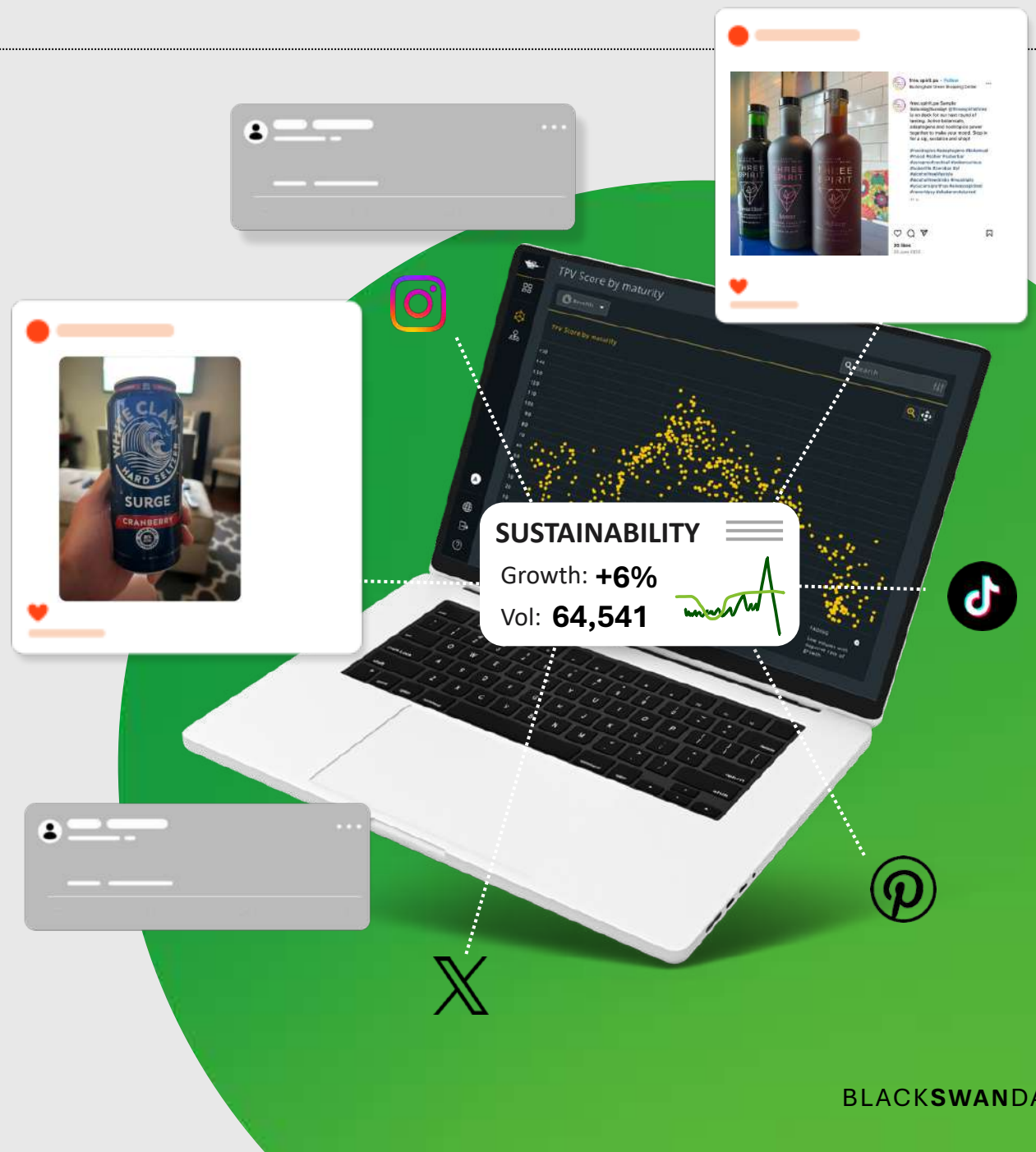
We are Black Swan Data

The insights inside this report do not come from surveys, panels or focus groups. There are no questions asked. Nor any prompted responses.

Our technology applies AI and predictive analytics to millions of social and online data points to understand behavioral trends.

It identifies, connects and predicts emerging trends and future consumer needs with **89%** accuracy.

Leading CPG brands are leveraging this data to make faster, more confident, evidence-driven decisions along each stage of the innovation process.



A different approach

This report was created using our
consumer intelligence platform

How does it work?

Our platform retrieves all the relevant consumer conversations in a category; in this example, **41+ million USA Beverages** conversations.

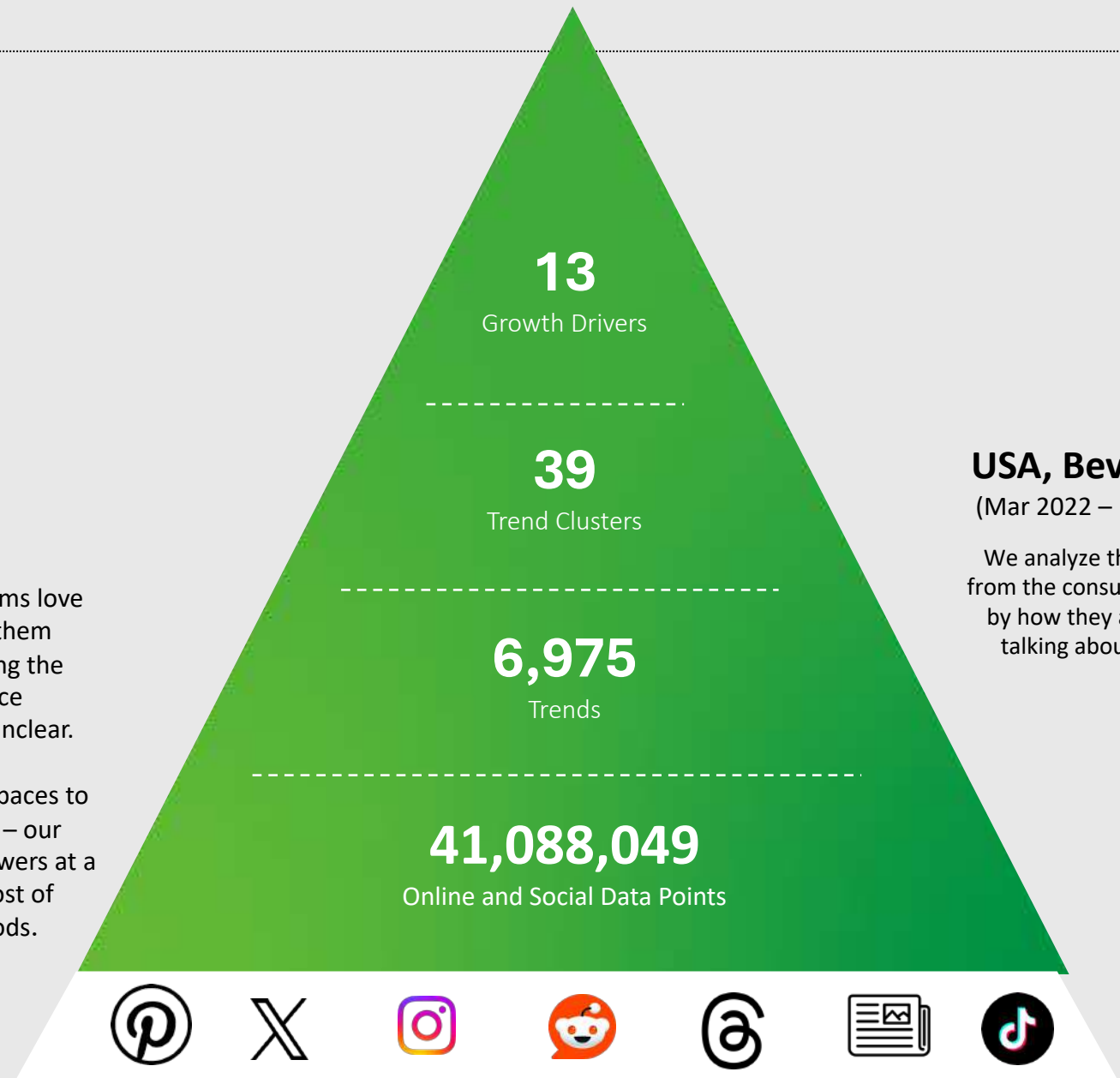
We use AI and data science to isolate all the individual trending topics and understand how they cluster and ladder-up into category growth drivers.

This dynamic segmentation framework is refreshed monthly and evolves as consumers and the category evolves.

Game-changing capabilities

Insight and Innovation teams love using this data as it helps them make better decisions along the NPD process when evidence is lacking and the path is unclear.

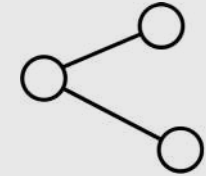
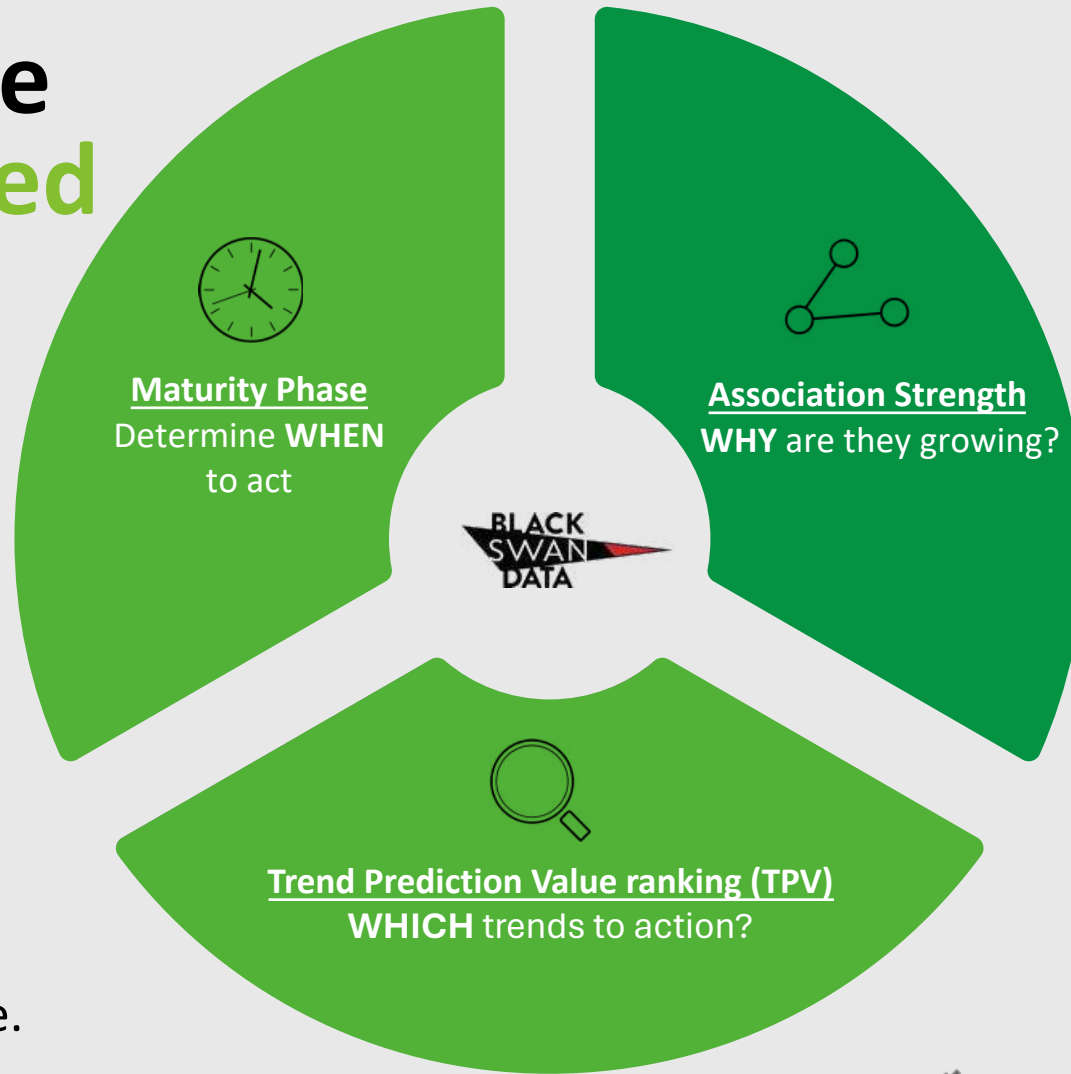
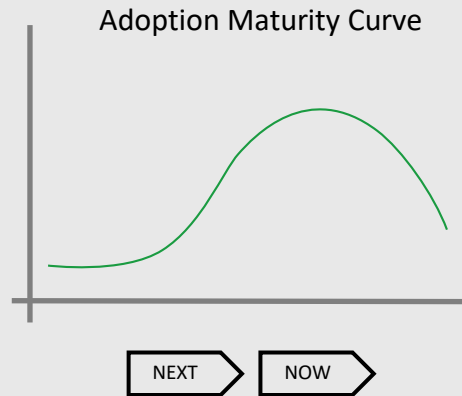
From activating demand spaces to optimizing on-pack claims – our solutions give you the answers at a fraction of the time and cost of traditional research methods.



USA, Beverages
(Mar 2022 – Mar 2024)

We analyze the category from the consumers' POV, by how they are actively talking about it online.

Our data science metrics explained



0%

100%

0% means these trends are not talked about together; there's no association

100% means trends always appear together; there's a high association

Know **WHAT** trends to prioritize.
WHY they should be activated.
And **WHEN** to act on them.


Conversation
Volume




Conversation
Growth




Future
Forecast

Our sustainability framework

The sustainability landscape is **complex** and **dynamic** – this framework tracks the topics that are driving consumer behavior.

It consists of 8 pillars and 34 themes, from ecosystems and biodiversity to green crypto and big tech.

This framework can be mapped onto any consumer goods category.

Climate

- Focusing on Carbon
- Green Finance & Investing
- Climate Change
- Extreme Weather
- Policies & Social Action
- Air Quality



Energy & Transport

- Non-Renewable Energy & Fuel
- Renewable & Green Energy
- Sustainable Transport



Food, Lifestyle & Provenance

- Green Homes
- Sustainable Fashion
- Green Cosmetics & Beauty
- Health & Diet
- Conscious Lifestyles
- Country of Origin



Human-Centric Sustainability

- Sustainability at Work
- Social Sustainability



Appreciating & Preserving Nature

- Earth's Lungs
- Green Spaces
- Ecosystems & Biodiversity



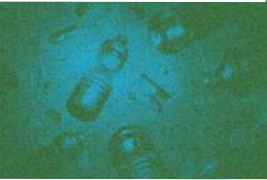
Land, Animals & Water

- Life Below Water
- Farming & Agriculture
- Urban Agriculture
- Animal Cruelty & Testing
- Clean Water & Accessibility



Recycling & Waste

- Packaging & Labelling
- Age of Plastics
- Recycle & Reuse
- Waste



Industry, Innovation & Infrastructure

- Green Crypto & Big Tech
- Green Economy
- Innovating a Better Future
- Supply Chains & Fairtrade
- Green Cities & Buildings

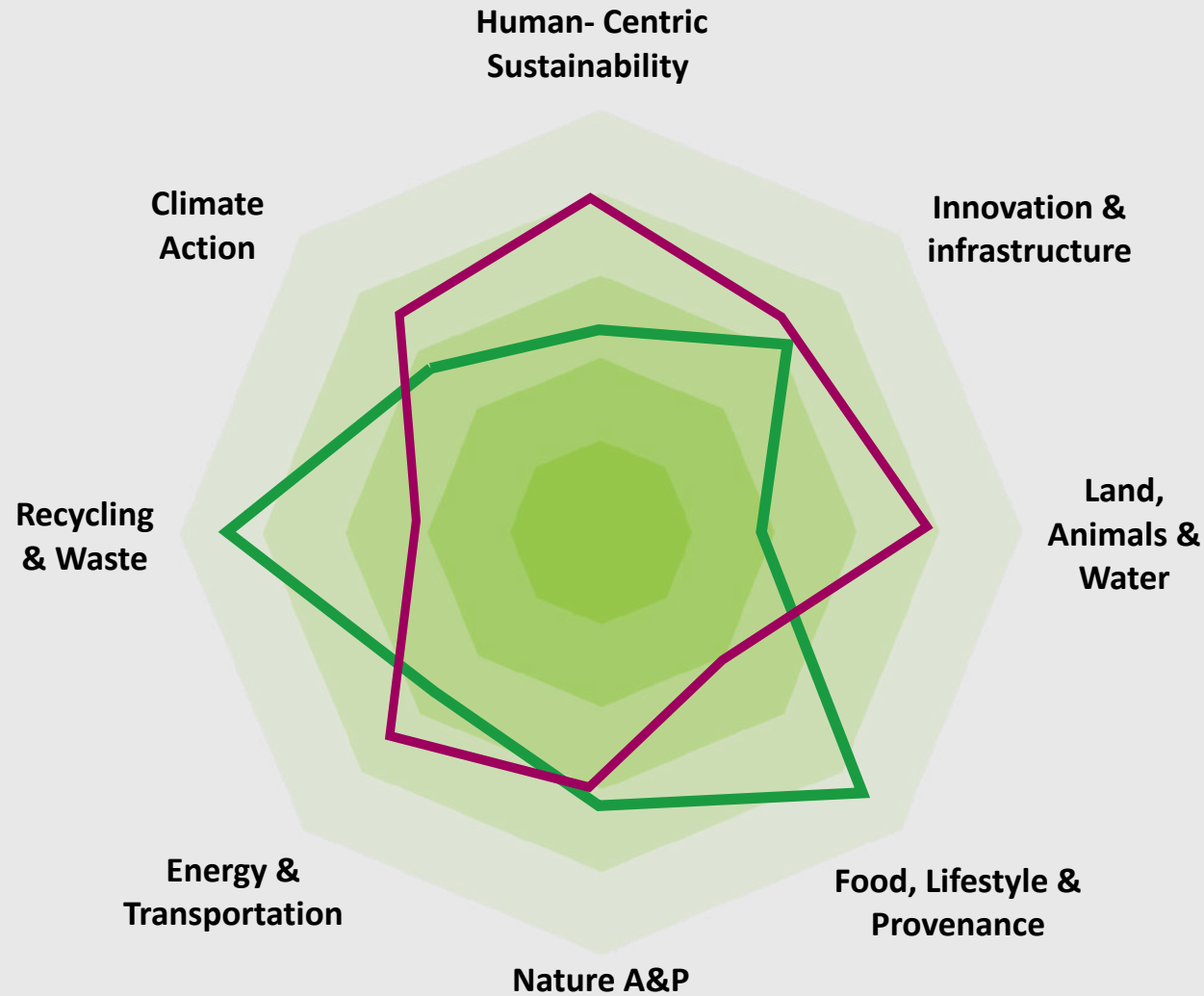


Gen Z and Sustainability

We've overlayed **Gen Z** onto our sustainability framework to analyze which topics matter most to this consumer group.

Gen Z data over-indexes against all 8 pillars, but they score highest in **Food, Lifestyle & Provenance**, **Recycling & Waste**, and to a lesser extent, **Nature Appreciation & Preservation**.

We've used this analysis to inform the 9 battlegrounds for Gen Z...



GEN Z



9 battlegrounds for Gen Z

Our analysis has revealed 9 distinct areas which represent sustainability "**battlegrounds**" for brands who want to engage with Gen Z.

In this report, we're going to explore **Convenient sustainability solutions**, **Price vs sustainability** and **Brand boycotts and cancellation**.



A person wearing a dark suit and a smartwatch is shown from the chest down. They are holding a black payment terminal with their right hand, and their left hand is raised, showing the smartwatch. The background is blurred, showing other people in a brightly lit indoor space. The entire image has a green color overlay.

Gen Z vs Convenience

Battleground #3 – Dataset: USA Beverages

The landscape

The battle between **convenience** and **sustainability** is a story of two fundamental, competing consumer needs.

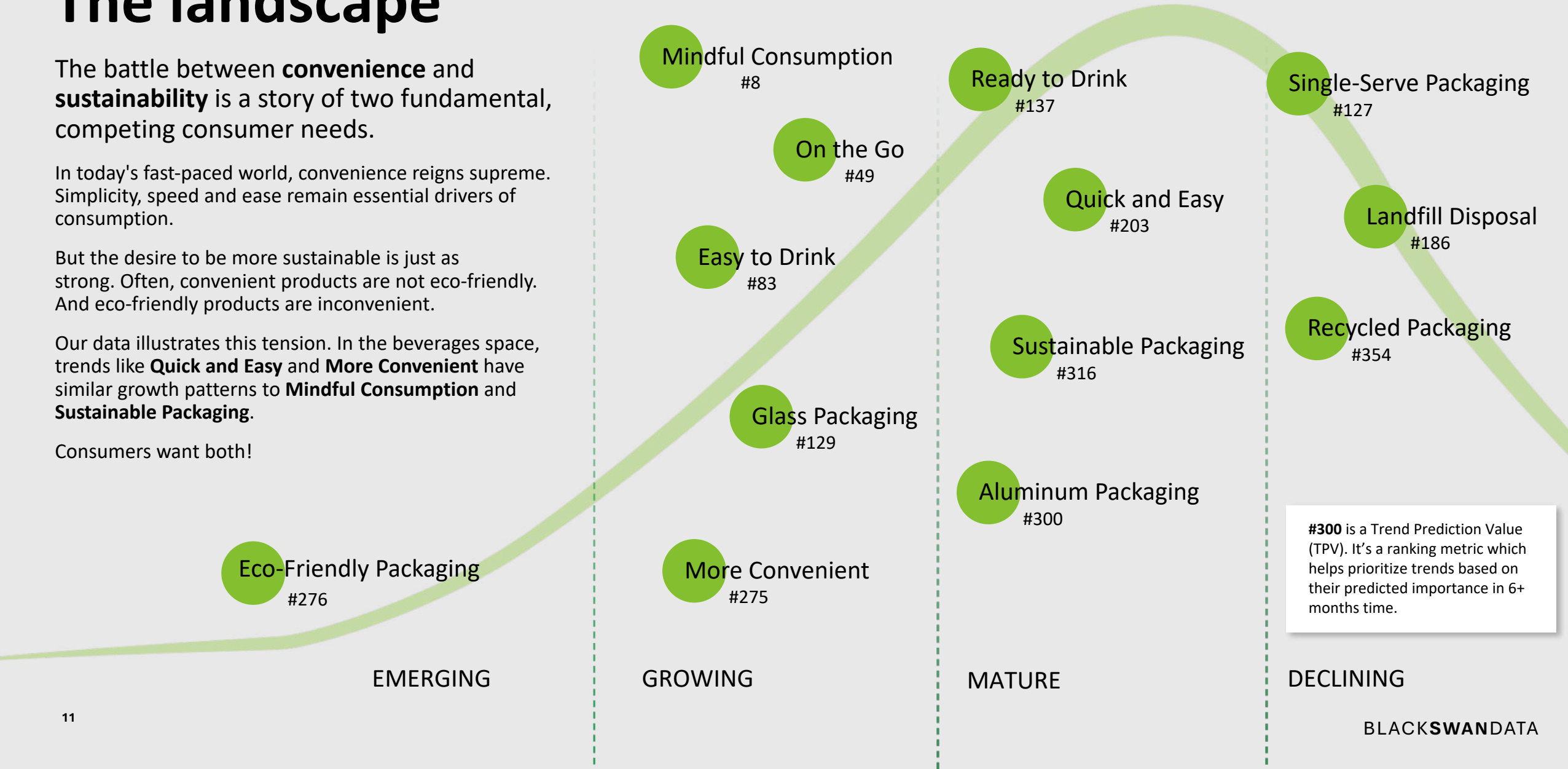
In today's fast-paced world, convenience reigns supreme. Simplicity, speed and ease remain essential drivers of consumption.

But the desire to be more sustainable is just as strong. Often, convenient products are not eco-friendly. And eco-friendly products are inconvenient.

Our data illustrates this tension. In the beverages space, trends like **Quick and Easy** and **More Convenient** have similar growth patterns to **Mindful Consumption** and **Sustainable Packaging**.

Consumers want both!

Maturity of sustainability trends associated with Convenience + TPV Rank
(USA Beverages, Mar '22 – Mar '24)



Gen Z's perspective

Just like the rest of the population, **convenience** and **instant gratification** are a core need of the Gen Z lifestyle.

But they recognize the conflict between these needs and their eco-friendly leanings.

They are being forced to choose between convenient and sustainable options. And this is causing resentment.

Gen Z'ers are particularly angry at brand's slowness in moving away from plastic packaging.

They feel frustrated and powerless for wanting more sustainable choices in a system that seems apathetic to sustainability.

Gen Z emotions



EMERGING

GROWING

MATURE

DECLINING



How can brands appeal to Gen Z?

Gen Z consumers are searching for **guilt-free** convenience.

For most consumers, 'guilt-free' is connected to health. It refers to a product being low in sugar or calories.

But for Gen Z, guilt-free means no impact.

It's associated with the **Mindful Consumption** trend. A movement that prioritizes mental, physical and ecological wellbeing.

Gen Z are also championing brands that are antagonistic to the systems they view as unsustainable or unethical.

They're angry. And will invest in brands that think and act similarly.

Trends associated with Mindful Consumption

Relieves Stress

TPV #190
Vol: 12,317
Growth: +5%

Enjoyable Moment

TPV #199
Vol: 14,512
Growth: +22%

Sleek/Elegant Packaging

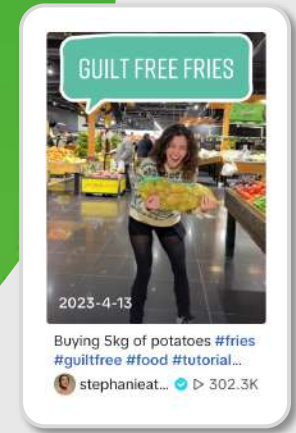
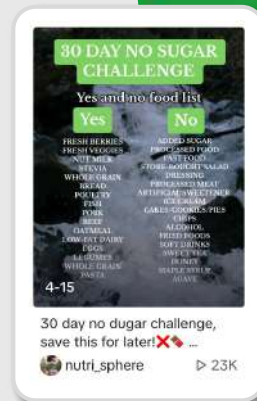
TPV #443
Vol: 232
Growth: +51%

Mindful Consumption

TPV #5
Vol: 1,721
Growth: +36%

Mindful Drinking

TPV #481
Vol: 190
Growth: +23%



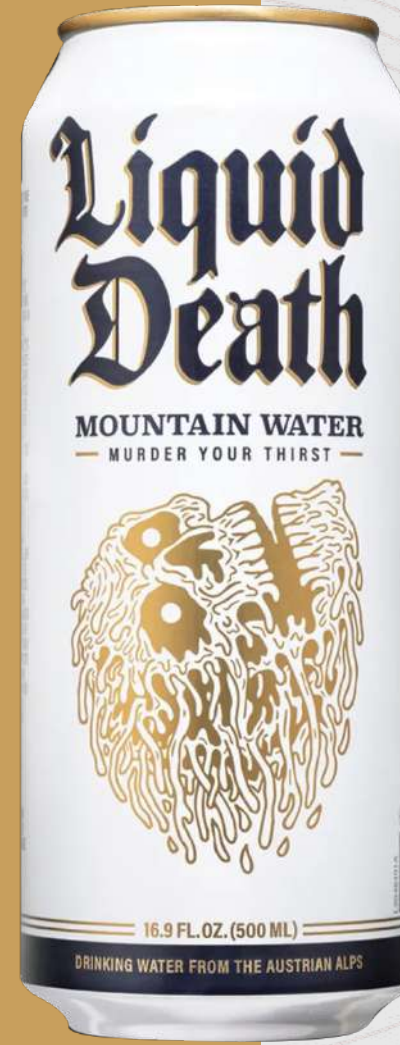
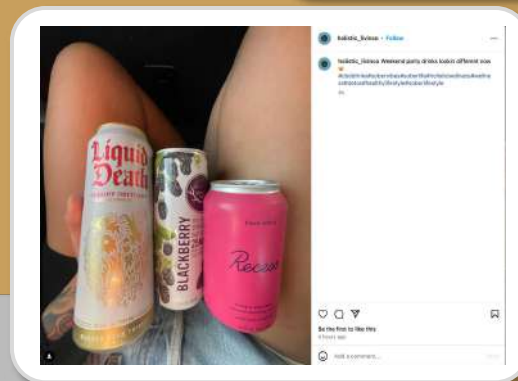
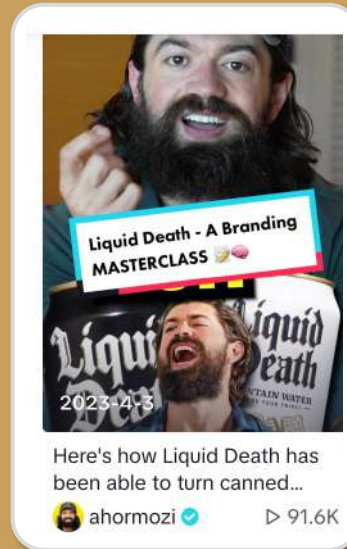
Brand spotlight

Liquid Death is a California-based canned water brand. Their motto? Death to plastic.

It describes their mission to replace plastic with 'infinitely' recyclable aluminum.

Their branding also unapologetically calls out the beverage industry's plastic pollution problem.

Liquid Death offers Gen Z consumers a way to enjoy guilt-free convenience while supporting a brand that challenges the system.



Innovative
TPV #275
Vol: 76,253
Growth: +7%

Premium
TPV #271
Vol: 68,705
Growth: +6%

Canned
TPV #235
Vol: 67,453
Growth: +5%

Aluminum Packaging
TPV #383
Vol: 1,523
Growth: -12%

Plastic Alternative
TPV #464
Vol: 603
Growth: -3%

Recyclable
TPV #203
Vol: 46,961
Growth: -15%

Trends associated with **Liquid Death**

Cool Packaging
TPV #632
Vol: 93
Growth: -13%



Gen Z vs Price

Battleground #4 – Dataset: USA Snacking

The landscape

The seemingly unending **cost-of-living crisis** has made consumers hyper-aware of the price of food.

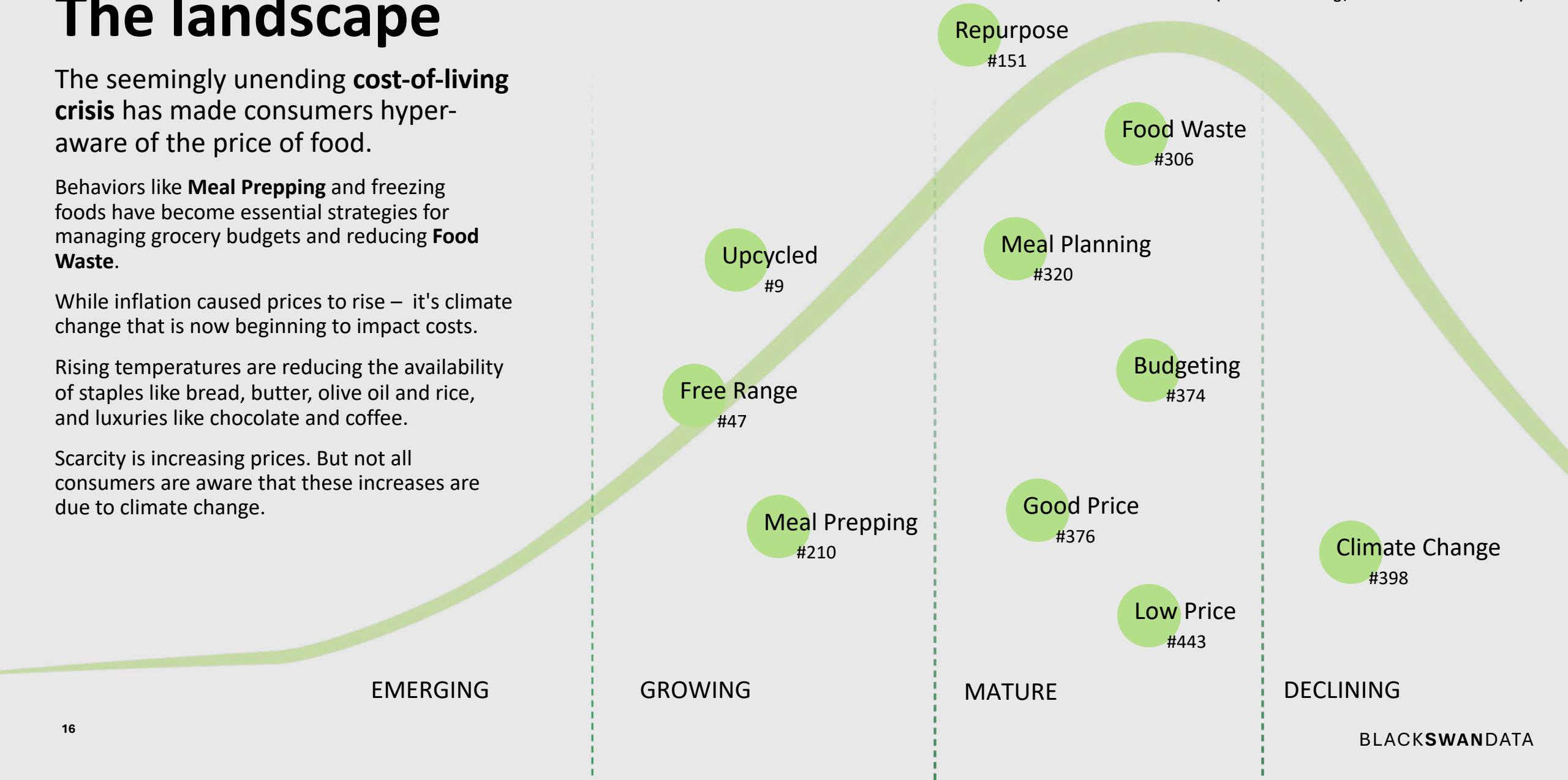
Behaviors like **Meal Prepping** and freezing foods have become essential strategies for managing grocery budgets and reducing **Food Waste**.

While inflation caused prices to rise – it's climate change that is now beginning to impact costs.

Rising temperatures are reducing the availability of staples like bread, butter, olive oil and rice, and luxuries like chocolate and coffee.

Scarcity is increasing prices. But not all consumers are aware that these increases are due to climate change.

Maturity of sustainability trends associated with Convenience + TPV Rank
(USA Snacking, Mar '22 – Mar '24)



Gen Z's perspective

The tension between sustainability and affordability is more intense for Gen Z because they tend to have **less disposable income**.

It's harder for consumers under 30 to afford local, organic food.

This creates a feeling of envy and even embarrassment as they are forced to revert to budget solutions.

Gen Z are **Upcycling** ingredients and packaging to reduce waste. It saves money and the planet.

They're also avid **Meal Planners**. They're thinking meal-by-meal to manage their finances and manage their footprint.

Gen Z emotions



Complex –
Embarrassment



Anger –
Envy



Fear –
Pressured

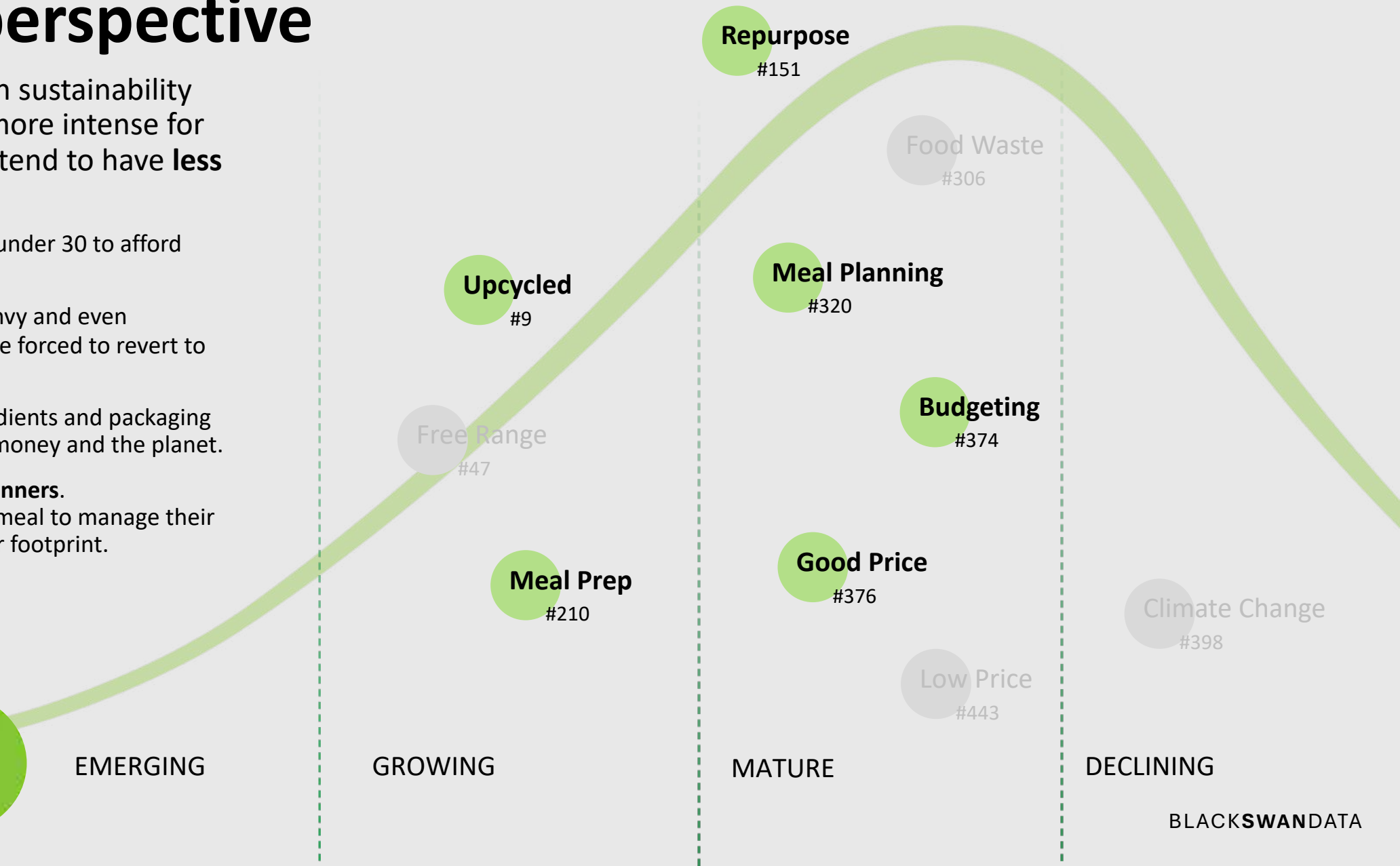
EMERGING

GROWING

MATURE

DECLINING

BLACKSWANDATA



How can brands appeal to Gen Z?

Brands need to empower young consumers to make **smarter decisions** in their food and beverage consumption

It's not a case of making products cheaper than the competition.

Brands should help Gen Z follow a lifestyle they aspire to. Getting the most from their budget while minimizing their environmental impact.

Gen Z take pride in smarter shopping habits. It helps them meet their responsibilities as a sustainable consumer.

And gives them a sense of beating the system.

Trends associated with **Meal Prep**

Innovative

TPV #306
Vol: 134,510
Growth: +5%

Best-Before Date

TPV #170
Vol: 1,573
Growth: +10%

Food Recycling

TPV #629
Vol: 45
Growth: +57%

Meal Planning

TPV #420
Vol: 188,860
Growth: +16%

Convenience

TPV #268
Vol: 70,059
Growth: +23%



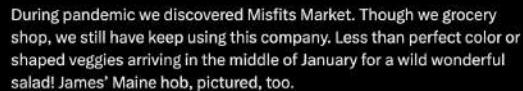
This should be stopped 🙄
#foodwaste #consumerism...
🔥 hotspotme... ▷ 19.4K



#stitch with ▶ @Asmr Pote
@WASILW link in his bio...
👤 munchy_mo... ▷ 375.2K



It ticks all the boxes for Gen Z. Helping them eat well on a budget and contribute to fixing a broken food system.



GOOD KARMA
positively nourishing

Gen Z vs Brands

Battleground #6 — Datasets: USA Beverages and Snacking



The landscape

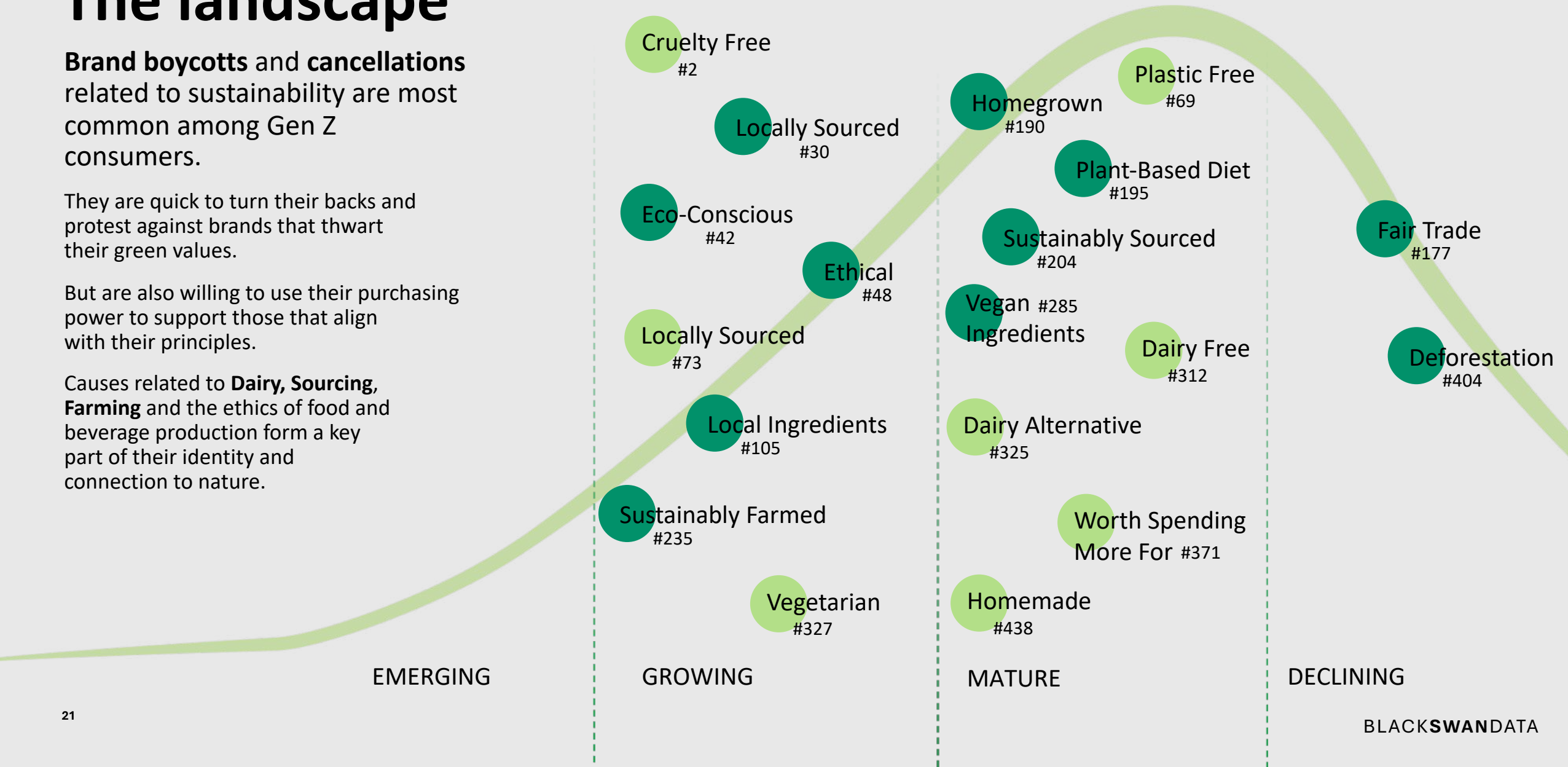
Brand boycotts and cancellations related to sustainability are most common among Gen Z consumers.

They are quick to turn their backs and protest against brands that thwart their green values.

But are also willing to use their purchasing power to support those that align with their principles.

Causes related to **Dairy, Sourcing, Farming** and the ethics of food and beverage production form a key part of their identity and connection to nature.

Maturity of sustainability trends associated with Convenience + TPV Rank (USA Snacking & Beverages, Mar '22 – Mar '24)



Trends that over-index with Gen Z

Gen Z's perspective

Gen Z are highly-sensitive to **greenwashing** practices.

They are forming online communities on TikTok, Reddit and other platforms to name and shame brands they believe are greenwashing.





Younger consumers also feel isolated from other age groups.

Especially when they are living with family members who buy environmentally unfriendly products and brands.

It's creating feelings of powerlessness to affect meaningful change.

Their beliefs are driving them towards **Plastic** and **Cruelty Free** products.

Gen Z emotions



Complex – Insignificant

Anger – Offended

Contempt – Blame

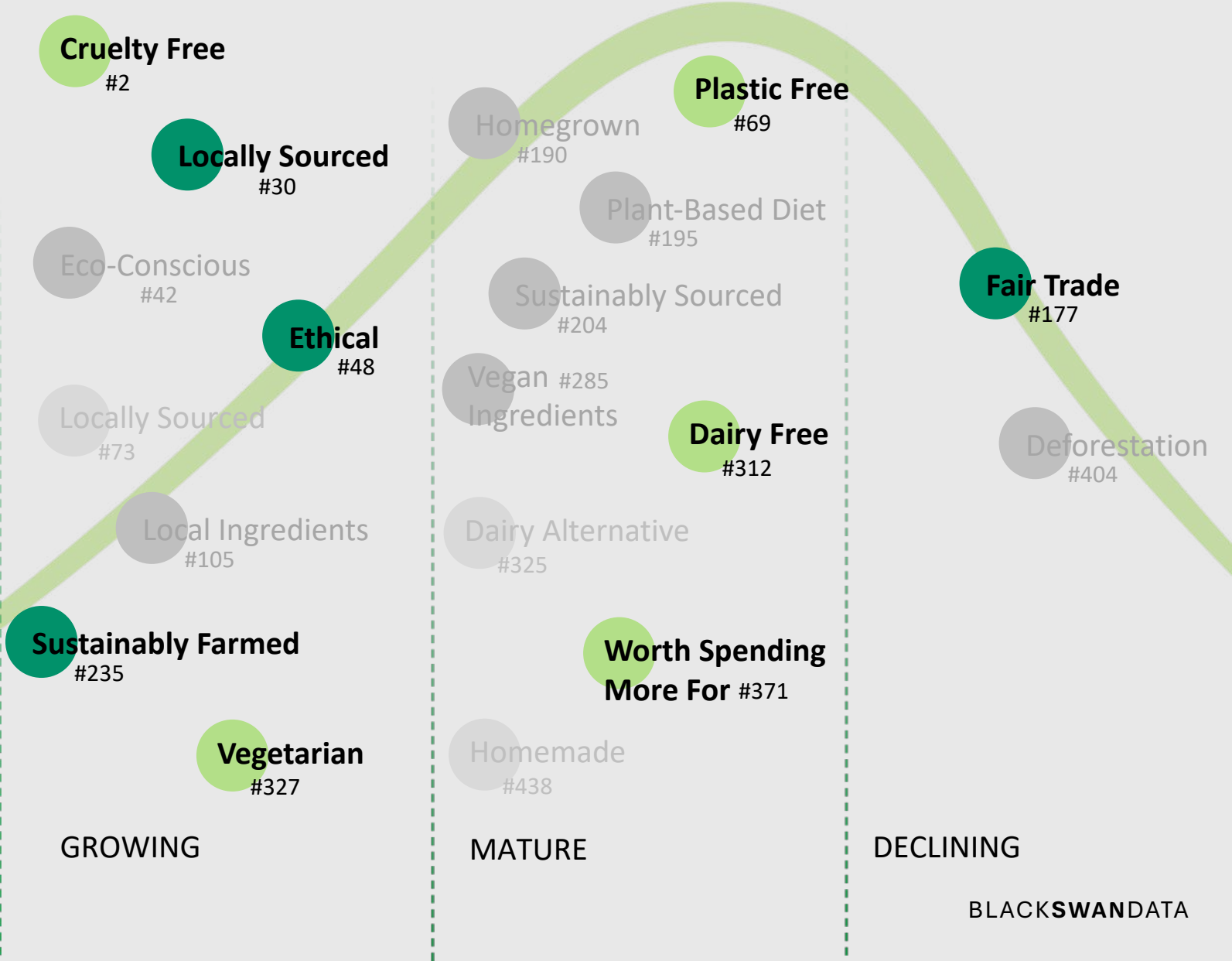
Sadness – Shame

EMERGING

GROWING

MATURE

DECLINING



How can brands appeal to Gen Z?

Gen Z want to be listened to – brands should prioritize **authentic initiatives** and **transparent comm's** to build trust.

Authenticity must underpin every action.

Gen Z value genuine eco-friendly practices. And want to be directly engaged in brands' sustainability efforts

They are open to being educated on new and innovative initiatives and will invest time engaging with brands that do so.

These consumers will not be ignored. In their eyes, a brand is either ethical or unethical.

There is no gray area.



Brand spotlight

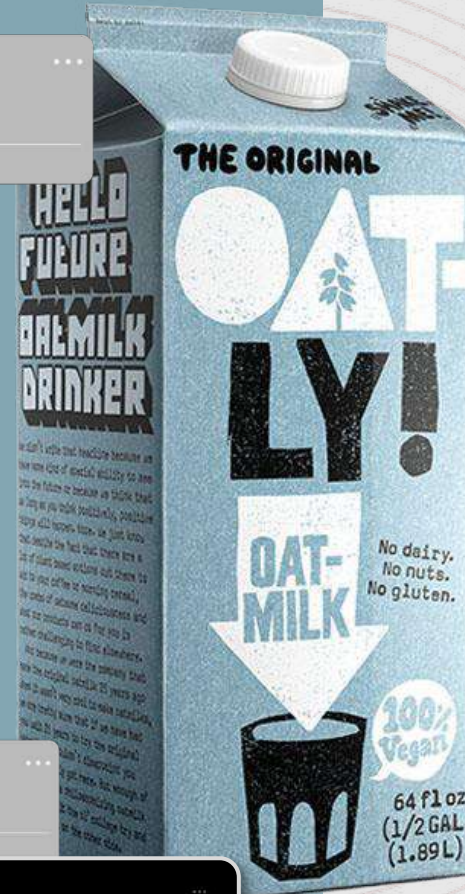
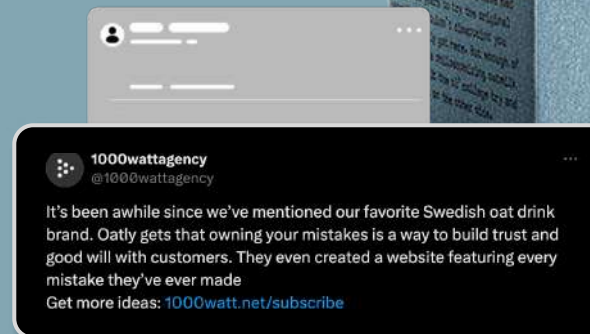
Gen Z champion **Oatly** as being a sustainable brand.

They have aggressively marketed themselves in the sustainability space - taking the dairy industry head on.

Oatly publish an annual **Sustainability Report**, alongside transparent info on their environmental impact.

The brand have made mistakes. But Gen Z continue to perceive them as a sustainable because they owned up to their missteps.

Their business practices and investments are helping to change the dairy industry. But it's their commitment to transparency that appeals to Gen Z.



Natural Ingredients

TPV #23
Vol: 2,106
Growth: +19%

Natural Flavor

TPV #275
Vol: 1,005
Growth: +5%

Simple Ingredients

TPV #237
Vol: 456
Growth: +13%

Healthy

TPV #4
Vol: 6,164
Growth: +22%

Gluten-Free

TPV #76
Vol: 59,814
Growth: +33%

Trends associated with **Oatly**

Summary

Gen Z vs Convenience

Young consumers want guilt-free convenience – they want immediate gratification without the environmental impact.

Gen Z vs Price

Empower Gen Z to act smarter; to get more value from their budget and reduce any waste.

Gen Z vs Brands

There is zero tolerance for greenwashing. Prioritize authentic sustainability initiatives and transparent communication.



We can help you navigate this changing space

We've analysed just 3 out of the 9 sustainability "battlegrounds" for brands who want to engage with Gen Z.

To explore more and understand how the conversation is evolving in your category, please get in contact...



BLACK SWAN DATA

Authors:



Chris Todd
Head of Insights



Michaela Oncker
Insights Consultant

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