

Sustainability Leadership in 2021: Global and Asia Insights

GlobeScan / SustainAbility 2021 Sustainability Leaders Survey

Welcome



Victoria Gilbert

Director, APAC
GlobeScan



Yulia Dobrolyubova

Partner, Corporate
Sustainability & Climate
Change Lead
Southeast Asia, ERM



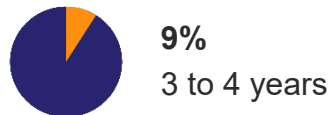
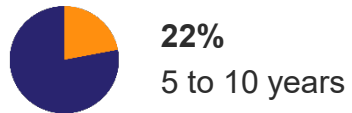
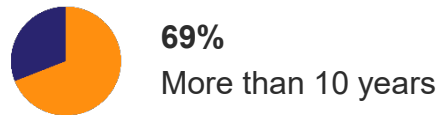
The World We Are In Now



Sustainability Leaders Survey 2021

Experience

Respondents have the following experience working on sustainability issues:



Geography

Experts surveyed span 72 countries in the following regions:



26%
Europe



24%
Asia Pacific



23%
North America



21%
Latin America /
Caribbean



6%
Africa / Middle
East

Sectors

Respondents were drawn from the following sectors:



32%
Service & Media



30%
Corporate



19%
NGO



14%
Academic &
Research



4%
Government



2%
Other

Urgency of Top Sustainable Development Challenges Increasing

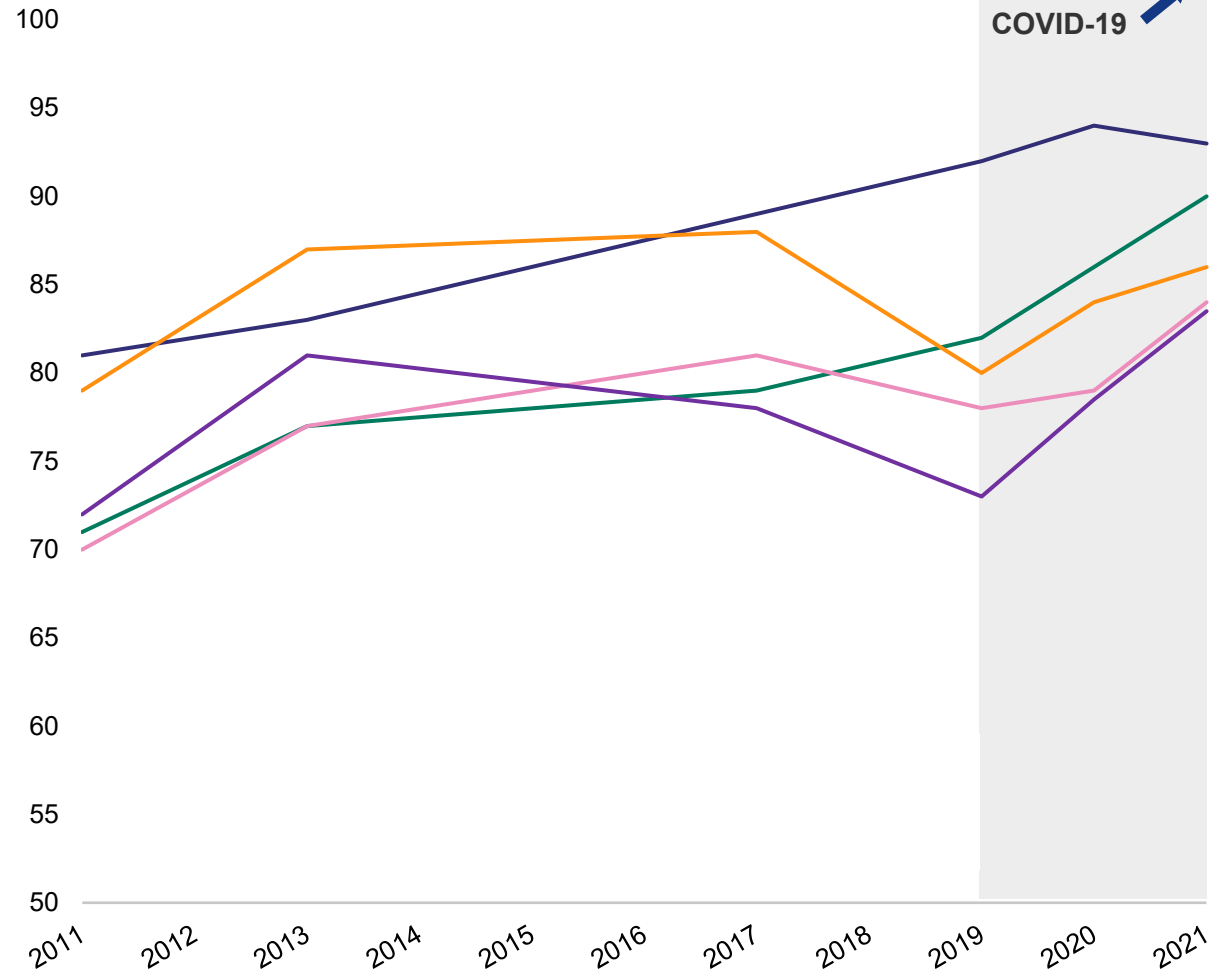


Question

Considering society's numerous sustainable development challenges, please rate the urgency of each of the following:

Please use a scale of 1 to 5 where 1 means "not urgent at all" and 5 means "very urgent."

% of Global Experts, "Urgent" (4+5), 2011–2021



Top 5 sustainable development challenges globally:

- 1 Climate change
- 2 Biodiversity loss
- 3 Water scarcity
- 4 Water pollution
- 5 Poverty

European Nations Top-ranked among Governments Advancing Sustainability



Question

What specific national governments do you think are leaders in advancing sustainable development?



- First country to become **carbon negative**
- Developed the signature **Gross National Happiness index** based on four pillars: 1) *sustainable development*, 2) *environmental protection*, 3) *cultural preservation*, and 4) *good governance*.



- Established **The Singapore Green Plan 2030**, a whole-of-nation sustainability movement
- Sets **ambitious and concrete targets** over the next 10 years, such as: *Tree planting*, *Solar energy deployment*, *Waste reduction*, *Carbon neutral schools*, *Cleaner-energy car models*

Top Mentions by experts globally, 2021

1	Sweden
2	Germany
3	Denmark
4	Norway
5	United Kingdom
6	Costa Rica
7	New Zealand
8	Netherlands
9	France
10	Finland
11	Bhutan
12	Canada
13	Singapore
14	USA
15	Switzerland

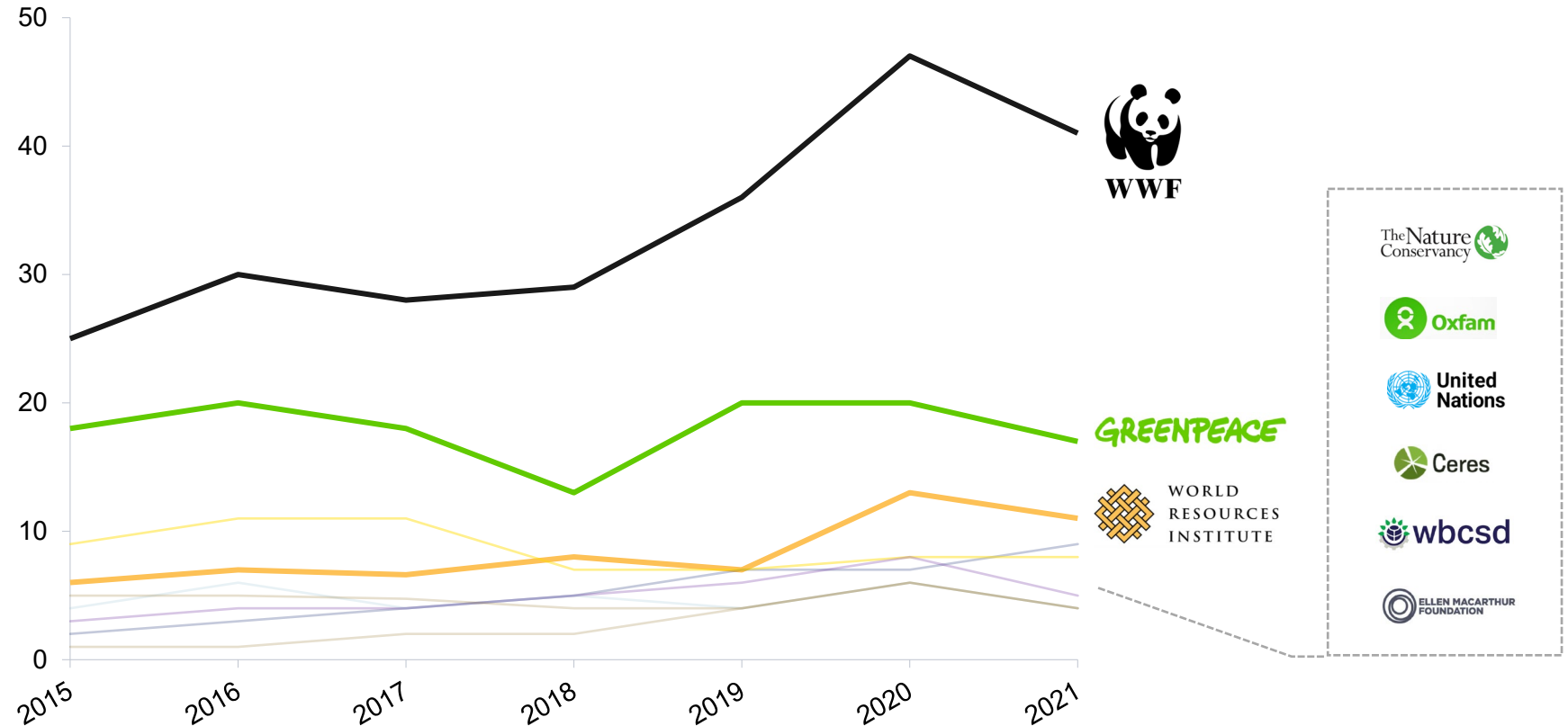
WWF and Greenpeace Most Recognized NGOs both Globally and in Asia



Question

What specific NGOs do you think are leaders in advancing sustainable development?

% of Global Experts, Unprompted, Total Mentions, 2015–2021



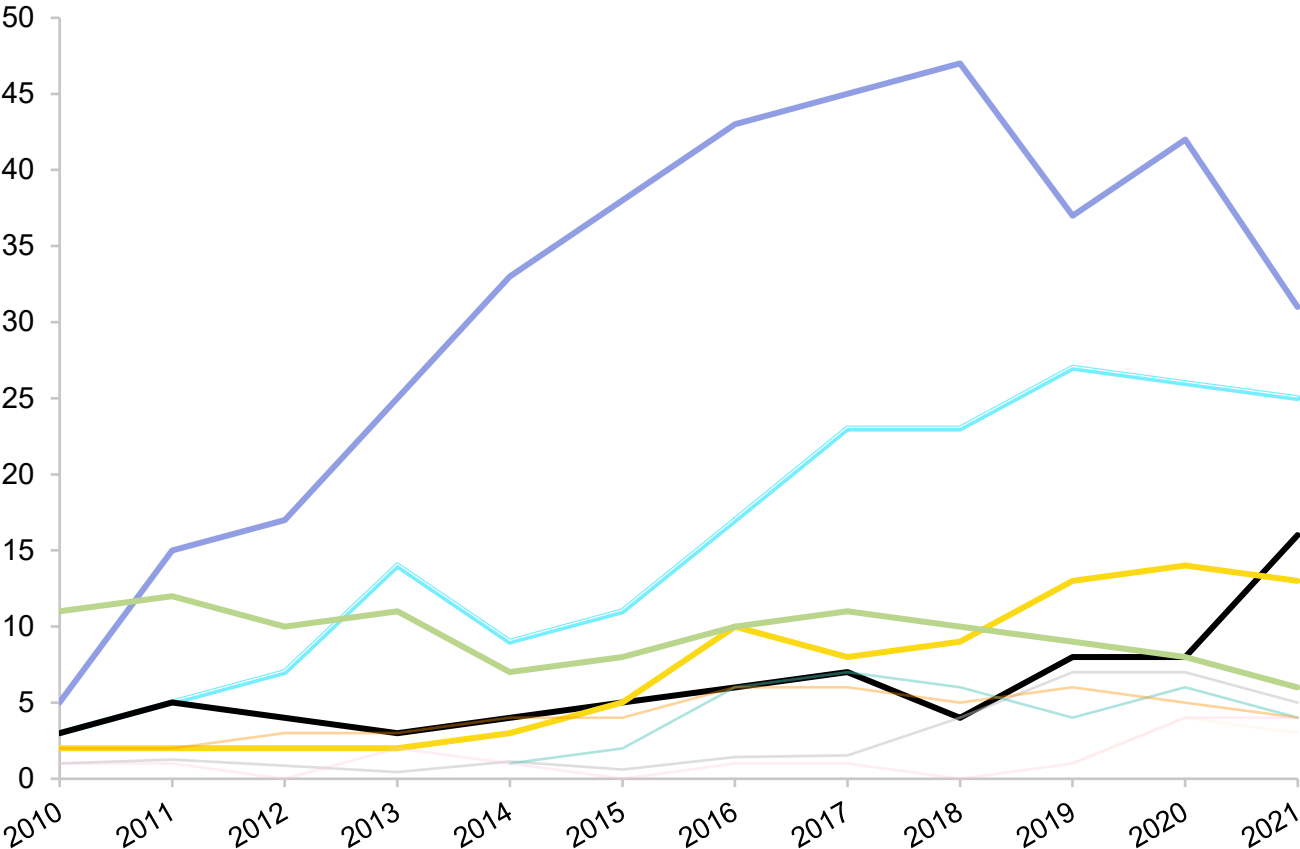
Unilever, Patagonia, Natura &Co, IKEA and Interface most recognized globally for their sustainability leadership, with narrowing leadership gap



Question

What specific companies do you think are leaders in integrating sustainability into their business strategy?

% of Experts, Unprompted, Total Mentions, 2010–2021



Revenue* (USD)

\$60bn (2020)



\$0.8bn (2019)

Natura &Co

\$7bn (2020)



\$44bn (2020)

Interface

\$1bn (2020)



*Annual revenue extracted from companies' latest financial reports.

















City Developments Limited and Tata Group most recognized as APAC-headquartered sustainability leaders among regional experts



Question

Which companies headquartered specifically in Asia-Pacific region do you think are leaders in integrating sustainability into their business strategy?

Top Mentions by Asia-Pacific experts, 2021

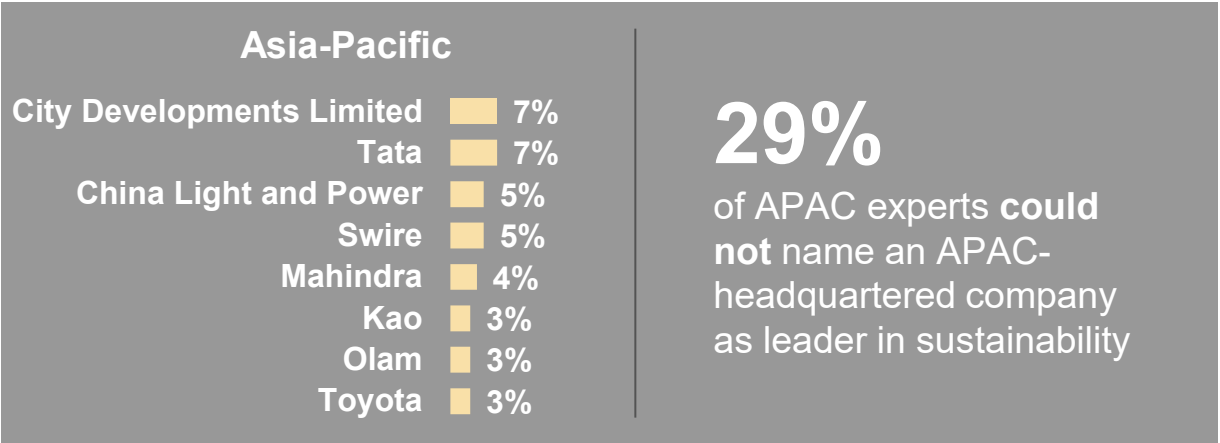
1	 CITY DEVELOPMENTS LIMITED	
2		
3	CLP  中電	
4	 SWIRE	
5	 Mahindra	
6		
7	 Olam	
8	 TOYOTA	

No Clear Sustainability Leader in APAC

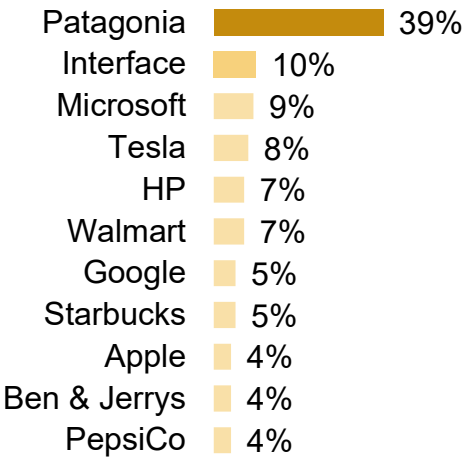


Question

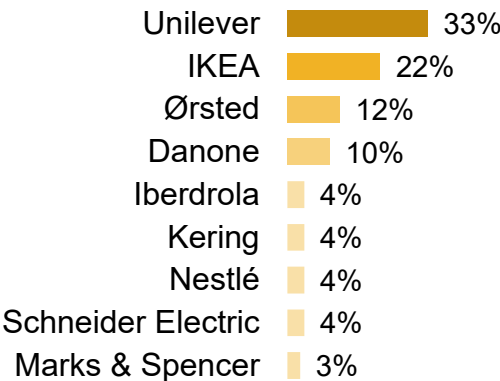
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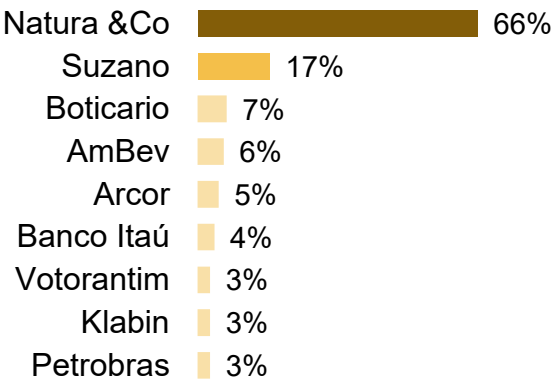
North America



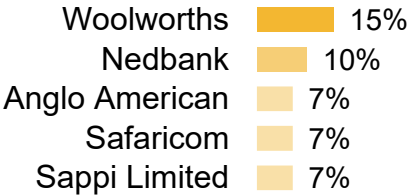
Europe



Latin America



Africa / Middle East

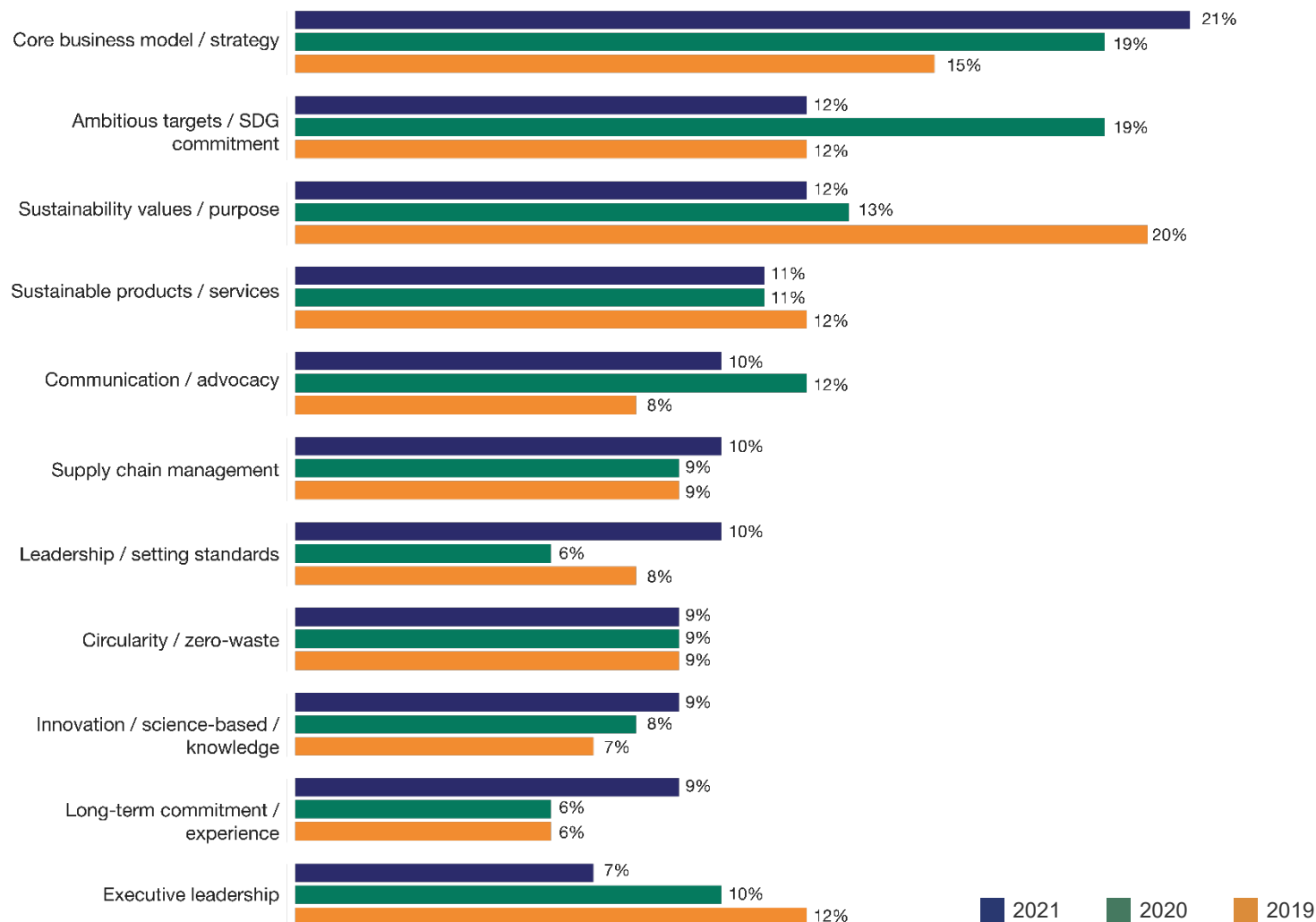


Strategic, Sustainable Business Models Drive Corporate Sustainability Leadership



Question

Why do you think
[company #1] is a leader
in sustainable
development?



% of Experts, Unprompted, Total Mentions, 2019–2021

Key Takeaways



Key Takeaways

Experts no longer believe that the COVID-19 pandemic will slow sustainability progress

The top corporate sustainability leaders have remained consistent over the last few years



Some new companies enter the ranking as more integrate sustainability into their core business models

In Asia corporate sustainability is varied - CDL and Tata are most recognized but no clear leader in the region

NGOs are perceived to be making the most significant contribution to advancing sustainable development

Northern European governments dominate positive perceptions of national sustainability leadership

Panelists



Esther An

Chief Sustainability Officer
City Developments Limited



Anirban Ghosh

Chief Sustainability Officer
Mahindra Group



Ken Haig

Head, Energy Policy,
Asia-Pacific & Japan
Amazon Web Services



Denise Westerhout

Specialist, Markets Practice
WWF International