CONSUMER MARKET STUDY ON

ENVIRONMENTAL CLAIMS

FOR NON-FOOD PRODUCTS

APPENDIX 1
Selection criteria and stakeholder consultation

Consumer market study on environmental claims for non-food products

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Introduction

One of the key tenets of the European Consumer Agenda[1] is that **consumers** should be **empowered, assisted and encouraged to make sustainable purchasing choices**. This will lead to cost savings for themselves and for society as a whole. For consumers to make sustainable choices, they need to have **clear and reliable information** in order to be able to easily identify the 'right' product or service to purchase. Information of this nature is provided by business by means of a range of environmental/green claims. The expressions **'environmental claims' or 'green claims'** refer to the practice of suggesting or otherwise creating the impression (in the context of a commercial communication, marketing or advertising) that **a product or a service, is environmentally friendly** (i.e. it has a positive impact on the environment) **or is less damaging to the environment than competing goods or services**. This may be due to, for example, its composition, the way it has been manufactured or produced, the way it can be disposed of and the reduction in energy or pollution which can be expected from its use.[2]

To unlock the untapped potential for green growth there are some key challenges ahead that need special attention.

- Consumers are confronted with an increasing number of environmental claims[3]
- While the interest in purchasing green products is high, the Eurobarometer from June 2011[4] also shows that consumer trust in environmental labelling has decreased.
- Cases of **misleading and unsubstantiated environmental claims** (e.g. 'greenwashing') in certain product markets have been reported by businesses, as well as by consumers and environmental NGOs. These undermine consumers' ability to contribute to green growth by means of their purchasing choices.
- Consumers not always truly understand the green claims they are confronted with[5]

In this context, the Consumers, Health and Food Executive Agency acting on behalf of European Commission (Directorate-General Health and Consumers) commissioned this **Consumer Market Study on environmental claims for non-food products**.

The **objective of the assignment** was to provide information on the current state of play on the presence of green claims in the Single Market for non-food markets, at the level of products (goods and services) and marketing strategies. It investigated the presence of green claims in consumer markets, and the different types of claims made e.g. general claims vs. more specific claims, self-declarations vs. verified claims, claim categories (general, climate, air, water etc.), explicit vs. implicit claims (marketing strategies that give a green impression through the use of colours, pictures, word-usage) etc. The assignment also examined the level of compliance with EU legal and regulatory requirements for a random selection of claims and assessed consumer understanding and behaviour vis-à-vis different types of green claims on the market. Furthermore, an analysis of the effectiveness of the enforcement and self-regulatory instruments available in selected countries was also part of this assignment. Lastly,

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[1] European Commission (2012). *A European Consumer Agenda - Boosting confidence and growth*. Retrieved from http://ec.europa.eu/consumers/strategy/docs/consumer_agenda_2012_en.pdf
[2] The working definition of 'environmental claims' used in this report is taken from the Guidance on the implementation/application of the Unfair Commercial Practices Directive (Commission Staff Working Document SEC (2009) 1666).
[3] - OECD (2011). *Environmental Claims - Findings and Conclusions of the OECD Committee on Consumer Policy*.
- DEFRA (2010). *Assessment of Green Claims on Product Packaging*.
- DEFRA (2010). *An assessment of green claims in marketing*.
- BEUC/ANEC position papers X/2011/067 of 14/12/11 and X/022/2011 of 28/02/11.
[4] European Commission (2011). *Attitudes of European citizens towards the environment*. Retrieved from http://ec.europa.eu/environment/pdf/ebs_365_en.pdf
[5] DEFRA. *Consumer understanding of green terms*, p. 6.

based on a thorough understanding of the current dynamics of green claims operating in key markets, the assignment provides policy recommendations for possible future EU policy initiatives in this field.

> In particular **Appendix 1** provides further information on the selection of the **30 products/services** and on the **stakeholder consultation** carried out.

The **criteria for** the **selection** of product/services to examine more in-depth under this study are:

- the impact that the product/service has on the consumer budget;
- the consumer perception of a given product/service;
- the environmental impact of the product/service;
- the existence of issues related to misleading claims in relation to a certain product/service;
- the presence of specific EU legislation with mandatory or voluntary information on environmental aspects for a certain product category.

These criteria are further detailed under section 2.

Furthermore, this appendix provides information on the **stakeholder surveys**. The stakeholder consultation was both conducted on an EU-level and on a national-level.

- In case of the **EU-level**, it majorly consisted of interviews with organisations representing the interests of all the sectors covered by the selected products for the study, consumer organisations, environmental NGOs and advertising associations.
- In case of the **national-level**, information was collected amongst stakeholders of relevant countries for each of the areas (all EU member states, and also Iceland, Norway and the USA).

The following **information** can be retrieved from the stakeholder questionnaires (section 3 and section 4):

- The overall methodology
    - o The questionnaire
    - o Data validation measures

The input provided by these stakeholders has been used throughout the study. Furthermore, it should be noted that next to this more general stakeholder consultation, based on a predefined questionnaire, additional stakeholder contacts were also carried out in order to receive an answer on specific questions related to guidelines, enforcement practices or requirements on certification and the availability of additional documents to assess "compliance" of claims against the UCPD and its guidance document.

1 Criteria applied for the selection of 30 products/services

The proposed goods and services to be mapped were identified from the experience of the tenderer as being the most relevant for such a study, in light of the proposed selection criteria:

- the impact the product/service has on the consumer budget;
- the consumer perception on a given product/service;
- the environmental impact of the product/service;
- the existence of issues related to misleading claims in relation to a certain product/service;
- the presence of specific EU legislation with mandatory or voluntary information on environmental aspects for a certain product category.

In addition to those presented in the tender, the project consortium also mapped rubbish bags and airlines. Household water utilities were also added to the mapping of public utilities. After discussions and comments from the Steering Group, the project is also including microwave ovens, coffee machines and irons in the mapping.

The starting point for this analysis is the sources as presented in the Technical tender. The goods and services were reviewed on the basis of available information on the selection criteria. The information was first detailed, in particular with regard to the statistical information. The qualitative and quantitative information was then inserted into a mapping template.

This section below presents the selection criteria used to map the proposed products. Each rating scheme is indicated and summarised at the end of this section as an overall mapping table.

1.1 Impact of the product on the consumers' budget

The baseline for the analysis of the given products and services on the consumers' budget was the analysis of the Mean consumption expenditure extracted from Eurostat on 15 January 2013[6]. The data is presented in Purchasing Power Standard (PPS) for corresponding Classification of Individual Consumption According to Purpose (COICOP)[7] products and services at EU level.

The table below presents the relationship between the proposed products and service and the COICOP.

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[6] Eurostat (2013). *Mean consumption expenditure by detailed COICOP level (in PPS)*. Retrieved from http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=hbs_exp_t121&lang=en
[7] United Nations Statistics Division. *COICOP (Classification of Individual Consumption According to Purpose)*. Retrieved from http://unstats.un.org/unsd/cr/registry/regcst.asp?Cl=5

Market sector	Product category	Corresponding COICOP
Consumer electronics	Mobile phones	08.2.0 Telephone and telefax equipment (D) – Purchases of telephones, radio-telephones, telefax machines, telephone-answering machines and telephone loudspeakers; – repair of such equipment. Excludes: telefax and telephone-answering facilities provided by personal computers (09.1.3).
	Personal computers	09.1.3 Information processing equipment (D) – Personal computers, visual display units, printers and miscellaneous accessories accompanying them; computer software packages such as operating systems, applications, languages, etc.; – calculators, including pocket calculators; – typewriters and word processors. Includes: telefax and telephone-answering facilities provided by personal computers. Excludes: pre-recorded diskettes and CDROMs containing books, dictionaries, encyclopaedias, foreign language trainers, multimedia presentations, etc. in the form of software (09.1.4); video game software (09.3.1); video game computers that plug into a television set (09.3.1); typewriter ribbons (09.5.4); toner and ink cartridges (09.5.4); slide rules (09.5.4).
	Light bulbs/lamps	05.5.2 Small tools and miscellaneous accessories (SD) – Hand tools such as saws, hammers, screwdrivers, wrenches, spanners, pliers, trimming knives, rasps and files; – garden tools such as wheelbarrows, watering cans, hoses, spades, shovels, rakes, forks, scythes, sickles and secateurs; – ladders and steps; – door fittings (hinges, handles and locks), fittings for radiators and fireplaces, other metal articles for the house (curtain rails, carpet rods, hooks, etc.) or for the garden (chains, grids, stakes and hoop segments for fencing and bordering); – small electric accessories such as power sockets, switches, wiring flex, electric bulbs, fluorescent lighting tubes, torches, flashlights, hand lamps, electric batteries for general use, bells and alarms; – repair of such articles.

	Televisions	*09.1.1 Equipment for the reception, recording and reproduction of sound and pictures (D)* *– Television sets, video cassette players and recorders, television aerials of all types;* *– radio sets, car radios, radio clocks, two-way radios, amateur radio receivers and transmitters;* *– gramophones, tape players and recorders, cassette players and recorders, CD-players, personal stereos, stereo systems and their constituent units (turntables, tuners, amplifiers, speakers, etc.), microphones and earphones.* *Excludes: video cameras, camcorders and sound-recording cameras (09.1.2).*
Household appliances	Washing machines Refrigerators Dishwashing machines Microwave ovens Irons	*05.3.1 Major household appliances whether electric or not (D)* *– Refrigerators, freezers and fridge-freezers;* *– washing machines, dryers, drying cabinets, dishwashers, ironing and pressing machines;* *– cookers, spit roasters, hobs, ranges, ovens and microwave ovens;* *– air-conditioners, humidifiers, space heaters, water heaters, ventilators and extractor hoods;* *– vacuum cleaners, steam-cleaning machines, carpet shampooing machines and machines for scrubbing, waxing and polishing floors;* *– other major household appliances such as safes, sewing machines, knitting machines, water softeners, etc.* *Includes: delivery and installation of the appliances when applicable.* *Excludes: such appliances that are built into the structure of the building (capital formation).*
	Coffee machines	*05.3.2 Small electric household appliances (SD)* *– Coffee mills, coffee-makers, juice extractors, can-openers, food mixers, deep fryers, meat grills, knives, toasters, ice cream makers, sorbet makers, yoghurt makers, hotplates, irons, kettles, fans, electric blankets, etc.* *Excludes: small non-electric household articles and kitchen utensils (05.4.0); household scales* *(05.4.0); personal weighing machines and baby scales (12.1.3).*

Textiles	Apparel (clothing)	*03.1.2 Garments (SD): Garments for men, women, children (3 to 13 years) and infants (0 to 2 years), either ready-to-wear or made-to-measure, in all materials (including leather, furs, plastics and rubber), for everyday wear, for sport or for work:* *- capes, overcoats, raincoats, anoraks, parkas, blousons, jackets, trousers, waistcoats, suits, costumes, dresses, skirts, etc.;* *- shirts, blouses, pullovers, sweaters, cardigans, shorts, swimsuits, tracksuits, jogging suits, sweatshirts, T-shirts, leotards, etc.;* *- vests, underpants, socks, stockings, tights, petticoats, brassières, knickers, slips, girdles, corsets, body stockings, etc.;* *- pyjamas, nightshirts, nightdresses, housecoats, dressing gowns, bathrobes, etc.;* *- baby clothes and babies' booties made of fabric.* *Excludes: articles of medical hosiery such as elasticated stockings (06.1.2); babies' napkins (12.1.3).*
	Carpet	*05.1.2 Carpets and other floor coverings (D) – Loose carpets, fitted carpets, linoleum and other such floor coverings. Includes: laying of floor coverings. Excludes: bathroom mats, rush mats and doormats (05.2.0); antique floor coverings acquired primarily as stores of value (capital formation).*
	Footwear	*03.2.1 Shoes and other footwear (SD)* *– All footwear for men, women, children (3 to 13 years) and infants (0 to 2 years) including sports footwear suitable for everyday or leisure wear (shoes for jogging, cross-training, tennis, basketball, boating, etc.).* *Includes: gaiters, leggings and similar articles; shoelaces; parts of footwear, such as heels, soles, etc., purchased by households with the intention of repairing footwear themselves.* *Excludes: babies' booties made of fabric (03.1.2); shoe-trees, shoehorns and*

		polishes, creams and other shoe-cleaning articles (05.6.1); orthopaedic footwear (06.1.3); gamespecific footwear (ski boots, football boots, golfing shoes and other such footwear fitted with ice-skates, rollers, spikes, studs, etc.) (09.3.2); shin-guards, cricket pads and other such protective apparel for sport (09.3.2).
Pulp and paper	Copying/graphic paper	*09.5.4 Stationery and drawing materials (ND)* *– Writing pads, envelopes, account books, notebooks, diaries, etc.;* *– pens, pencils, fountain pens, ballpoint pens, felt-tip pens, inks, erasers, pencil sharpeners, etc.;* *– stencils, carbon paper, typewriter ribbons, inking pads, correcting fluids, etc.;* *– paper punches, paper cutters, paper scissors, office glues and adhesives, staplers and staples, paper clips, drawing pins, etc.; – drawing and painting materials such as canvas, paper, card, paints, crayons, pastels and brushes.* *Includes: toner and ink cartridges; educational materials such as exercise books, slide rules, geometry instruments, slates, chalks and pencil boxes.* *Excludes: pocket calculators (09.1.3).*
Household cleaning products	All-purpose cleaners	*05.6.1 Non-durable household goods (ND)* *– Cleaning and maintenance products such as soaps, washing powders, washing liquids, scouring powders, detergents, disinfectant bleaches, softeners, conditioners, window cleaning products, waxes, polishes, dyes, unblocking agents, disinfectants, insecticides, pesticides, fungicides and distilled water;*
	Washing machine detergents	
	Dishwashing detergents	*– articles for cleaning such as brooms, scrubbing brushes, dustpans and dust brushes, dusters, tea towels, floorcloths, household sponges, scourers, steel wool and chamois leathers;* *– paper products such as filters, tablecloths and table napkins, kitchen paper, vacuum cleaner bags and cardboard tableware, including aluminium foil and plastic bin liners;* *– other non-durable household articles such as matches, candles, lamp wicks, methylated spirits, clothes-pegs, clothes hangers, pins, safety pins, sewing needles, knitting needles, thimbles, nails, screws, nuts and bolts, tacks, washers, glues and adhesive tapes for household use, string, twine and rubber gloves.* *Includes: polishes, creams and other shoe cleaning articles; fire extinguishers for households.* *Excludes: brushes and scrapers for paint, varnish and wallpaper (04.3.1); fire*

		extinguishers for transport equipment (07.2.1); products specifically for the cleaning and maintenance of transport equipment such as paints, chrome cleaners, sealing compounds and bodywork polishes (07.2.1); horticultural products for the upkeep of ornamental gardens (09.3.3); paper handkerchiefs, toilet paper, toilet soaps, toilet sponges and other products for personal hygiene (12.1.3); cigarette, cigar and pipe lighters and lighter fuel (12.3.2).
	Rubbish bags	*05.6.1 Non-durable household goods (ND)* *– Cleaning and maintenance products such as soaps, washing powders, washing liquids, scouring powders, detergents, disinfectant bleaches, softeners, conditioners, window cleaning products, waxes, polishes, dyes, unblocking agents, disinfectants, insecticides, pesticides, fungicides and distilled water;* *– articles for cleaning such as brooms, scrubbing brushes, dustpans and dust brushes, dusters, tea towels, floor cloths, household sponges, scourers, steel wool and chamois leathers;* *– paper products such as filters, tablecloths and table napkins, kitchen paper, vacuum cleaner bags and cardboard tableware, including aluminium foil and plastic bin liners;* *– other non-durable household articles such as matches, candles, lamp wicks, methylated spirits, clothes-pegs, clothes hangers, pins, safety pins, sewing needles, knitting needles, thimbles, nails, screws, nuts and bolts, tacks, washers, glues and adhesive tapes for household use, string, twine and rubber gloves.* *Includes: polishes, creams and other shoe cleaning articles; fire extinguishers for households.* *Excludes: brushes and scrapers for paint, varnish and wallpaper (04.3.1); fire extinguishers* *for transport equipment (07.2.1); products specifically for the cleaning and maintenance of* *transport equipment such as paints, chrome cleaners, sealing compounds and*

		bodywork *polishes (07.2.1); horticultural products for the upkeep of ornamental gardens (09.3.3); paper handkerchiefs, toilet paper, toilet soaps, toilet sponges and other products for personal hygiene (12.1.3); cigarette, cigar and pipe lighters and lighter fuel (12.3.2).*
Personal hygiene, beauty and baby products	Shampoos	NA
	Lipstick	*12.1.3 Other appliances, articles and products for personal care (ND)* *– Non-electric appliances: razors and hair trimmers and blades therefor, scissors, nail files, combs, shaving brushes, hairbrushes, toothbrushes, nail brushes, hairpins, curlers personal weighing machines, baby scales, etc.;* *– articles for personal hygiene: toilet soap, medicinal soap, cleansing oil and milk, shaving soap, shaving cream and foam, toothpaste, etc.;* *– beauty products: lipstick, nail varnish, makeup and make-up removal products (including powder compacts, brushes and powder puffs), hair lacquers and lotions, pre-shave and after-shave products, sunbathing products, hair removers, perfumes and toilet waters, personal deodorants, bath products, etc.;* *– other products: toilet paper, paper handkerchiefs, paper towels, sanitary towels, cotton wool, cotton tops, babies' napkins, toilet sponges, etc. Excludes: handkerchiefs made of fabric (03.1.3).*
	Hand soap	
	Toothpaste	
	Skin creams	
	Baby bottles	NA
	Baby diapers	NA
	Toilet paper	*12.1.3 Other appliances, articles and products for personal care (ND)* *– Non-electric appliances: razors and hair trimmers and blades therefor, scissors, nail files, combs, shaving brushes, hairbrushes, toothbrushes, nail brushes, hairpins, curlers personal weighing machines, baby scales, etc.;* *– articles for personal hygiene: toilet soap, medicinal soap, cleansing oil and milk, shaving soap, shaving cream and foam, toothpaste, etc.;* *– beauty products: lipstick, nail varnish, makeup and make-up removal products (including powder compacts, brushes and powder puffs), hair lacquers and lotions, pre-shave and after-shave products, sunbathing products, hair removers, perfumes and toilet waters, personal deodorants, bath products, etc.;*

		– other products: toilet paper, paper handkerchiefs, paper towels, sanitary towels, cotton wool, cotton tops, babies' napkins, toilet sponges, etc. Excludes: handkerchiefs made of fabric (03.1.3).
Housing/building materials & DIY)	Paints and varnishes	*04.3.1 Materials for the maintenance and repair of the dwelling (ND) – Products and materials, such as paints and varnishes, renderings, wallpapers, fabric wall coverings, window panes, plaster, cement, putty, wallpaper pastes, etc., purchased for minor maintenance and repair of the dwelling. Includes: small plumbing items (pipes, taps, joints, etc.), surfacing materials (floorboards, ceramic tiles, etc.) and brushes and scrapers for paint, varnish and wallpaper. Excludes: fitted carpets and linoleum (05.1.2); hand tools, door fittings, power sockets, wiring flex and lamp bulbs (05.5.2); brooms, scrubbing brushes, dusting brushes and cleaning products (05.6.1); products, materials and fixtures used for major maintenance and repair (intermediate consumption) or for extension and conversion of the dwelling (capital formation).*
	Windows	
	Hardwood floors	
	Toilets	*05.4.0 Glassware, tableware and household utensils (SD) – Glassware, crystal ware, ceramic ware and china ware of the kind used for table, kitchen, bathroom, toilet, once and indoor decoration; – cutlery, flatware and silverware;* *– non-electric kitchen utensils of all materials such as saucepans, stew pots, pressure cookers, frying pans, coffee mills, purée makers, mincers, hotplates, household scales and other such mechanical devices; – non-electric household articles of all materials such as containers for bread, coffee, spices, etc., waste bins, waste-paper baskets, laundry baskets, portable money boxes and strongboxes, towel rails, bottle racks, irons and ironing boards, letter boxes, feeding bottles, thermos flasks and iceboxes; – repair of such articles. Excludes: lighting equipment (05.1.1); electric household appliances (05.3.1) or (05.3.2); cardboard tableware (05.6.1); personal weighing machines and baby scales (12.1.3); ashtrays (12.3.2).*
	Showerheads	NA

Transport	Passenger vehicles	*07.1.1 Motor cars (D)* *– Motor cars, passenger vans, station wagons, estate cars and the like with either two-wheel drive or four-wheel drive.* *Excludes: invalid carriages (06.1.3); camper vans (09.2.1); golf carts (09.2.1).*
	Tyres	*07.2.1 Spare parts and accessories for personal transport equipment (SD)* *– Tyres (new, used or retreaded), inner tubes, spark plugs, batteries, shock absorbers, filters, pumps and other spare parts or accessories for personal transport equipment.* *Includes: fire extinguishers for transport equipment; products specifically for the cleaning and maintenance of transport equipment such as paints, chrome cleaners, sealing compounds and bodywork polishes; covers for motor cars, motorcycles, etc.* *Excludes: crash helmets for motorcycles and bicycles (03.1.3); non-specific products for cleaning and maintenance such as distilled water, household sponges, chamois leathers, detergents, etc. (05.6.1); charges for the fitting of spare parts and accessories and for the painting, washing and polishing of bodywork (07.2.3); radio-telephones (08.2.0); car radios (09.1.1); baby seats for cars (12.3.2).*
Tourism accommodation services	Hotels/campsites/B&Bs	*11.2.0 Accommodation services (S)* *– Accommodation services of:* *- hotels, boarding houses, motels, inns and establishments offering ''bed and breakfast'';* *- holiday villages and holiday centres, camping and caravan sites, youth hostels and mountain chalets;* *- boarding schools, universities and other educational establishments;* *- public transport (trains, boats, etc.) when priced separately;* *- hostels for young workers or immigrants. Includes: tips, porters.* *Excludes: payments of households occupying a room in a hotel or boarding house as their main residence (04.1.1); rentals paid by households for a secondary residence for the duration of a holiday (04.1.2); telephone calls (08.3.0); catering services in such establishments except for breakfast or other meals included in the price of the accommodation (11.1.1); housing in orphanages, homes for disabled or maladjusted persons (12.4.0).*

Financial services	Investment products	*12.6.2 Other financial services n.e.c. (S)* *– Actual charges for the financial services of banks, post offices, saving banks, money changers and similar financial institutions;* *– fees and service charges of brokers, investment counsellors, tax consultants and the like;* *– administrative charges of private pension funds and the like.*
Public utilities	Household electricity services	NA
	Household water utilities	NA
Public transport	Airlines	07.3.3 Passenger transport by air (S) – Transport of individuals and groups of persons and luggage by aeroplane and helicopter.

The table below presents the PPS for each of the relevant COICOP data for 2005.

MS	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK
08.2.0 Telephone and telefax equipment	28	42	12	42	16	:	19	52	6	21	45	42	87	31	16	98	19	139	37	29	8	24	4	33	11	61	61	53
09.1.3 Information processing equipment	68	143	12	68	206	:	64	96	43	81	93	29	108	73	53	273	39	177	212	177	29	88	7	94	49	170	186	113
05.5.2 Small tools and miscellaneous accessories	63	116	9	39	111	:	30	194	33	33	103	70	57	24	22	105	22	159	214	103	18	13	:	11	23	88	174	126
09.1.1 Equipment for the reception, recording and reproduction of sound and pictures	78	127	19	82	200	:	49	91	83	79	93	94	127	66	35	206	60	145	192	172	40	50	16	59	45	193	195	126
05.3.1 Major household appliances whether electric or not	147	194	45	139	198	155	113	169	203	178	186	99	348	106	74	373	90	449	154	205	76	124	34	234	74	185	209	190
03.1.2 Garments	1,02	1,05	146	477	859	1	375	1,44	1,48	1,35	1,46	1,25	1,93	495	471	2,66	360	1,71	1,28	1,25	326	613	195	1,24	415	700	1,01	1,18
05.1.2 Carpets and other floor coverings	46	28	6	34	45	:	10	82	37	7	13	25	24	:	11	120	10	57	50	35	14	12	9	24	18	33	52	258
03.2.1 Shoes and other footwear	287	267	66	159	229	248	181	338	539	383	326	428	589	230	234	589	157	573	306	333	139	204	129	359	216	150	185	307
09.5.4 Stationery and drawing materials	33	81	9	18	29	:	21	100	46	42	54	36	79	15	19	116	27	171	48	76	21	29	:	45	18	21	33	51
12.1.3 Other appliances, articles and products for personal care	285	310	120	268	322	:	164	828	638	263	348	463	606	218	197	180	199	742	390	428	219	302	103	372	232	287	311	437
05.6.1 Non-durable household goods	201	280	79	164	176	105	90	300	445	280	219	271	422	99	108	351	200	583	196	264	142	222	90	362	165	169	173	223
04.3.1 Materials for the maintenance and repair of the dwelling	122	287	74	138	197	:	148	706	123	38	148	:	49	87	69	475	127	456	297	342	240	30	35	106	265	2	0	160
05.4.0 Glassware, tableware and household utensils	90	111	14	64	129	109	38	159	223	42	78	168	209	39	32	89	24	156	114	124	32	34	9	77	28	98	:	113
07.1.1 Motor cars	893	1,29	35	388	1,28	:	232	1,94	1,2	1,1	1,71	819	2,34	242	45	4,82	590	2,17	1,04	2,07	188	958	42	1,7	214	1,68	1,59	1,64
07.2.1 Spare parts and accessories for personal transport equipment	91	115	21	67	122	:	72	136	213	26	114	208	13	80	44	501	40	238	112	231	33	76	15	127	42	184	178	142
11.2.0 Accommodation services	178	349	14	83	167	:	12	590	137	160	111	501	174	9	12	858	20	344	399	30	20	72	21	253	40	131	78	386
12.6.2 Other financial services	33	79	2	72	52	:	5	49	8	7	95	:	6	26	5	91	9	67	198	:	7	6	9	56	44	4	23	25
07.3.1 Passenger transport by railway	67	92	7	31	:	:	5	74	17	24	181	42	:	43	4	45	31	66	219	46	36	36	8	31	35	68	78	144
07.3.3 Passenger transport by air	57	47	3	5	105	:	23	152	53	43	90	84	279	6	9	211	3	473	:	10	7	77	1	16	11	99	34	173
05.3.2 Small electric household appliances	19	20	5	27	27	:	10	33	9	14	26	34	22	10	7	62	10	131	35	55	8	11	5	26	11	17	24	36
05.4.0 Glassware, tableware and household utensils	90	111	14	64	129	109	38	159	223	42	78	168	209	39	32	89	24	156	114	124	32	34	9	77	28	98	:	113
05.6.1 Non-durable household goods	201	280	79	164	176	105	90	300	445	280	219	271	422	99	108	351	200	583	196	264	142	222	90	362	165	169	173	223

The share of the products and services in the consumers' basket composed solely of those products and services was calculated. These percentages were then ranked and the following rating was used in the mapping table.

COICOP product	Corresponding products and services	Average PPS (E)	Ranking*	Rating*
05.3.2 Small electric household appliances	Coffee machines	19	0%	--
08.2.0 Telephone and telefax equipment	Mobile phones	28	1%	--
09.5.4 Stationery and drawing materials	Copying/graphic paper	33	1%	--
12.6.2 Other financial services	Consumer Investments[8]	33*	1%	--
05.1.2 Carpets and other floor coverings	Carpets	46	1%	--
07.3.3 Passenger transport by air	Airlines	57	1%	--
05.5.2 Small tools and miscellaneous accessories	Light bulbs/lamps	63	2%	--
09.1.3 Information processing equipment	Personal computers	68	2%	--
09.1.1 Equipment for the reception, recording and reproduction of sound and pictures	Televisions	78	2%	--
05.4.0 Glassware, tableware and household utensils	Toilets Plastic bags	90*	2%	--
07.2.1 Spare parts and accessories for personal transport equipment	Tyres	91	2%	--
04.3.1 Materials for the maintenance and repair of the dwelling	Paints and varnishes, windows, hardwood floors	122	3%	--
05.3.1 Major household appliances whether electric or not	Washing machines, refrigerators, dishwashing machines, irons, microwave oven	147	4%	--

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[8] Credit cards, pensions/retirement savings, saving accounts, etc. excluded.

11.2.0 Accommodation services	Hotels	178	5%	-
05.6.1 Non-durable household goods	All-purpose cleaners, washing machine detergents, dishwashing detergents	201	5%	-
12.1.3 Other appliances, articles and products for personal care	Lipstick, Hand soap, toothpaste, skin cream, toilet paper	285*	7%	-
03.2.1 Shoes and other footwear	Shoes	287	8%	-
07.1.1 Motor cars	Passenger vehicles	893	23%	+
03.1.2 Garments	Apparel (clothing)	1,024	27%	+
Total PPS		***3810*[9]***		

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[9] * Figures to be verified and updated.

1.2 Consumer perception of markets

The baseline for consumer perception of markets is the Market Performance Index as per the 2012 "Monitoring Consumer Markets in the European Union"[10]. We have chosen to create a 3/5-level ranking scale in order to present the consumer's perception of the performance of the market *relative* to that of other markets. The rating is separate for products and services as in the reference study.

The overall ranking of all the products and services studied is presented in the figure below.

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[10] GfK (2012). *Monitoring Consumer Markets in the European Union*. Retrieved from http://ec.europa.eu/consumers/consumer_research/editions/docs/monitoring_consumer_markets_eu_2012_en.pdf

EU27 - nMPI

	EU27 - nMPI	diff 2012 - 2011	2012	2011	2010
G O O D S	books, magazines and newspapers	103,7	-0,6	1	1	1
	non-alcoholic drinks	102,8	0,0	2	2	3
	bread, cereals, rice and pasta	102,6	0,4	3	5	2
	spectacles and lenses	102,0	-0,4	4	3	
	small household appliances	101,9	0,4	5	7	6
	large household appliances	101,6	0,6	6	10	7
	entertainment goods	101,6	0,0	7	6	11
	dairy products	101,5	-0,9	8	4	
	alcoholic drinks	101,2	0,2	9	9	4
	electronic products	101,1	0,5	10	11	8
	personal care products	101,0	-0,5	11	8	5
	furniture and furnishings	100,3	0,4	12	13	12
	maintenance products	100,2	0,4	13	14	15
	non prescription medicines	99,9	-0,4	14	12	9
	fruit and vegetables	99,4	0,4	15	15	13
	ICT products	98,9	0,3	16	16	14
	meat and meat products	98,8	0,4	17	18	17
	new cars	98,5	-0,1	18	17	16
	clothing and footwear	97,1	-0,3	19	19	19
	fuel for vehicles	93,8	-1,2	20	20	18
	second hand cars	92,0	0,2	21	21	20
S E R V I C E S	personal care services	107,7	-0,4	1	1	1
	culture and entertainment	106,6	-0,4	2	2	2
	commercial sport services	105,4	-0,2	3	3	3
	holiday accommodation	105,0	0,3	4	4	4
	airline services	104,2	-0,1	5	6	7
	cafés, bars and restaurants	103,8	-0,5	6	5	9
	packaged holidays & tours	103,6	0,3	7	7	11
	gambling and lottery services	102,9	0,5	8	10	12
	vehicle insurance	102,1	-0,6	9	9	13
	vehicle rental services	101,8	-0,9	10	8	10
	home insurance	101,2	-0,4	11	12	15
	postal services	100,6	-1,7	12	11	8
	tram, local bus, metro	99,9	-1,5	13	13	14
	vehicle maintenance and repair	99,5	0,3	14	17	18
	fixed telephone services	99,4	0,3	15	18	22
	legal and accountancy services	99,1	-0,2	16	15	
	water supply	99,0	-0,3	17	14	16
	maintenance services	98,8	0,4	18	19	21
	loans, credit and credit cards	98,4	0,4	19	21	
	TV-subscriptions	98,4	3,2	20	27	
	gas services	98,4	-0,9	21	16	19
	private life insurance	97,8	-0,4	22	20	
	internet provision	97,6	1,4	23	24	28
	mobile telephone services	97,1	0,5	24	23	25
	bank accounts	96,8	-0,1	25	22	24
	electricity services	96,3	0,6	26	25	23
	train services	95,7	0,5	27	26	27
	real estate services	94,7	0,2	28	29	29
	mortgages	94,6	-0,3	29	28	
	investment products, private pensions and…	93,6	-0,1	30	30	30

The definition of each product category is presented hereunder.

Market for clothing and footwear

Market definition: Clothing (including tailor-made goods) and footwear - Children's clothing, Women's clothing, Men's clothing, Sportswear, Hats, Clothing material, Furs, Protective clothing, Handbags and accessories, Children's footwear, Women's footwear, Men's footwear, Sports footwear, Other.

The clothing and footwear market has a normalised MPI score of 97.1, which means a small decrease of 0.3 points compared to 2011. It is ranked 19th out of 21 goods markets three years in a row. Therefore, the market for clothing and footwear can be defined as an underperforming market.

2012 EU 27 MPI: 97.1

Market for furniture and furnishings

Market definition: Furnishings Furniture (Upholstered furniture Non-upholstered furniture Beds and mattresses Kitchen furniture Fitted furniture Bathroom fittings Antiques Leather furniture Cots High chairs Other nursery furniture Garden furniture Other) Floor Coverings (Carpets Mats and rugs Laminates Ceramics Wood Linoleum Underlay Other) Household textiles (Bedding Cushions Curtains and blinds Furniture fabrics Other) Glassware, tableware and household utensils (Crockery Cooking and dining utensils Glassware Other)

The market for furniture and furnishings has a normalised MPI score of 100.3, indicating that this market is performing slightly below the average of all goods markets. The furniture and furnishings market comes 12th out of 21 goods markets, with no major differences from last year in terms of scores or ranking. Therefore, this market is relatively unchanged since 2011.

2012 EU 27 MPI: 100.3

Market for electronic products

Market definition: Electronic goods (Non ICT/recreational) DVD players-recorders VCRs TVs CD HI-FI media players non- portable CD, HI-FI, media players portable Radios Cameras Video cameras Photographic equipment CDs (blank) DVDs (blank) Audio and video tapes (blank) Other

The market for electronic products has a normalised MPI score of 101.1, indicating that this market is performing above the average of all goods markets. The electronic products market comes 10th out of 21 goods markets, with no major differences from last year in terms of scores or ranking. Therefore, this market is relatively unchanged since 2011.

2012 EU 27 MPI: 101.1

Market for large household appliances

Market definition: Large domestic appliances Electronic cookers Fridges and freezers Washing machines Tumble dryers Washer-dryers (combined) Dishwashers Space heaters Fixed heaters Vacuum cleaners Microwave ovens Sewing machines Portable heating appliances Other

The large household appliances market has a normalised MPI score of 101.6, and is therefore assessed better than the average goods markets sector. Its score has increased by 0.6 since 2011, and its current ranking of 6th within the goods markets sector is above its 2011 ranking of 10th and even its 2010 ranking of 7th.

2012 EU 27 MPI: 101.6

Market for small household appliances

Market definition: Small domestic household appliances Food-processing appliances Coffee machines Irons Toasters Grills Other

The small household appliances market has a normalised MPI score of 101.9, and is therefore performing better than the average goods markets sector. Its score has increased by 0.4 since 2011, and its current ranking of 5th within the goods markets sector is above its 2011 ranking of 7th and even its 2010 ranking of 6th. Several MPI component scores have experienced a large improvement since 2011: comparability,

trust, expectations and choice. For the comparability and choice components, we see higher scores than the EU Countries average.

2012 EU 27 MPI: 101.9

Market for ICT products

Market definition: Information Communication Technology Goods (ICT) Personal computers Self-built computers Computer accessories Printers and scanners Games consoles Portable Games players Computer software Computer software upgrades Laptops, notebooks and tablet PCs, PDA's and smart phones Mobile phone devices Fixed phone devices Moderns Decoders Other

The market of ICT products has a normalised MPI score of 98.9 and ranks 16th in the goods market ranking, which is a stable result in comparison with the previous years.

2012 EU 27 MPI: 98.9

Market for new cars

Market definition: New cars

The market for new cars is the 4th lowest scoring market in the goods ranking (18th position) with an nMPI score of 98.5, which is close to its position in 2010 (16th) and 2011 (17th).

2012 EU 27 MPI: 98.5

Market for maintenance products

Market definition: House maintenance and improvement goods - DIY materials (excluding paint and wall coverings), Paint, Wall coverings, Fence, Shed, Power tools (e.g. drill chainsaw), Non-electrical tools, Gardening equipment/tools (non-electrical), Lawn movers, others

Maintenance products have a normalised MPI score of 100.2, meaning that it is close to average in terms of consumer goods market performance. Its score has increased by 0.4 since 2011, and its ranking within the goods markets has steadily increased over the past three years, from 15th position in 2010, to 14th place in 2011 and 13th place this year.

2012 EU 27 MPI: 100.2

Market for personal care products

Market definition: Personal care - Toiletries & Electrical appliances Cosmetics Toiletries (including diapers) Wigs Hair care products Perfumes Electric razors and hair trimmers Hair dryers curling tongs and styling combs other

With a normalised MPI score of 101.0 the market for personal care products is performing above the average of all goods markets. However, the market shows a slight decrease in score of 0.5 points and shifted slightly downward from the 8th to the 12th place in the overall ranking.

2012 EU 27 MPI: 101.0

Market for bank accounts

Market definition: Banking-Current account Debit cards

The market for bank accounts is in 25th position in the services ranking, with a nMPI of 96.8, which is close to its 22nd position in 2011 and in line with the position it had in 2010 (24th).

2012 EU 27 MPI: 96.8

Market for holiday accommodation

Market definition: Hotels and other holiday accommodation Hotels Other holidays accommodation (e.g. bed &breakfast, youth hostel) Caravan sites Camp sites

The market for holiday accommodation performs significantly above the average for services markets. It has an nMPI score of 105.0, which has increased slightly by 0.3 since 2011. It has been the 4th ranked services markets market for the past 3 years.

2012 EU 27 MPI: 105.0

Market for electricity services

Market definition: Electricity

The market for electricity services has an nMPI of 96.3, which has increased by 0.6 points since 2011. Its ranking among services markets is currently 26th, which is again

a decrease in the ranking with one position after this market already fell two positions between 2010 and 2011. While the nMPI score increases, the ranking of this market decreased, which indicates that the increase in score is slower than that of other services markets.

2012 EU 27 MPI: 96.3

Market for airline services

Market definition: Airlines

The airline services market scores 104.2 for its normalised MPI and ranks 5th among services markets. This result is comparable to its ranking in previous years. A slight increase in ranking can be seen over the years, coming from a 7th position in 2010 up to a 6th position in 2011 and now in 5th position. The trust component has increased slightly since last year, although not significantly. The choice component assessment is less positive than last year, but this change is not statistically significant. In contrast, the comparability, trust and expectations scores are above average, indicating that consumers feel they can easily compare offers between different airlines.

2012 EU 27 MPI: 104.2

Market for water supply

Market definition: Water Supply

With an nMPI score of 99.0 points, the market for water supply is performing slightly below the services markets average. Its score has dropped slightly by 0.3 points since 2011, although its ranking has been quite stable over the last three years - 16th in 2010, 14th in 2011 and 17th in 2012. In terms of component scores, its scores are almost completely unchanged since 2011. It is assessed close to the services markets average for all components except comparability, where its score is below the average. This is due to the fact that water supply is a monopoly markets in a number of countries - hence the reason why the choice component is not asked for this market.

2012 EU 27 MPI: 99.0

The table below presents a summary of the corresponding sectors analysed in the "Monitoring Consumer Markets in the European Union" and the proposed product categories for the current study as well as the given rating.

The rating can corresponds to the following ranking of the 21 products and 30 services analysed in the study as follows:

Rating	Products	Services
++	1-5	1 – 7
+	6-10	8 – 14
-	11-16	15 – 22
--	17-21	23 - 30

Market sector	Product category	Corresponding studied market	Ranking of the studied market	Rating
Consumer electronics	Mobile phones	NA		
	Laptops	ICT products	16	-
	Light bulbs/lamps	NA		
	Televisions	Electronic	10	+

		products		
Household appliances	Washing machines	Large household appliances	6	+
	Refrigerators			
	Dishwashers			
	Microwave ovens			
	Coffee machines	Small household appliances	5	++
	Irons			
Textiles	Clothing	Clothing and footwear	19	--
	Footwear			
	Carpet	Furniture and furnishing	12	-
Pulp paper	Copying/graphic paper	NA		
Household cleaning and storage products	All-purpose cleaners	NA		
	Washing machine detergents	NA		
	Dishwashing detergents	NA		
	Rubbish bags	NA		
Personal hygiene, beauty & baby products	Shampoos	Personal care products	11	-
	Lipstick			
	Hand soap			
	Toothpaste			
	Skin creams			
	Baby bottles			
	Baby diapers			
	Toilet paper			
Housing/building materials	Paints	Maintenance products	13	-
	Glass for Window	NA		
	Hardwood floors	Maintenance products	13	-

	Toilets	NA		
	Showerheads	NA		
Personal transport	Passenger vehicles	New cars	18	-
	Tyres	NA		
	Airlines	Airline services	5	++
Tourism accommodation services	Hotels	Holiday accommodation	4	++
Utilities	Household electricity services	Electricity services	26	--
	Household water utilities	Water supply	17	-
Financial services	Consumer investment products (excl. pensions & securities & savings)	Investment products, private pensions and securities	30	--

1.3 Environmental impact of the product/market

The following studies were reviewed in detail to identify those product groups and markets with an important environmental impact:

- JRC (2006) Environmental impact of products
- UNEP (2010) Assessing the environmental impacts of consumption and production: Priority products and materials
- JRC (2011) Analysis of the future application of product policy instruments in the EU

Below a brief summary of the studies reviewed is provided, including an indication of products which each identified as having important environmental impacts.

The landmark *2006 European study on the environmental impact of products (EIPRO)[11]* identifies products in the following areas as having the greatest impact:

- Food and drink
- Private transport
- Housing

These three areas are responsible for an estimated 70 to 80% of the environmental impact of consumption and 60% of consumption expenditure. All remaining areas of private consumption account for an estimated 20 to 30% of environmental impacts; of these consumption areas, clothing ranks the highest.

Within the food and drink area, meat and meat products have the most important impacts, followed by dairy. Within the private transport area the greatest impact is from cars. Within the housing area, energy is the most important factor, primarily for room and water heating, followed by structural work (new construction, maintenance, repair, and demolition) and energy-using domestic appliances.

A *2010 UNEP study on the environmental impacts of consumption and production[12]* identifies a list of priority products and materials. The study considers environmental impacts from three perspectives:

From a production perspective the following economic activities have the most environmental impacts:

- Processes involving fossil fuel combustion (especially electrical utilities)
- Agriculture and biomass using activities
- Fisheries

From a consumption perspective the following consumption clusters have the most environmental impacts:

- Food
- Housing
- Mobility
- Manufactured products (particularly electrical appliances)

From a *materials perspective* the following resource categories have the most environmental impacts:

Fossil fuel extraction

Agricultural materials, especially animal products

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[11] JRC (2006). *Environmental impact of products*.
[12] UNEP (2010). *Assessing the environmental impacts of consumption and production: Priority products and materials*.

Extracting and refining materials that are used for their structural or material properties (not as an energy source)

The **2011 JRC IPTS study on the future application of product policy instruments in the EU**[13] prioritises a number of products based on their impacts for various environmental impacts:

- Energy use
- Material use
- Biotic material use
- Water use
- Hazardous content
- Waste

The box below shows the final prioritised list; it should be noted that the one through fifteen numbering does not represent an ordered ranking.

Box 0.1: Selected / prioritized products

Related to energy use(water using ErPs mentioned under water)
1. Housing indirect ErPs (example product: windows)
2. Goods road motor transport (vans or trucks)
3. Tyres (also relevant for waste and material consumption)
4. Passenger air transport

Related to material use
5. Housing – cement, plaster and mortar
6. Housing – floor and wall covering[1]
7. Building occupancy – Brown goods (also given the relevance for energy use)

Related to biotic resource consumption
8. Housing – building materials for wood
9. Food – Meat (also relevant for water)
10. Food – Cereals and crops (also relevant for water)
11. Food – fish (in which we included aquaculture)
12. Other – paper products

Related to water consumption (with Meat / Cereals and crops already covered under biotic resource consumption)
13. Building occupancy – sanitary ware and tapware (in part also relevant for energy)
14. Textiles: textiles made from natural fibres[2].

Other:
15. Detergents (indirect Energy related product, and potentially relevant for hazardous content)

A European Commission study which provides support to an impact assessment of a new proposal on the measurement of the environmental performance of products[14] includes an analysis of product groups based on their environmental impact. The

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[13] JRC (2011). *Analysis of the future application of product policy instruments in the EU*.
[14] EC (to be published in end 2012) *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products*.

product groups with the highest contribution to overall environmental impacts in the EU are listed below; in each case +++ indicates high environmental impact while ++ indicates medium environmental impact:

- Food (+++)
- Construction materials (+++)
- Cars (+++)
- Computers (++)
- White goods (++)
- Clothing (++)
- Paper (++)
- Cleaning products (++)
- Tourist accommodation services (++)

Based on the literature sources examined, the following rating system has been applied to the proposed list of market sectors and products:

Meaning	Basis of rating
High environmental impact	Indicated as a priority product
Medium environmental impact	Indicated as part of a priority product group, or mentioned specifically as a secondary product

Those products receiving a rating of "high" in terms of environmental impact were specifically indicated within a priority product group (e.g. passenger vehicles within the transport market sector) and were typically mentioned in multiple studies. Those products receiving medium environmental impact were either not directly mentioned but fall within a product group identified as priority (e.g. paints and varnishes within the building/housing market sector) or were directly identified in the studies examined, but as contributing at a less important level to environmental impacts (e.g. personal computers in the consumer electronics market sector). The prioritisation and ranking lists resulting from each study, as well as rating, are presented in detail below.

Market sector	Product category	Environmental impact	Source	Rating
Consumer electronics	Mobile phones	Related to consumption	UNEP (2010)	High
	Laptops	Related to consumption, general impact	UNEP (2010); EC (2012)	Medium
	Light bulbs/lamps	Related to consumption; material use	UNEP (2010); JRC (2011)	High
	Televisions	General impact; related to	JRC (2006); UNEP	High

		consumption	(2010)	
Household appliances	Washing machines	General impact; related to consumption	JRC (2006); UNEP (2010); EC (2012)	High
	Refrigerators	General impact; related to consumption	JRC (2006); UNEP (2010); EC (2012)	High
	Dishwashers	General impact; related to consumption	JRC (2006); UNEP (2010); EC (2012)	High
	Microwave ovens	General impact; related to consumption; material use	JRC (2006); UNEP (2010); JRC (2011)	High
	Coffee machines	General impact; related to consumption; material use	JRC (2006); UNEP (2010); JRC (2011)	High
	Irons	General impact; related to consumption; material use	JRC (2006); UNEP (2010); JRC (2011)	High
Textiles	Clothing	General impact; water consumption for those made with natural fibres	JRC (2006); JRC (2011); EC (2012)	Medium
	Footwear	NA	NA	NA
	Carpet	General impact; material use	JRC (2006); JRC (2011)	High
Pulp paper	Copying/graphic paper	Biotic resource consumption; general impact	JRC (2011); EC (2012)	Medium
Household	All-purpose cleaners	General impact	EC (2012)	Medium

cleaning and storage products	Washing machine detergents	Indirect energy use, hazardous content	JRC (2011)	High
	Dishwashing detergents	Indirect energy use, hazardous content	JRC (2011)	High
	Rubbish bags	NA	NA	NA
Personal hygiene, beauty & baby products	Shampoos	NA	NA	NA
	Lipstick	NA	NA	NA
	Hand soap	NA	NA	NA
	Toothpaste	NA	NA	NA
	Skin creams	NA	NA	NA
	Baby bottles	NA	NA	NA
	Baby diapers	NA	NA	NA
	Toilet paper	Biotic resource consumption	JRC (2011)	Medium
Housing/building materials	Paints	Related to consumption; material use	UNEP (2010); JRC (2011); EC (2012)	Medium
	Glass for Window	Related to consumption ; general impact; energy use	UNEP (2010); JRC (2006); JRC (2011); EC (2012)	High
	Hardwood floors	Related to consumption; general impact; material use and biotic resource consumption	UNEP (2010); JRC (2006); JRC (2011); EC (2012)	High
	Toilets	Related to consumption; general impact; water consumption and energy	UNEP (2010); JRC (2006); JRC (2011); EC (2012)	High

	Showerheads	Related to consumption; water consumption and energy	UNEP (2010); JRC (2011); EC (2012)	High
Personal transport	Passenger vehicles	Related to consumption; general impact; energy use	JRC (2006); JRC (2011); EC (2012)	High
	Tyres	Energy use, waste and material consumption	JRC (2011); EC (2012)	High
	Airlines	Related to consumption; energy use	UNEP (2010); JRC (2011)	High
Tourism accommodation services	Hotels	General impact	EC (2012)	Medium
Utilities	Household electricity services	Related to production	UNEP (2010)	High
	Household water utilities	Water consumption	JRC (2006); JRC (2011)	High
Financial services	Consumer investment products (excl. pensions & securities & savings)	NA	NA	NA

Housing, food and drink[15], and mobility/transportation were consistently identified as responsible for a large portion of the environmental impacts of consumption in the EU.[16] Paper[17] and household appliances[18] were also identified in multiple studies for their environmental impacts.

In relation to the current study and the proposed list of market sectors, no evidence was found on the specific environmental impacts of financial services, baby products and personal hygiene & beauty products.

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[15] While the food and drink sector is outside the scope of the current study, all references made to this sector by the studies examined were left in so as to accurately portray the overall study outcomes.

[16] JRC (2006). *Environmental impact of products;* UNEP (2010). *Assessing the environmental impacts of consumption and production: Priority products and materials*; JRC (2011). *Analysis of the future application of product policy instruments in the EU;* EC (*to be published in end 2012*). *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products.*

[17] JRC (2011). *Analysis of the future application of product policy instruments in the EU,* EC (*to be published in end 2012*) *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products*.

[18] JRC (2006). *Environmental impact of products;* UNEP (2010). *Assessing the environmental impacts of consumption and production: Priority products and materials*; JRC (2011). *Analysis of the future application of product policy instruments in the EU;* EC (*to be published in end 2012*). *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products*

We however want to point out that misleading green claims can be found on any kind of products. Those on low environmental impacts products mislead consumers like the others, and make them distrust environmental information in general. Therefore the criterion "environmental impact of the product/market" is to be used carefully.

1.4 The presence of green claims in the specific market

Several studies and databases were consulted to determine the presence of green claims on the market. These sources included:

- The EU Ecolabel website (http://ec.europa.eu/environment/ecolabel/)
- The Ecolabel index (http://www.ecolabelindex.com/)
- Defra (2010) Assessment of Green Claims in marketing
- Defra (2010) Assessment of Green Claims on packaging
- TerraChoice (2010) The Sins of Greenwashing
- SustainAbility (2011) Signed, Sealed... Delivered? Behind Certifications and Beyond Labels
- Lee Ahern et al. (2012), Key trends in environmental advertising across 30 years in National Geographic magazine
- BIO et al. (2012) Support to the impact assessment of a new proposal on the measurement of the environmental performance of products, Study for the European Commission, DG ENV

In addition to the above studies, the presence of EU legislation requiring the environmental performance labelling of certain products (e.g. EU Energy Label for white goods, etc.) as well as national and voluntary labels were also taken into account.
In particular, the Defra studies on the presence of green claims in marketing and on product packaging in the UK were consulted. Defra, which is the UK government department responsible for policy and regulations on the environment, food and rural affairs, recently commissioned several studies that analysed the presence of green claims in marketing and on product packaging in the UK. Although focused only on the UK, findings of this study can provide some indication of the situation around Europe. According to the Defra studies, the most prominent sectors where green claims are found include: automotive, energy (e.g. transport, energy using products) and public utilities (e.g. electricity services) sectors. Of the claims that were analysed in the study:

- 68% of claims are found in print media – print media
- 61% of green claims relate to a specific product or service (21% relate to a company's broader brand message)
- 63% of green claims are made in conjunction with another claim(s) i.e. performance and /or cost in the automotive sector

The Defra studies indicate that the most prominent sectors where green claims are found include: **automotive, energy (e.g. transport, energy using products) and public utilities (e.g. electricity services) sectors**. In the Defra study, the products were selected based on "typical" products and services purchased by UK consumers either in stores or on the Internet. The ten market sectors selected were:

- Banking
- Building & Home
- Clothing
- Electronics
- Energy
- Food & Drink

- Personal Care
- Household
- Tourism
- Transportation

In the Defra study, the selection of market sectors was based on products and services identified by Defra's sustainable consumption policies and programs as well as other sources from literature review. In terms of the products selected under each market sector, selection was based on:

- Products that were commonly purchased and readily available to a typical UK consumer
- Products that are known to have high rates of environmental claims (e.g. baby products, household cleaners, paint, laundry detergent, cars, credit cards, energy, tyres, windows, laptop computers, carpeting, and hardwood flooring).

A study carried out by an NGO reviewed 5,296 products with environmental claims in the U.S. and Canada. The products that were selected included: **baby care products, toys, office products, building and construction products, cleaning products, house wares, health and beauty products, and consumer electronics**[19] In particular, green claims are increasing for **baby care products** and **household cleaning products**. According to the report, baby care products and toys are experiencing a wide scale "greening", which is growing rapidly. For household cleaning products, the study indicates that this sector was once a niche category and the territory of small (even anti-establishment) brands; however green cleaning has now hit the mainstream. The study categorises "cleaning products", to be both cleaning chemistry (such as detergents, window cleaners, and general purpose cleaning liquids), and tissue products (such as toilet paper, paper towels, etc.).
A study launched by the Commission looked at the presence of environmental labels for a particular set of product categories. The products were selected based on their potential for environmental improvement and to ensure that they cover most of the manufacturing/servicing sectors that fall under the existing product policies in the EU[20]. These products included:

- Construction materials
- Cars
- Computers
- Household washing machines
- Clothing
- Paper products
- Cleaning products
- Tourist accommodation services
- Food (out of study scope)

The table below provides a list of some of the types of environmental claims seen around the EU on certain products[21]. The environmental claims include environmental labels and product category rules. Product category rules (PCR) are most often used in the context of environmental declarations, which are primarily intended for use in business-to-business (B2B) communication, however it is also used in business-to-

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[19] TerraChoice (2010). *The Sins of Greenwashing*.
[20] BIO et al. (2012). *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products*.
[21] BIO et al. (2012). *Support to the impact assessment of a new proposal on the measurement of the environmental performance of products*.

consumer (B2C) communication, albeit less frequently. PCR is a form of guidance and rules for the collection of data and other information on specific products, how the calculations should be done, and how this information should be presented.

Product/services	Existing environmental labels	Identified Product Category Rules for EPD[22]
Construction products	Forest Stewardship Council certification label (for wood and paper products) Programme for the Endorsement of Forest Certification schemes (PEFC)	Support services to agriculture, hunting forestry, fishing, mining and utilities; Sawn timber; Copper, ores and concentrates; Basic metals Stone, clay and sand
	EU Ecolabel Programme for the Endorsement of Forest Certification schemes (PEFC) for timber Nordic Swan Blue Angel (DE) Cradle to Cradle Certification Climatop Energy Saving Recommended (UK) Carbon Reduction Label (UK) BRE Certified Environmental Profile (UK) Waterwise (UK) GreenGuard Eco-INSTITUT label (DE) – indicates hazardous materials content in construction products NF-Environnement Mark (FR) ANAB - Architettura Naturale (IT) Bundesverband Deutscher Fertigbau (BDF)	Construction products and construction services Tiles, flagstones, bricks and similar articles of cement, concrete or artificial stone; Clay construction products Cement; Concrete; Concrete roof coverings; Engineered stone; Flooring materials Wood particleboards (expired); Building products - quality controlled treated timber; Products of wood, cork, straw and plating material; Wood particle and fibreboards; Builders' joinery and carpentry of wood; Steel for reinforcement of concrete; Self-supporting profiled sheet and light for roof coverings; Air ducts - substantial materials Insulation materials Paints and varnishes and related products; Sanitary ware of ceramic Sanitary ware of iron, steel, copper or aluminium Windows - Frames,

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[22] Identified through www.environdec.com/en/Product-Category-Rules/PCR-Search/

	ECOproduct (NO) Carbon Reduction Label (UK) Climatop (Switzerland)	transparent surfaces, shutters; Products in glass yarn for reinforcement use
	Nordic Swan BREEAM (UK) The HQE label (FR) LEED US Green Building Council EU Energy Labelling of Buildings 100% Energia Verde (IT)	Constructions; Buildings; Highways, streets and roads Construction services
Cars		Crude petroleum and natural gas; Fuels; Lubricants; Basic metals; Steel products; Metal castings; Copper wires; Fabricated metal products; Corrosion protection of fabricated steel products Plastics in primary forms; Rubber and plastic products; Products in glass yarn for reinforcement use; Glass and glass products and other non-metallic products; Ball or roller bearings Machine-tools for drilling, boring or milling metal; AC Motor
	Energy Labelling for Tyres EU CO2 label for new vehicles	Passenger vehicles; Transport equipment; Bus traffic; Passenger transport services; Rental services of transport vehicles with operators
Computers		Steel products; Fabricated metal products; Copper wires; Electric wire and cables; Plastics in primary forms; Rubber and plastic products Glass and glass products and other non-metallic products Electronic devices based on

		printed circuit boards; Power supply; Integrated Circuits
	EU Ecolabel Energy Star	Personal digital assistants and similar computers TFT-LCD Displays Laser printers used with data processing machines Microcomputers Radio, television and communication equipment and apparatus; ADSL (Asymmetrical Digital Subscriber Line Customer Premises Equipment) Office, accounting and computing machinery IT-services Telecommunications, broadcasting and information supply services
White goods	EU Ecolabel Energy Labelling Nordic Swan Blue Angel (DE)	Refrigerator for household appliances; Washing machines and dishwashers for household use; Household Washing ; Cooker hood
Clothing (cotton)	EU Ecolabel Energy Labelling Nordic Swan Blue Angel (DE) Oeko-Tex Standard 100 Coop Naturaline: Switzerland The bluesign® standard Ecoproof (DE)	Textile yarn and thread; Knitted or crocheted fabrics; wearing apparel; Nonwovens for clothing, protective clothing and upholstery Table linen for industrial and private use Textile articles other than apparel
	Nordic Swan	
Paper	Forest Stewardship Council certification label (for wood and	Support services to agriculture, hunting forestry,

	paper products)	fishing, mining and utilities
	Programme for the Endorsement of Forest Certification schemes (PEFC)	Forest cranes
	EU Ecolabel Nordic Swan Blue Angel (DE)	Pulp, paper and paper products; Tissue products; Processed paper and paperboard; Containers of paper and paperboard; Beverage cartons; Absorbent hygiene products; Books, in print Paper chemicals Other manufacturing services; publishing, printing and reproduction services; materials recovery services
Cleaning products		Chemical products; Basic chemicals; Basic organic chemicals; Basic inorganic chemicals
	EU Ecolabel Nordic Swan Blue Angel (DE)	Detergents and washing preparations Professional cleaning services of buildings
Tourist accommodation services	EU Ecolabel Nordic Swan Blue Angel (DE) Green Key BIO Hotels (DE) Green Tourism Business Scheme (UK)	Accommodation, food and beverage services; Hotel services

Another study published by SustainAbility (and sponsored by Starbucks, Mars, and Office Depot) selected environmental claims to analyse based on the largest companies in a particular market sector in Europe and North America, where environmental certification and labelling is relatively advanced.[23] The market sectors that were selected included:

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[23] SustainAbility (2011). *Signed, Sealed Delivered: Behind Certifications and Labels*.

- Apparel (shoes and clothing)
- Carpet (textiles)
- Electronics
- Household & personal care
- Pulp & paper
- *Food and Beverage (out of study scope)*

The table below illustrates the market sector, types of labels used and the name of the companies who use the green claims[24].

Labeling is now commonplace in many consumer goods industries	Examples of companies in the sector	Labels used in the sector	Users of the ten largest companies in the sector (Exceptions)
Apparel	Adidas Nike Richemont VF Corporation	Organic (cotton)	All (Richemont Rolex)
Carpet	Beaulieu Interface Mohawk Shaw	GreenGuard NSF 140	All
Electronics	Apple LG Panasonic Samsung	Energy Star EPEAT	All
Food & Beverage	Coca-Cola Kraft Nestlé Unilever	Fairtrade Marine Stewardship Council Organic Rainforest Alliance UTZ Certified	All (Anheuser-Busch Kirin Holdings)
Household & Personal Care	Henkel Kimberly-Clark L'Oréal Procter & Gamble	AISE Eco-Cert Fairtrade Nordic Swan Organic	All (Procter & Gamble Kao Corporation)

Pulp &
Paper
	International Paper
	Nippon Paper
	Oji Paper
	Stora Enso
		Forest Stewardship Council
		Programme for the
		    Endorsement of
		    Forest Certification
		Sustainable Forestry Initiative
		Sustainable Green
		    Ecosystem Council
			All
			(Procter & Gamble)

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[24] Terrachoice (2010). *The Sins of Greenwashing*.

1.5 Problematic marketing/presence of misleading claims according to consumer (and other) reports

The above mentioned sources of information lead to obtain an overall picture of the current situation in Europe regarding the presence of green claims. Where there is a presence of green claims, the possibility of misleading claims also exists.

According to the UCPD, article 6 and 7, misleading commercial practices can be seen as:

I.   Misleading actions

II.   Misleading omissions

I. Misleading actions

A commercial practice shall be regarded as misleading if it contains false information and is therefore untruthful or in any way, including overall presentation, deceives or is likely to deceive the average consumer, even if the information is factually correct, in relation to one or more of the following elements, and in either case causes or is likely to cause him to take a transactional decision that he would not have taken otherwise:

(a) the existence or nature of the product;

(b) the main characteristics of the product, such as its availability, benefits, risks, execution, composition, accessories, after sale customer assistance and complaint handling, method and date of manufacture or provision, delivery, fitness for purpose, usage, quantity, specification, geographical or commercial origin or the results to be expected from its use, or the results and material features of tests or checks carried out on the product;

(c) the extent of the trader's commitments, the motives for the commercial practice and the nature of the sales process, any statement or symbol in relation to direct or indirect sponsorship or approval of the trader or the product;

(d) the price or the manner in which the price is calculated, or the existence of a specific price advantage;

(e) the need for a service, part, replacement or repair;

(f) the nature, attributes and rights of the trader or his agent, such as his identity and assets, his qualifications, status, approval, affiliation or connection and ownership of industrial, commercial or intellectual property rights or his awards and distinctions;

(g) the consumer's rights, including the right to replacement or reimbursement under Directive 1999/44/EC of the European Parliament and of the Council of 25 May 1999 on certain aspects of the sale of consumer goods and associated guarantees, or the risks he may face.

A commercial practice shall also be regarded as misleading if, in its factual context, taking account of all its features and circumstances, it causes or is likely to cause the average consumer to take a transactional decision that he would not have taken otherwise, and it involves:

(a) any marketing of a product, including comparative advertising, which creates confusion with any products, trade marks, trade names or other distinguishing marks of a competitor;

(b) non-compliance by the trader with commitments contained in codes of conduct by which the trader has undertaken to be bound, where: (i) the commitment is not aspirational but is firm and is capable of being verified, and (ii) the trader indicates in a commercial practice that he is bound by the code.

II. Misleading omissions

1. A commercial practice shall be regarded as misleading if, in its factual context, taking account of all its features and circumstances and the limitations of the communication medium, it omits material information that the average consumer needs, according to the context, to take an informed transactional decision and thereby causes or is likely to cause the average consumer to take a transactional decision that he would not have taken otherwise.

2. It shall also be regarded as a misleading omission when, taking account of the matters described in paragraph 1, a trader hides or provides in an unclear, unintelligible, ambiguous or untimely manner such material information as referred to in that paragraph or fails to identify the commercial intent of the commercial practice if not already apparent from the context, and where, in either case, this causes or is likely to cause the average consumer to take a transactional decision that he would not have taken otherwise.

3. Where the medium used to communicate the commercial practice imposes limitations of space or time, these limitations and any measures taken by the trader to make the information available to consumers by other means shall be taken into account in deciding whether information has been omitted.

4. In the case of an invitation to purchase, the following information shall be regarded as material, if not already apparent from the context:

(a) the main characteristics of the product, to an extent appropriate to the medium and the product;

(b) the geographical address and the identity of the trader, such as his trading name and, where applicable, the geographical address and the identity of the trader on whose behalf he is acting;

(c) the price inclusive of taxes, or where the nature of the product means that the price cannot reasonably be calculated in advance, the manner in which the price is calculated, as well as, where appropriate, all additional freight, delivery or postal charges or, where these charges cannot reasonably be calculated in advance, the fact that such additional charges may be payable;

(d) the arrangements for payment, delivery, performance and the complaint handling policy, if they depart from the requirements of professional diligence;

(e) for products and transactions involving a right of withdrawal or cancellation, the existence of such a right.

5. Information requirements established by Community law in relation to commercial communication including advertising or marketing, a non-exhaustive list of which is contained in Annex II of the UCPD, shall be regarded as material.

The act of misleading consumers regarding the environmental performance of a product or a company is often referred to as **green-washing**.

The following studies were consulted in detail to determine the presence of misleading green claims in specific market sectors:

SustainAbility (2011) Signed, Sealed, Delivered?

BIO et al. (2012) Study on different options for communicating environmental information for products Final report

BSR (2009) Understanding and Preventing Greenwash: A Business Guide

Greenpeace (2012) Greenwash: How some powerful corporations are standing in the way of sustainable development

The Norway Consumer Ombudsman (2009) Guidelines on Using Claims such as "Climate Neutral" etc. in Marketing

ASA (2008) Environmental claims in advertising. Is green a grey area?

ASA (2008) Environmental Claims Survey

ASA (2011) The Green Milestone

Yates, Lucy (2009) Green expectations: Consumers' understanding of green claims in advertising

TerraChoice (2010) The Sins of Greenwashing

Ademe (2007) La publicité est-elle respectueuse du développement durable?

ARPP/Ademe (2011) Bilan 2011: Publicité et Environnement

"The Top 25 Greenwashed Products in America", www.businesspundit.com/the-top-25-greenwashed-products-in-america

European Bioplastics Bulletin (2012) No greenwashing with bioplastics, issue 04/2012, http://en.european-bioplastics.org/blog/2012/09/14/no-greenwashing-with-bioplastics/

FoE (2011) Flying in the face of the facts: Greenwashing the aviation industry with biofuels

Greenwashing Index, www.greenwashingindex.com

The Advertising Standards Authority (ASA) is the UK's independent regulator of advertising across all media, including marketing on websites. According to their most recent figures, the ASA has recorded a growing number of complaints in recent years– in 2006 it received 184 complaints about environmental claims; by 2007 this had increased to 561 complaints. Complaints have gone down in 2008 to 369; however the number of adverts that had upheld decisions against them has gone up by 14 %. About 10% of the complaints came from companies setting out to discredit their competitors' green claims. These rulings were mainly in the **motoring, utilities and energy sectors**.[25] For example, at a conference held by the ASA on green claims, the following companies and their green campaigns were highlighted for misleading claims and investigated by the ASA. ASA also considered that these were some of the ads, which have set benchmarks for the industry to follow:

Shell Europe Oil Products Ltd (transport sector): deemed misleading because the claim "We use our waste CO2 to grow flowers" implied that Shell used all of its waste CO2 to grow flowers, whereas it was shown only 0.325% of their emissions were used to grow flowers.

British Gas Trading Ltd (public utilities/heating and electricity sectors): the claim "carbon zero" implied the fuel used was carbon free and did not produce carbon dioxide.

Lexus (GB) Ltd (personal transport): their claim in a magazine ad was ruled misleading because the text in the ad, which clarified the claim was not prominent enough. Also the claim "zero guilt" implied that the car caused little or no damage to the environment.

Ryanair Ltd (passenger air transport): Misleading claims on global emissions of the UK airline industry

easyJet Airline Co Ltd (passenger air transport): Misleading claims on the company's actions to reduce CO2 emissions

Eurostar Group Ltd (public transport): claim that its journeys would be carbon neutral was challenged by complainants as misleading[26]

The ASA also noticed a number of recurring issues, as complaints have increased. The most common claims being challenged are:

Carbon claims – carbon zero, carbon neutral, carbon negative

Cradle to grave claims

Claims about energy sources (e.g. 'renewable')[27]

The figure below indicates specific market sectors where complaints on environmental claims were investigated by the ASA. Cars, holiday and travel sector, and utilities (energy and water companies etc.) are high on the complaints list. The 'non-commercial' sector includes the UK government and pressure groups (whose adverts and leaflets are subject to the same rules as companies)[28].

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[25] Yates, Lucy (2009). *Green expectations: Consumers' understanding of green claims in advertising*.

[26] ASA (2008). *Environmental claims in advertising. Is green a grey area? A stakeholder consultation seminar Advertising Standards*.

[27] ASA (2008). *Report on Environmental Claims*.

[28] Futerra (2008). *The Greenwashing Guide*.
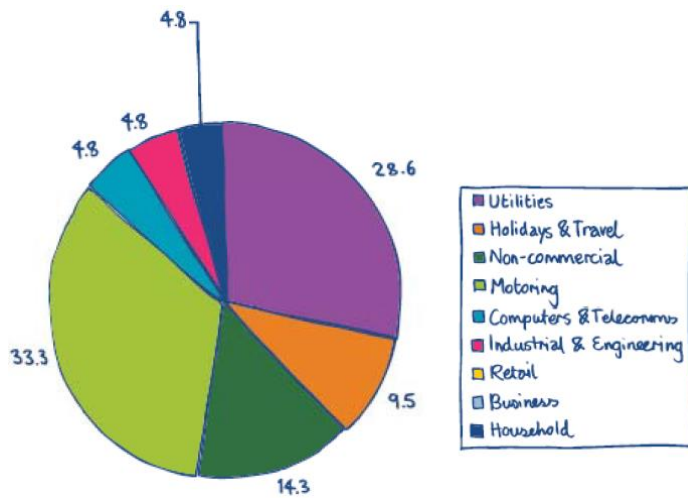
According to the AARP (Autorité de regulation professionelle de la publicité), which is France's self-regulatory advertising standards organization, in 2010 the construction and building materials market was the sector that was most concerned by misleading environmental claims.[29] In 2011, in addition to the automobile sector, household decorative items appeared to also be particularly effected by misleading environmental claims. Other figures presented at an OECD workshop indicate that in France, environmental claims multiplied by between 2006 and 2009. Of these claims, 3 % were found to be misleading (i.e. non-compliant with French labelling standards).[30]

Since 2007, TerraChoice (a sustainability and marketing consultancy) has carried out annual reviews of environmental claims found in the North American market. In the most recent report carried out in 2010, the research team found that here are many more "green" home and family products and less greenwashing. The number of products claiming to be green increased by 73%. Greenwashing is still a significant problem, however there is evidence that it is improving – the proportion of sin-free products appears to have doubled in each of the last two years, from less than 1% in 2007 to approximately 2% in 2009, and to almost 4.5% in 2010.[31] Rulings

In the US, 28 rulings have been made on green claims between 1988 and 2008. These claims notably concerned nuclear energy, household products, plastic bags, coffee filters, and plasma televisions.[32]

In terms of the growth and trends in green claims, a recent academic study found that the amount of "green" advertising rises and falls in conjunction with key indicators of economic growth.[33] Another aspect that the study found was that green advertising has evolved over time, both in the types of ads that run and in the messaging. For example, in the most recent decade, green claims are characterized by a continued increase in the percentage of ads focused on greenhouse gas reduction and a decrease in energy independence messages, as well as an increase in messages that focus on the general state of the environment. Green claims are also becoming more emotional in nature.

The following table indicates whether evidence was found in the consulted literature (listed in 2.4 and 2.5) on the presence of green claims, as well as misleading green

29 ARPP/ADEME (2011). *Bilan 2011: Publicité et Environnement*.
30 ARPP/ADEME (2010). *Publicité et arguments écologiques: La situation Française*. Presented at OECD workshop on Green Claims.
31 TerraChoice (2010). *The Sins of Greenwashing*.
32 BSR (2009). *Understanding and Preventing Greenwash: A Business Guide*. Retrieved from www.bsr.org/reports/Understanding%20_Preventing_Greenwash.pdf
33 Lee Ahern, Denise Sevick Bortree, & Alexandra Nutter Smith (2012). *Key trends in environmental advertising across 30 years in National Geographic magazine*. Retrieved from Journal of Public Understanding of Science.

claims. In many cases, the literature indicates the broader market sector, rather than the specific products.

Market sector/products	Presence of green claims	Source	Presence of misleading claims	Source
Consumer electronics	X	Defra (2010) TerraChoice (2010) SustainAbility (2011)	X	TerraChoice (2010)
Mobile phones	X	Greenwashing Index	X	Greenwashing Index
Laptops	X	BIO et al. (2012) EU Ecolabel Defra (2010)	X	Greenwashing Index
Light bulbs/lamps	X	EU Ecolabel Defra (2010)	NA	-
Televisions	X	EU Ecolabel	X	BSR (2009)
Household appliances	X	Defra (2010)	X	AARP (2011)
Washing machines	X	BIO et al. (2012) Defra (2010)	X	The Top 25 Green-washed Products (2010)
Refrigerators	X	EU Energy Label	X	The Top 25 Green-washed Products (2010)
Dishwashers	X	EU Energy Label	X	The Top 25 Green-washed Products (2010)
Microwave ovens	NA	-	NA	-
Coffee machines	NA	-	NA	-
Irons	NA	-	NA	-
Textiles	X	Defra (2010)	X	The Top 25 Green-washed

		EU Ecolabel		Products (2010)
Clothing	X	Defra (2010) SustainAbility (2011) BIO et al. (2012) EU Ecolabel	X	The Top 25 Green-washed Products (2010) Greenwashing Index
Footwear	X	Defra (2010) EU Ecolabel	X	Greenwashing Index
Carpet	X	SustainAbility (2011) EU Ecolabel Defra (2010)	NA	-
Pulp paper	X	SustainAbility (2011) BIO et al. (2012)	X	The Top 25 Green-washed Products (2010) Greenpeace (2012) Greenwashing Index
Copying/graphic paper	X	TerraChoice (2010) EU Ecolabel	X	The Top 25 Green-washed Products (2010) Greenpeace (2012) Greenwashing Index
Household cleaning and storage products	X	Defra (2010) BIO et al. (2012)	X	AARP (2011) The Top 25 Green-washed Products (2010)
All-purpose cleaners	X	TerraChoice (2010) EU Ecolabel	X	TerraChoice (2010) The Top 25 Green-washed

		Defra (2010)		Products (2010)
				Greenwashing Index
Washing machine detergents	X	TerraChoice (2010)	X	TerraChoice (2010)
		EU Ecolabel		The Top 25 Green-washed Products (2010)
		Defra (2010)		Greenwashing Index
Dishwashing detergents	X	TerraChoice (2010)	X	TerraChoice (2010)
		EU Ecolabel		Greenwashing Index
Rubbish bags	X	Defra (2010)	X	European Bioplastics Assoc.
				BSR (2009)
Personal hygiene, beauty & baby products	X	Defra (2010)	X	AARP (2011)
		TerraChoice (2010)		The Top 25 Green-washed Products (2010)
		SustainAbility (2011)		
Shampoos	X	EU Ecolabel	X	The Top 25 Green-washed Products (2010)
		Defra (2010)		Greenwashing Index
Lipstick	X	Defra (2010)	NA	-
Hand soap	X	EU Ecolabel	NA	-
Toothpaste	NA	-	NA	-
Skin creams	X	Defra (2010)	NA	-
Baby bottles	X	TerraChoice (2010)	X	TerraChoice (2010)
Baby diapers	X	TerraChoice	X	The Top 25 Green-washed

		(2010)		Products (2010)
		Defra (2010)		Greenwashing Index
Toilet paper	X	TerraChoice (2010)	X	TerraChoice (2010)
		EU Ecolabel		
		Defra (2010)		
Housing/building materials	X	Defra (2010)	X	AARP (2011)
		TerraChoice (2010)		TerraChoice (2010)
		BIO et al. (2012)		
Paints	X	EU Ecolabel	NA	-
		Defra (2010)		
Windows	X	Defra (2010)	NA	-
Hardwood floors	X	EU Ecolabel	NA	-
		Defra (2010)		
Toilets	X	Defra (2010)	NA	-
Showerheads	NA		NA	
Personal transport	X	Defra (2010)	X	ASA (2008)
Passenger vehicles	X	Defra (2010)	X	ASA (2008)
		BIO et al. (2012)		AARP (2011)
				The Top 25 Green-washed Products (2010)
				Greenwashing Index
Tyres	X	Defra (2010)	NA	-
		EU Energy label		
Airlines	X	Defra (2010)	X	ASA (2008)

					Greenwashing Index The Top 25 Green-washed Products (2010)
Tourism accommodation services	X	Defra (2010) BIO et al. (2012) EU Ecolabel	X		ASA (2008) AARP (2011)
Hotels	X	BIO et al. (2012) EU Ecolabel Defra (2010)	X		The Top 25 Green-washed Products (2010)
Utilities			X		ASA (2008)
Household electricity services	X	Defra (2010)	X		Defra (2010) The Top 25 Green-washed Products (2010) Greenpeace (2012)
Household water utilities	X	Defra (2010)	X		Defra (2010)
Financial services	X	Defra (2010)	X		AARP (2011)
Bank cards	X	Defra (2010)	X		Defra (2010)

1.6 Related EU legislation

Under this selection criterion all EU legislation regulating the provision of information on the environmental performance of products was reviewed and in particular for the selected products:

Mandatory Legislation	Scope	Products and services covered
Directive 2010/30/EU on the indication by	Boilers and combo-boilers, Water heaters, Computer monitors, Imaging Equipment, TV, Battery chargers and external power supplies, Office	Washing machines, refrigerators, televisions, dishwasher

labelling and standard product information of the consumption of energy and	lighting, Street lighting, Room air conditioning, Comfort Fans, Residential Ventilation, Electric motors, Circulators, Fans, Water pumps, Commercial refrigerators and freezers, Domestic refrigerators and	
other resources by energy-related products	freezers, Domestic dishwashers, Domestic washing machines, Solid fuel small combustion installations , Household tumble driers , Vacuum cleaner, Complex set-top boxes, Domestic lighting part I "non-directional lamps", Domestic lighting part II "directional lamps", Local room heating products, Central heating products using hot air to distribute heat, Domestic and commercial ovens, Domestic and commercial hobs and grills, Professional washing machines, dryers and dishwasher, Non-tertiary coffee machines, Networked standby losses of energy using products, Uninterruptible power supplies (UPS), Wastewater pumps, Clean water pumps (larger than those under Lot 11), Motors and drives (outside scope of Regulation 640/2009), Compressors, Medical imaging equipment, Refrigerating and freezing equipment, Transformers, Sound and imaging equipment, Industrial and laboratory furnaces and ovens, Machine tools, Air-conditioning and ventilation systems Laundry dryers	
Regulation 1222/2009 on the labelling of tyres with respect to fuel efficiency and other essential	Re-treaded tyres; off-road professional tyres; tyres designed to be fitted only to vehicles registered for the first time before 1 October 1990; T-type temporary-use spare tyres; tyres whose speed rating is less	Tyres

parameters	than 80 km/h; tyres whose nominal rim diameter does not exceed 254 mm or is 635 mm or more; tyres fitted with additional devices to improve traction properties, such as studded tyres; tyres designed only to be fitted on vehicles intended exclusively for racing.	
Directive 1999/94/EC relating to the availability of consumer information on fuel economy and CO_2 emissions in respect of the marketing of new passenger cars	New passenger cars	Passenger vehicles
Directive 2009/72/EC of 13 July 2009 concerning common rules for the internal market in electricity	Generation, transmission, distribution and supply of electricity	Household electricity services
Voluntary Legislation	**Scope**	**Products and services covered**
Council Regulation 834/2007 on organic production and labelling of organic products	Live or unprocessed agricultural products; processed agricultural products for use as food; feed; vegetative propagating material and seeds for cultivation.	Indirectly: some personal and hygiene beauty products; household cleaning products
Directive 2009/28/EC on the promotion of the use of	Energy from renewable sources Indirectly: renewable energy heating and cooling systems and	Indirectly: household electricity services Indirectly: renewable energy heating and cooling systems and

energy from renewable sources and amending	equipment (e.g. heat pumps)	equipment (e.g. heat pumps)
		Green certificate on electricity from renewable energy source.
Regulation (EC) No 66/2010 on the EU Ecolabel	BEAUTY CARE: Soaps, shampoos and hair conditioners	Shampoos, hand soap, all-purpose cleaners, washing machine detergents, dishwashing detergents, apparel (clothing), footwear, paints and varnishes, personal computers, televisions, hardwood floors, light bulbs, copying/graphic paper, tissue paper, campsite services and tourist accommodation services
	CLEANING UP: All-purpose cleaners, Detergents for dishwashers, Industrial and Institutional Automatic Dishwasher Detergents, Hand dishwashing detergents, Laundry detergents, Industrial and Institutional Laundry detergents	
	CLOTHING: Textiles, Footwear	
	DO-IT-YOURSELF: Paints and varnishes	
	ELECTRONIC EQUIPMENT: Personal computers, Portable computers, Televisions	
	FLOOR COVERINGS: Wooden coverings, Hard floor coverings, Textile coverings	
	FURNITURE: Wooden furniture	
	GARDENING: Growing media and soil improvers	
	HOUSEHOLD APPLIANCES: Light bulbs, Heat pumps	
	LUBRICANTS: Lubricants	
	OTHER HOUSEHOLD ITEMS: Mattresses	
	PAPER PRODUCTS: Copy and graphic paper, Newsprint paper, Printed paper, Tissue paper	
	HOLIDAY ACCOMMODATION: Campsite services, Tourist	

	accommodation services	
Regulation 1221/2009 on the voluntary participation by organisations in a Community eco-management and audit scheme (EMAS)	establishment and implementation of environmental management systems by organisations, the systematic, objective and periodic evaluation of the performance of such systems, the provision of information on environmental performance, an open dialogue with the public and other interested parties and the active involvement of employees in organisations and appropriate training	Indirectly: all
Regulation (EC) No 106/2008 energy-efficiency labelling programme for office equipment (Energy Star Regulation)	Computers, computer monitors, photocopiers, printers, digital duplicators, faxes, franking machines, multifunction devices and scanners.	Personal computers
Upcoming legislation	**Scope**	**Products and service covered**
Revision of Ecolabel on television	No information yet	
Revision of the textile Eco-label on-going	No information yet	
Revision of the footwear Ecolabel on-going	No information yet	
Soaps, shampoos and hair conditioners Ecolabel under revision	No information yet	

Tissue paper Ecolabel under revision	No information yet

When we apply the above information to the 30 products selected, following summary table can be determined distinguishing between mandatory, voluntary and upcoming legislation.

Market sector	Product category	Existence of specific EU mandatory legislation	Existence of specific EU voluntary legislation	Upcoming legislation foreseen
Consumer electronics	Mobile phones			
	Laptops		Regulation (EC) No 106/2008 Commission Decision 2011/330/EU	
	Light bulbs/lamps	Regulation (EU) No 874/2012	Commission Decision 2011/331	Revision of the light sources Ecolabel will come soon
	Televisions	Regulation (EU) No 1062/2010	Commission Decision 2009/300/EC	Revision of the television Ecolabel coming soon
Household appliances	Washing machines	Regulation (EU) No 1061/2010		
	Refrigerators	Regulation (EU) No 1060/2010		
	Dishwashers	Regulation (EU) No 1059/20		

Market sector	Product category	Existence of specific EU mandatory legislation	Existence of specific EU voluntary legislation	Upcoming legislation foreseen
		10		
	Microwave ovens			
	Coffee machines			
	Irons			
Textiles	Clothing		Commission Decision 2009/567	Revision of the textile Ecolabel on-going
	Footwear		Commission Decision 2009/563	Revision of the footwear Ecolabel on-going
	Carpet		Commission Decision 2009/567	Revision of the textile Ecolabel on-going
Pulp paper	Copying/graphic paper		Commission Decision 2011/333	
Household cleaning and storage products	All-purpose cleaners		Commission Decision 2011/383	
	Washing machine detergents		Commission Decision 2011/264	
	Dishwashing detergents		Commission Decision 2011/263	
	Rubbish bags			
Personal hygiene, beauty & baby	Shampoos		Commission Decision 2007/506	Soaps, shampoos and hair conditioners Ecolabel under

Market sector	Product category	Existence of specific EU mandatory legislation	Existence of specific voluntary legislation	of EU	Upcoming legislation foreseen
products					revision
	Lipstick				
	Hand soap		Commission Decision 2007/506		Soaps, shampoos and hair conditioners Ecolabel under revision
	Toothpaste				
	Skin creams				
	Baby bottles				
	Baby diapers				
	Toilet paper		Commission Decision 2009/568		Tissue paper Ecolabel under revision
Housing/building materials	Paints		Commission decision 2009/544 Commission Decision 2009/543		
	Windows				
	Hardwood floors				
	Toilets				
	Showerheads				
Personal	Passenger	Directive 1999/94			

Market sector	Product category	Existence of specific EU mandatory legislation	Existence of specific EU voluntary legislation	Upcoming legislation foreseen
transport	vehicles	/EC		
	Tyres	Regulation (EC) No 1222/2009		
	Airlines			
Tourism accommodation services	Hotels		Commission Decision 2009/578	Tourism accommodation services under revision
Utilities	Household electricity services			
	Household water utilities			
Financial services	Bank cards			

1.7 Summary

The table below presents the outcomes of the mapping of the proposed products and services.

Market sector	Product category	Consumers' budget	Consumer perception of markets	Environmental impact of the product/market	Presence of green claims in the specific market	Problematic marketing/presence of misleading claims according to reports	Existence of specific EU mandatory legislation	Existence of specific EU voluntary legislation	Upcoming legislation foreseen
Consumer electronics	Mobile phones	--		High	X	X			
	Laptops	--	-	Medium	X	X	X	x	
	Light bulbs/lamps	--		High	X	X	X	X	
	Televisions	--	+	High	X	X	X	X	x
Household appliances	Washing machines	--		High	X	X	X		
	Refrigerators	--	+	High	X	X	X		
	Dishwashers	--		High	X	X	X		
	Microwave ovens	--		High					
	Coffee machines	--	++	High					
	Irons	--		High					

Textiles	**Clothing**	+		**Medium**	X	X	X	X	X
	Footwear	-	**--**		X	X	X	X	X
	Carpet	--	-	**High**	X	X		X	X
Pulp paper	**Copying/graphic paper**	--	NA	**Medium**	X	X	X	X	
Household cleaning and storage products	**All-purpose cleaners**	-	NA	**Medium**	X	X	X	X	
	Washing machine detergents	-	NA	**High**	X	X	X	X	
	Dishwashing detergents	-	NA	**High**	X	X	X	X	
	Rubbish bags	-	NA		X	X			
Personal hygiene, beauty & baby products	**Shampoos**	NA	-		X	X		X	x
	Lipstick	-			X	X			
	Hand soap	-			X	X		x	x
	Toothpaste	-			X	X			
	Skin creams	-			X	X			
	Baby bottles	NA			X	X			
	Baby diapers	NA			X	X			

Category	Item									
	Toilet paper	-		Medium	X	X			X	X
Housing/building materials	Paints	--	-	Medium	X	X			X	
	Windows	--	NA	High	X	X				
	Hardwood floors	--	-	High	X	X				
	Toilets	--	NA	High	X	X				
	Showerheads		NA	High						
Personal transport	Passenger vehicles	+	--	High	X	X	X			
	Tyres	--		High	X		x			
	Airlines	--	++	High	X	X				
Tourism accommodation services	Hotels	-	++	Medium	X	X			X	X
Utilities	Household electricity services	NA	--	High	X	X	X	X		
	Household water utilities	NA	-	High	X	X				
Financial services	Bank cards	--	--		X	X				

For each of the sectors, below a written rationale summarizing the selection of the products within the market sector is provided based on the in previous sections:

▪ Impact of the product on the consumers' budget (section 2.1*)*
▪ *Please note that when we refer in the below text to e.g. a low impact on the consumer budget, it relates to the Purchasing Power Standard (PPS) for corresponding Classification of Individual Consumption According to Purpose (COICOP)[34] products and services at EU level.*
▪ Consumer perception of markets (section2.2*)*
▪ *Please note that when we refer in the below text to e.g. satisfied, it is related to the outcome of the Market Performance Index as per the 2012 "Monitoring Consumer Markets in the European Union.*
▪ Environmental impact of the product/market (section2.3)
▪ The presence of green claims (section 2.4) and misleading green claims (section 2.5) in specific markets
▪ Related EU legislation (section2.6)

Consumer electronics
The products selected for this market sector include mobile phones, laptops, light bulbs/lamps, and televisions. Mobile phones in particular were identified by several studies as having environmental claims and some indication of misleading claims. Furthermore, due to the health concerns associated with the use of mobile phones, it is an interesting product to analyse in terms of whether environmental information is included alongside health claims. Another particularity of the consumer electronics sector is the fast moving advances in technological design and innovation – resulting in constantly evolving products and services. This is especially the case for laptops, mobile phones, and televisions. Light bulbs are also interesting to include in the analysis as they have been spotlighted recently in several energy-saving campaigns targeting households and schools and partly due to the EU phase-out of the use of incandescent light bulbs. Overall, these products have a relatively low impact on consumer budget. Consumers perceive the markets for laptop as relatively poorly performing whereas they are quite satisfied with that of televisions. Specific mandatory and voluntary legislation exists for laptops, light bulbs and televisions, with an upcoming legislation for televisions.

Household appliances
This sector is characterised by "white goods" or large electrical appliances used domestically, such as refrigerators and washing machines. "Brown goods" also fall under this sector, which includes small appliances that are portable or semi-portable machines e.g. microwave ovens, coffee makers. The products that have been selected for further review in this sector include washing machines, refrigerators, microwave ovens, coffee machines, and irons. All of these products have been identified through the literature review as having environmental claims as well as misleading claims. In particular, the European Commission has published several eco-design reports on the environmental impacts of the above appliances, sparking the attention of industry, which would be effected by any regulation that would, for example, put constraints on minimum energy performance levels or design requirements. As a result, some free riders may be tempted to use misleading claims about the environmental impacts of their products. Overall, these products have a relatively low impact on consumer budget and consumers are quite satisfied with these markets. Specific legislation exists for the specified white goods, whereas none exists for the given brown goods.

Textiles
The products selected within the textile sector include clothing, footwear, and carpets. All of these products have been identified by several studies as a sector with

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[34] United Nations Statistics Division. *COICOP (Classification of Individual Consumption According to Purpose)*. Retrieved from http://unstats.un.org/unsd/cr/registry/regcst.asp?Cl=5

environmental claims**.** Textiles are frequently purchased consumer products. It is also a sector that shows that green claims are growing due to demand for greener products.[35] Examples of green claims in this sector include information stating that fur is "green" or that cotton used in clothing is "organically grown". Clothing has a significant impact on consumer budget, whereas that of footwear and carpet is more limited. These markets are perceived as not performing well by consumers, especially those of clothing and footwear. Mandatory legislation exists for clothing and footwear, whereas voluntary ones exist for all the proposed three products as specified in 2.6. Upcoming legislation is foreseen for the three products.

Household cleaning/storage products

Studies indicate that there is a growing trend for the number of environmental claims seen on household cleaning items such as all-purpose cleaners and detergents. The products included under the household cleaning/storage sector include all-purpose cleaners, washing machine detergents and rubbish bags. Examples of environmental claims seen for household cleaning products include for example claims stating that the product is free of certain substances that are "harmful" for the environment or that the product is "environmentally friendly". These products have a low impact on consumer budget. Specific mandatory and voluntary EU legislation exists for those two products.

Rubbish bags are also included in the list of selected products due to recent claims of "biodegradability", "compostable", "oxo-degradable", and other environmental claims of certain plastics. According to the European Bioplastics Association, false or misleading communication of environmental product properties is a widespread problem in the marketplace.[36] This market has a relatively low impact on consumer budget.

Personal hygiene products

Personal hygiene products selected for further analysis include shampoos, skin creams, baby bottles, baby diapers, and toilet paper. Baby bottles are growing on the consumer radar due to warnings against BPA and phthalates. BPA contains hormone-like properties that raise concern about its suitability in consumer products and food containers. The European Union, Canada, and recently the United States have banned BPA use in baby bottles. As a consequence, a growing number of claims have been observed with "BPA-free" and "phthalate-free" (and variations on the theme) have become more frequent in the last year. According to one report, in the US, the percentage of products making BPA free claims increased by 577%, and those making phthalate-free claims increased by 2,550%.[37] Skin creams and toilet paper have a low impact on consumers' budget. The overall market is perceived by consumers as performing less well than others. Voluntary legislation exists for shampoo and toilet paper as specified in 2.6, and upcoming legislation is foreseen for those products.

Building and construction products

Several of the studies consulted highlighted this sector as one showing an increase in the number of green claims. For example, in 2011, according to the French advertising standards agency, building and construction products had a relatively high number of misleading environmental claims. The building and construction products sector is also a sector that shows increasing green claims are growing due to demand for greener products. Paints, windows, hardwood floors, and showerheads were the products selected for this sector. Paints, windows and hardwood floors have a low impact on consumers' budget. At the same time, the market for paints and hardwood floors is

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[35] Drinker, B. & Reath, LLP (2008). *FTC examines green claims for buildings and textiles: new Green Guides likely in 2009*. Retrieved from https://www.lexology.com/library/detail.aspx?g=64f31adc-7497-498a-87e4-a29fda1b91d8

[36] (2012). *European Bioplastics: No "greenwashing" with bioplastics*. Retrieved from http://en.european-bioplastics.org/blog/2012/09/10/pr-20120910/

[37] Terrachoice (2010). *Sins of Greenwashing report*.

perceived as performing less well than other markets. In this sector, voluntary legislation exists only for paints as specified in 2.6.

Transportation

Passenger vehicles in particular are products with many green claims, and are particularly known for having misleading environmental claims. Tyres and airlines are also included under this sector.

In the literature reviewed, cars were consistently cited as the one of the sectors that receive the highest number of complaints regarding misleading green claims. Cars have a large impact on consumers'' budget but the overall perception of this market is very low. Specific mandatory EU legislation exists for cars as specified in 2.6.

Concerning tyres, environmental claims are often linked to the materials they are composed of, how they should be recycled (or how "recyclable" they are), reduced fuel consumption, and reduced environmental impacts from the manufacturing process. However, evidence shows that claims promoting the environmental performance are not always substantiated with solid proof. This was the case for Goodyear, accused in 2008 for providing false green claims regarding the environmental performance of their tyres.[38] The Australian Competition and Consumer Commission challenged Goodyear to provide the information backing up the advertising statements about the environmental performance of their tyres – which the company was not able to do. Goodyear was forced to withdraw all materials making the claim, issue an official apology and offered partial refunds to anyone who purchased the tire between 1 February 2007 and 31 March 31 2008. Tyres have a low impact on consumer budget. Mandatory EU legislation exists as specified in 2.6.

Furthermore, in response to international pressure to reduce greenhouse gas (GHG) emissions, the aviation industry has started looking to biofuels to "green" its image. The International Air Transport Association (IATA) intends to source 6% of airline fuel from biofuels by 2020, whilst the European aviation industry, supported by the European Commission, intends to secure 2 million tonnes of bio-kerosene per year by 2020.[39] Also the CO_2 compensation schemes have found their way into the aviation industry. Airlines have a limited impact on consumer budget and this is a sector which is perceived as performing well. No specific EU legislation exists.

Literature has indicated that complaints about misleading green claims are frequently made by "competing" transportation services. According to one report, from 2004-2007, about 10% of complaints came from companies setting out to draw attention to their competitors' green claims. For example in 2008, EasyJet complained to the ASA about a Virgin Trains ad campaign, which claimed that a train journey emits 75% less carbon dioxide than a similar trip by air.[40] Airlines have a limited impact on consumer budget and this is a sector which is perceived as performing worse than others. No specific EU legislation exists.

Services

In the services sector, hotels and tourism services, household electricity services, and financial services were selected for further analysis.

In the hotels and tourism sector, some examples of green claims observed include for example the placement of green placards in each room to promote the reuse of towels, which helps the hotel to save water and to consequently "save the environment." Eco-hotels sometimes promise carbon-neutral practices and investment in carbon offsets, when in reality; only a fraction of overall energy usage may be offset. Hotels and tourism services have a low impact on consumer budget and are perceived as performing better than other sectors. Specific EU voluntary legislation exists and an upcoming one is foreseen.

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[38] GreenBiz Admin (2008). *Goodyear Admits Tire Claims Were Misleading, Offers Refund*. Retrieved from http://www.greenbiz.com/news/2008/06/30/goodyear-admits-tire-claims-were-misleading-offers-refund
[39] FoE (2011). *Flying in the face of the facts: Greenwashing the aviation industry with biofuels*.
[40] Futerra's Greenwash Guide (2008).

Electricity providers are also culprits of greenwashing. Several complaints on misleading green claims stating that energy was "clean" or that there "zero emissions" were received by the UK's ASA as well as by France's AARP. Electricity services are perceived as performing less well than other sectors. No specific EU legislation exists.

Another sector that has seen growth in terms of green claims is the financial services sector. According to one report, the market for "green banking" has strong growth potential, especially in Germany. At present, three million bank customers are taking advantage of green or social banking products and this could increase to six million by 2015, as a growing number of bank customers want to know more about how their money is invested.[41] However, there has been some indication of misleading green claims. Banks must gain the trust of their customers by ensuring that funds are invested in a transparent manner. This sector has a low impact on consumers' budget, but it is perceived as performing worse than others. No specific EU legislation exists.

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[41] Roland Berger Strategy Consultants (2012). *Sustainable banking offers financial institutions high growth potential*. Retrieved from http://www.rolandberger.hr/media/pdf/Roland_Berger_taC_Green_Banking_E_20121120.pdf

2 General Stakeholder consultation EU-level

2.1 Methodology

An invitation email was sent to organisations representing the interests of all the sectors covered by the selected products for the study, consumer organisations, environmental NGOs andadvertising associations, together with an accreditation letter from the European Commission. Stakeholders were also free to participate in the interview by telephone or by mail. In case of non response after several e-mail reminders, they were contacted by phone. In total, 566 stakeholders were invited to take part in the project, of which 65 responded positively and shared their reflections on the topics. Stakeholder insights were used throughout the report, to collect information and attitudes about environmental claims from multiple expert viewpoints.

The interviews served to collect data that would be relevant to the study. It also increased the visibility of the study to the EU actors for potential support amongst National Members if needed.

Below is the invitation email sent to respondents at EU Level.

Invitational Email

Subject: Stakeholder and expert consultation concerning the consumer market study on environmental claims for non-food products

Dear Madam, dear Sir,

The European Commission has contracted Significant GfK[42] and its partners, BIO IS, Milieu ltd, time.lex and Ecologic, to carry out a consumer study on environmental claims for non-food products in the European Union (EU) with insights in selected Third Countries. Please click here to see the European Commission's information letter concerning this study.

Within the scope of this study, the European Commission wishes to consult stakeholders and experts in the different EU Member States and in selected third countries.

Significant GfK has developed a brief questionnaire for stakeholders to provide input into this study. The questionnaire topics include such issues as your organisation's involvement and attitudes towards environmental claims, guidelines related to the development of environmental claims, and enforcement practices to ensure that consumer rights are protected.

Please click on the below link in order to complete this stakeholder questionnaire online.

(INSERT WEBLINK)

If you would prefer to conduct this interview by telephone rather than online, please reply to this email in order to arrange a telephone interview. Your feedback would be crucial in ensuring that all perspectives are taken into account and your participation would be highly appreciated. Furthermore, please feel free to forward this email to a colleague within your organisation if you feel that they would be the more appropriate person to answer this questionnaire.

Yours sincerely,

The Project Team

2.1.1 Countries surveyed

Contacts located in different EU Member States, although the focus of their work is EU-level affairs.

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[42] On August 1st 2013, Significant GfK changed its name into GfK Belgium.

2.1.2 Questionnaire

Below is the questionnaire sent to respondents at EU Level.

Screen 1 - Introduction and Background
This survey is on the topic of 'environmental claims', often known as 'green claims'. The following questions will collect information and opinions that you have in relation to environmental claims. According to the Unfair Commercial Practices Directive (UCPD) Guidance document, the expressions 'environmental claims' or 'green claims' refer to the practice of suggesting that a product or a service, is environmentally friendly or is less damaging to the environment than competing goods or services. This may be due to, for example, its composition, the way it has been manufactured or produced, the way it can be disposed of and the reduction in energy or pollution which can be expected from its use. For further details of this definition and the UCPD, please feel free to visit http://ec.europa.eu/justice/consumer-marketing/files/ucp_guidance_en.pdf or http://ec.europa.eu/justice/consumer-marketing/unfair-trade/index_en.htm

Please state the name of your organisation	
Please state your job title within this organisation	

Screen 2 - Collection of knowledge
Please enter the title or internet address of any relevant documents in the below text box, or upload documents to this questionnaire by using the below 'upload' button

An important part of our study focuses on the analysis of available data, reports and studies <u>related to environmental claims</u>. Would you have the possibility to provide us with any of the following relevant documents in particular? Reports and other publications from public institutions (national authorities, regulatory bodies, competition or trade authorities, etc.) at European, national or local level Reports and studies from research or consumer organisations, NGOs, think tanks, industry bodies, standards organisations, etc. Academic publications including books, articles, theses and working papers Databases, data sets resulting from previous data collection exercises, etc. Other related documents	

Screen 3 - Guidelines and Codes of Conduct	
The Unfair Commercial Practices Directive (UCPD) is the main EU legislation used to assess environmental claims. Do you have any recommendations for how the UCPD and its guidance could be improved in the context of environmental claims?	OPEN TEXT BOX
Please list any guidelines/codes of conduct that you are aware of on the use of environmental claims in marketing or on products? Please include both EU-level and national-level guidelines.	OPEN TEXT BOX
Considering your business sector in particular, please list any guidelines/codes of conduct that you are aware of on the use of environmental claims in marketing or on products? Please include both EU-level and national-level guidelines.	(QUESTION FOR BUSINESS ORGANISATIONS, AND COMPANIES) OPEN TEXT BOX

Screen 4 – Complaints about misleading environmental claims	
Did your organisation ever receive complaints from consumers or companies regarding environmental claims?	1. Yes 2. No
Of the following list, please list up to three complaints which you most commonly received regarding environmental claims?	(ASK IF CODE 1 – "receive complaints") 1. Not truthful 2. Exaggerating the environmental performance of the product/service 3. Not accurate 4. Having insufficient scientific evidence to support the environmental claim 5. Hiding any trade-offs or negative impacts on the environment 6. Not providing sufficient information e.g. about product's energy consumption or total environmental impact 7. Displaying a trust mark, quality mark or equivalent without having obtained the necessary authorization 8. Claiming that a product/service has been approved, endorsed or authorised by a public or private body, when this is not the case 9. Claiming to be a signatory of a code of conduct when the trader is not 10. Claiming that a code of conduct has an

	endorsement from a public or other body which it does not have 11. Use of an environmental claim, label or symbol that can cause confusion with official marks 12. Other (specify)
Upon receiving consumer complaints, what actions does your organisation most commonly take?	(ASK IF CODE 1 – "receive complaints") OPEN ANSWER BOX

Screen 5 – Public and Private Enforcement Practices	
Are you aware of any public enforcement practices (i.e. enforcement by government/ authorities rather than private enforcement/self-regulatory action) in relation to misleading environmental claims? (FOR BUSINESS ORGANISATIONS) Please only list public enforcement practices that are specific to your industry sector	1. Yes (please list the enforcement practices of which you are aware) 2. No
Considering the **public enforcement practices** listed, which one of them is most effective in limiting or preventing misleading environmental claims? Why do you give this answer?	(INSERT LIST BASED ON ENFORCEMENT PRACTICES THAT THEY ARE AWARE OF) Open text box for reason <u>why</u>
Are you aware of any **private enforcement practices or self-regulatory actions** (i.e. rather than by government authorities) in relation to misleading environmental claims? (FOR BUSINESS ORGANISATIONS) Please only list private enforcement practices or self-regulatory actions that are specific to your industry sector	1. Yes (please list the enforcement practices of which you are aware) 2. No
Considering the **private enforcement practices and self-regulatory actions** listed, which one of them is most effective in limiting or preventing misleading environmental claims? Why do you give this answer?	(INSERT LIST BASED ON ENFORCEMENT PRACTICES THAT THEY ARE AWARE OF)

Screen 6 - The European Consumer Summit: Multi-stakeholder Dialogue on Environmental Claims
In March 2013, the European Commission held 'the Consumer Summit' including a dialogue with stakeholders on the issue of environmental claims and recommendations for the future.

If you wish to know more, then the report of this multi-stakeholder process with the main findings and conclusions can be found at: http://ec.europa.eu/consumers/documents/consumer-summit-2013-mdec-report_en.pdf	
According to this dialogue, there are 9 key principles that should be taken into account when developing and implementing environmental claims. Claim substantiation Reliability Relevance and usefulness Transparency Clarity Proportionality Accessibility Completeness Comparability Taking these 9 principles into account, please list up to 3 product or brand names whose environmental claims can be considered 'best practice', with a brief rationale for choosing each one.	OPEN TEXT BOX, WITH UP TO 3 ROWS AVAILABLE
And taking these same 9 principles into account, please list up to 3 product or brand names whose environmental claims that can be considered as 'worst practice' (i.e. a misleading claim that meets none/few of the above principles), with a brief rationale for choosing each one.	OPEN TEXT BOX, WITH UP TO 3 ROWS AVAILABLE
Considering the past 5 or 10 years, what are the key trends that you have you noticed with regards to environmental claims (in your industry sector)? *Please answer this openly, according to your personal perception*	OPEN ANSWER
What more do you think could be done at EU level to contribute to informed green choices, and to help prevent misleading environmental claims?	OPEN ANSWER

Screen 7 - Stakeholder attitudes	
Please note that these final questions are not obligatory. If you do not have time to answer them, you may click 'Next' at the bottom of screen in order to finish the interview	
To what extent do you agree with each of the following statements?	
In general, consumers find it difficult to understand whether a product is environmentally friendly, based on the information provided on the packaging	
There are too many environmental labels and logos for consumers to be able to make an informed decision	
Consumers can easily distinguish between self-declaration claims and third-party certified labels	
Self-declared green claims are made by an organisation without involving external review by an independent third party	
Third-party certified claims employ third party attestation that certain characteristics or attributes of the product or its production method or system, laid down in specifications, have been observed/verified by an independent third party	1. Strongly agree 2. Agree 3. Neither agree nor disagree 4. Disagree 5. Strongly disagree 6. Don't Know
Considering your industry sector in particular, environmental claims are important to consumers in their decision-making process when purchasing a product / service	
It is clear <u>to you</u> when an advert or product is making a misleading environmental claim	
It is clear <u>to consumers</u> when an advert or product is making a misleading environmental claim	
It is clear <u>to you</u> who checks the truthfulness of environmental claims	
It is clear <u>to consumers</u> who checks the truthfulness of environmental claims	
It is clear <u>to you</u> if a logo is third-party certified or if it is a self-declared logo	
It is clear <u>to consumers</u> if a logo is third-party certified or if it is a self-declared logo	
Please feel free to suggest in the following text box the name of an expert or organization who	

you feel that we could also contact for stakeholder input.	

2.1.3 Data validation

The following actions were taken in order to increase the validity of the data collected:

- A computer-assisted script in which both data from telephone interviews and online interviews could be entered. Moreover, incoming paper questionnaires were also added in the same system. This measure allows the comparison of data entered by different stakeholders.
- The application of a computer-assisted script ensured that questions were routed appropriately and illogical answers were prevented.
- Stakeholders were able to choose which data collection method they preferred (online, telephone, on paper) and at which moment it suited them best to answer the questionnaire. They were also able to upload documents to present their findings.
- As outlined above, several actions to increase response were taken in order to maximize the output being gathered through the stakeholder interviews.
- The questionnaire content was customized towards the stakeholder interviewed. In addition, the questionnaire was largely similar to that used for the national stakeholders in order to allow comparison between both.
- Both the questionnaire and the list of contacts were approved by the European Commission.
- The data resulting from the stakeholder interviews is not considered to be representative, due to the small sample sizes and the non-equal sampling probability, but is used to demonstrate certain points or frame other results.

3 General Stakeholder consultation national–level

3.1 Methodology

Information was collected amongst stakeholders of relevant countries for each of the areas. As such, a tailored email was sent to all relevant national stakeholders for this study, namely:

- Ministries responsible for consumer policy, environmental policy and justice;
- Public agencies
- National consumer organisations
- Environmental NGOs;
- Industry associations;
- Individual companies (when data is available to the study team); and,
- Advertising authorities and associations.

Please note that for industry associations and individual companies, this list is based on the proposed selection of products for the study. Also, in many instances we had to sendt the email to a general email address for distribution within the organisation.

Stakeholders were also free to participate in the interview by telephone or by mail. In case of non response after several e-mail reminders, they were contacted by phone. The interviews served to collect data that would be relevant to the study.

Below is the invitation email sent to respondents at National Level.

Invitational Email

Subject: **Stakeholder and expert consultation concerning the consumer market study on environmental claims for non-food products**

Dear Madam, dear Sir,
The European Commission has contracted Significant GfK and its partners, BIO IS, Milieu ltd, time.lex and Ecologic, to carry out a consumer study on environmental claims for non-food products in the European Union (EU) with insights in selected Third Countries. Please click here to see the European Commission's information letter concerning this study.

Within the scope of this study, the European Commission wishes to consult stakeholders and experts in the different EU Member States and in selected third countries.

Significant GfK has developed a brief questionnaire for stakeholders to provide input into this study. The questionnaire topics include such issues as your organisation's involvement and attitudes towards environmental claims, and guidelines related to the development of environmental claims. Please click on the below link in order to complete this stakeholder questionnaire online.
(INSERT WEBLINK)

Your feedback would be crucial in ensuring that all perspectives are taken into account and your participation would be highly appreciated. Furthermore, please feel free to forward this email to a colleague within your organisation if you feel that they would be the more appropriate person to answer this questionnaire.

Yours sincerely,
The Project Team

3.1.1 Countries surveyed

The email invite was sent to contacts in all EU member states, and to further contacts in Iceland, Norway, Switzerland and the USA.

3.1.2 Questionnaire

Below is the questionnaire sent to respondents at National Level.

Screen 1 - Introduction and Background	
Screen 2 - Collection of knowledge	
Please enter the title or internet address of any relevant documents in the below text box, or upload documents to this questionnaire by using the below 'upload' button	
An important part of our study focuses on the analysis of available data, reports and studies <u>related to environmental claims in your country</u>. Would you have the possibility to provide us with any of the following relevant documents in particular? Reports and other publications from public institutions (national authorities, regulatory bodies, competition or trade authorities, etc.) Reports and studies from research or consumer organisations, NGOs, think tanks, industry bodies, standards organisations, etc. Academic publications including books, articles, theses and working papers Databases, data sets resulting from previous data collection exercises, etc. Other related documents	- OPEN TEXT BOX (WHICH IS BIG ENOUGH THAT RESPONDENTS REALISE THAT THEY CAN WRITE A LOT IN THIS BOX IF THEY WANT) - UPLOAD BUTTON TO BE SHOWN BELOW THIS TEXT BOX, SO THAT RESPONDENTS CAN UPLOAD FILES. THIS BUTTON SHOULD MAKE IT CLEAR THAT THEY CAN ADD MULTIPLE FILES.

Screen 3 - Guidelines and Codes of Conduct	
The Unfair Commercial Practices Directive (UCPD) is the main EU legislation used to assess environmental claims. Do you have any recommendations for how the UCPD and its guidance could be improved in the context of environmental claims in your country?	OPEN TEXT BOX

Please list any guidelines/codes of conduct that you are aware of on the use of environmental claims in marketing or on products?	(QUESTION FOR MINISTRIES, PUBLIC AGENCIES, CONSUMER ORGANISATIONS, REGULATORY BODIES, AND ADVERTISING ASSOCIATIONS) Open box, where guidelines can be listed
Considering your business sector in particular, please list any guidelines/codes of conduct that you are aware of on the use of environmental claims in marketing or on products?	(QUESTION FOR BUSINESS ORGANISATIONS, AND COMPANIES) Open box, where guidelines can be listed and documents can be uploaded

Screen 4 – Complaints about misleading environmental claims	
Did your organisation ever receive complaints from consumers or companies regarding environmental claims?	3. Yes 4. No
Of the following list, please list up to three complaints which you most commonly received regarding environmental claims?	(ASK IF CODE 1 – "receive complaints") 13. Not truthful 14. Exaggerating the environmental performance of the product/service 15. Not accurate 16. Having insufficient scientific evidence to support the environmental claim 17. Hiding any trade-offs or negative impacts on the environment 18. Not providing sufficient information e.g. about product's energy consumption or total environmental impact 19. Displaying a trust mark, quality mark or equivalent without having obtained the necessary authorization 20. Claiming that a product/service has been approved, endorsed or authorised by a public or private body, when this is not the case 21. Claiming to be a signatory of a code of conduct when the trader is not 22. Claiming that a code of conduct has an endorsement from a public or other body which it does not have 23. Use of an environmental claim, label or symbol that can cause confusion with official marks 24. Other (specify)
Upon receiving consumer complaints, what actions does your organisation most commonly take?	(ASK IF CODE 1 – "receive complaints") OPEN ANSWER BOX

Screen 5 - The European Consumer Summit: Multi-stakeholder Dialogue on Environmental Claims	
In March 2013, the European Commission held 'the Consumer Summit' including a dialogue with stakeholders on the issue of environmental claims and recommendations for the future. If you wish to know more, then the report of this multi-stakeholder process with the main findings and conclusions can be found at: http://ec.europa.eu/consumers/documents/consumer-summit-2013-mdec-report_en.pdf	
According to this dialogue, there are 9 key principles that should be taken into account when developing and implementing environmental claims. Claim substantiation Reliability Relevance and usefulness Transparency Clarity Proportionality Accessibility Completeness Comparability Taking these 9 principles into account, please list up to 3 product or brand names whose environmental claims can be considered 'best practice', with a brief rationale for choosing each one.	OPEN TEXT BOX, WITH UP TO 3 ROWS AVAILABLE
And taking these same 9 principles into account, please list up to 3 product or brand names whose environmental claims that can be considered as 'worst practice' (i.e. a misleading claim that meets none/few of the above principles), with a brief rationale for choosing each one.	OPEN TEXT BOX, WITH UP TO 3 ROWS AVAILABLE
Considering the past 5 or 10 years, what are the key trends that you have you noticed with regards to environmental claims in your country or industry sector? *Please answer this openly, according to your personal perception*	OPEN ANSWER
What more do you think could be done at	OPEN ANSWER

EU level to contribute to informed green choices, and to help prevent misleading environmental claims?	

Screen 6	
Please feel free to suggest in the following text box the name of an expert or organization who you feel that we could also contact for stakeholder input.	OPEN ANSWER

3.1.3 Data validation

The following actions were taken in order to increase the validity of the data collected:

- A computer-assisted script in which both data from telephone interviews and online interviews could be entered. Moreover, incoming paper questionnaires were also added in the same system. This measure allows the comparison of data entered by different stakeholders.
- The application of a computer-assisted script ensured that questions were routed appropriately and illogical answers were prevented.
- Stakeholders were able to choose which data collection method they preferred (online, telephone, on paper) and at which moment it suited them best to answer the questionnaire. They were also able to upload documents to present their findings.
- As outlined above, several actions to increase response were taken, in order to maximize the output being gathered through the stakeholder interviews.
- The questionnaire content was customized toward the stakeholders interviewed. In addition, the questionnaire was largely similar to that used for the EU Level stakeholders in order to allow comparison between both.
- Both the questionnaire and the list of contacts were approved by the European Commission.
  The data resulting from the stakeholder interviews is not considered to be representative, due to the small sample sizes and the non-equal sampling probability, but is used to demonstrate certain points or frame other results.