

Sustainability Research

Prepared by
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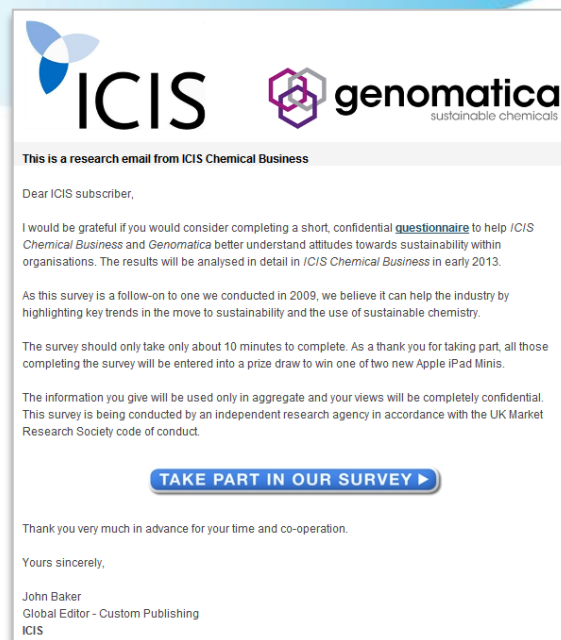
On behalf of
Steve Weiss, Genomatica Inc.

An article discussing these findings was published in *ICIS Chemical Business* on 21 January 2013.
To view the article click on: [ICIS green survey](#)



Sample & Methodology

- In order to provide a robust sample for the study, research was conducted via a quantitative online questionnaire amongst hospitality professionals.
- In total **702** respondents participated in the survey.
- A branded email was sent to a sample drawn from the ICIS database inviting potential respondents to take part in the online questionnaire.
- The fieldwork was conducted between 12th – 23rd November 2012.
- Results are shown on those answering each question.



Screenshot of the email

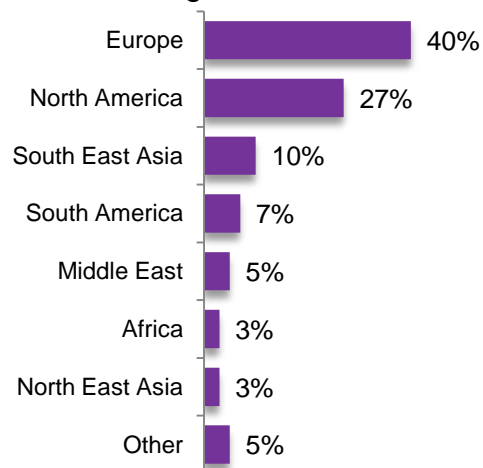
A screenshot of the survey questionnaire. At the top are the logos for ICIS and Genomatica (sustainable chemicals). Below the logos, the title "Sustainability Research" is displayed. The first question is "Does your company have a sustainability strategy / policy?". It has four radio button options: "Yes - there is a sustainability strategy / policy already in place", "Yes - we are currently developing a sustainability strategy / policy", "No - but we are likely to develop a policy over the next 2 - 3 years", and "No - there is little interest at the moment". The second question is "What are the sustainable initiatives within your organisation over the next five years? (please tick all that apply)". It has several checkboxes: "Use / increase bio based / renewable content in materials", "Use / increase recycled raw material", "Develop biodegradable products", "Develop new products that last longer", "Reduce / eliminate the use of toxic chemicals", "Improve processes (by reducing energy use, waste)", "None", and "Other (Please tick and specify below)". There is a text input field for the "Other" option. At the bottom, there is a "Next >>" button and a small copyright notice: "Copyright © 2012 Reed Business Information Ltd. All rights reserved."

Screenshot of the survey

* Those who are based in the UK and are at least involved in purchasing decisions

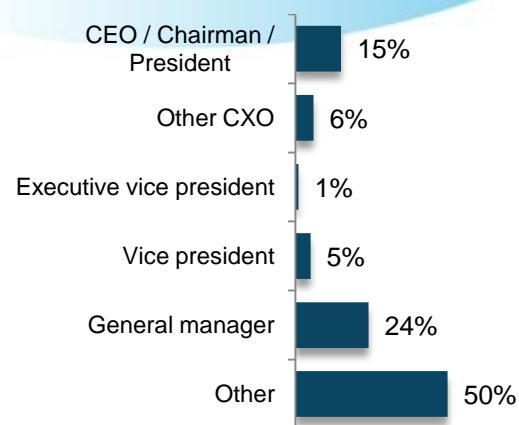
Respondent Profile

Region



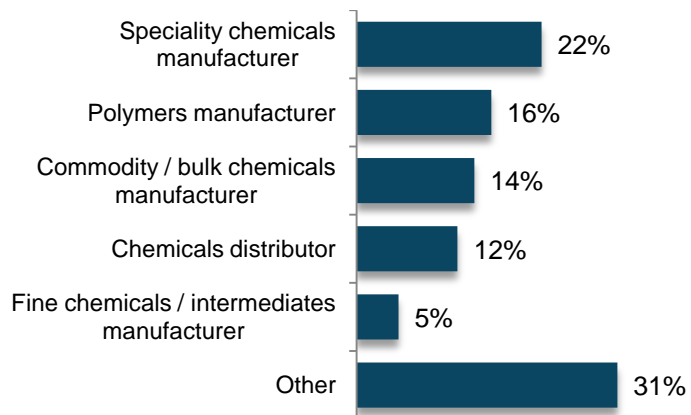
Base: all responding (450)

Job title



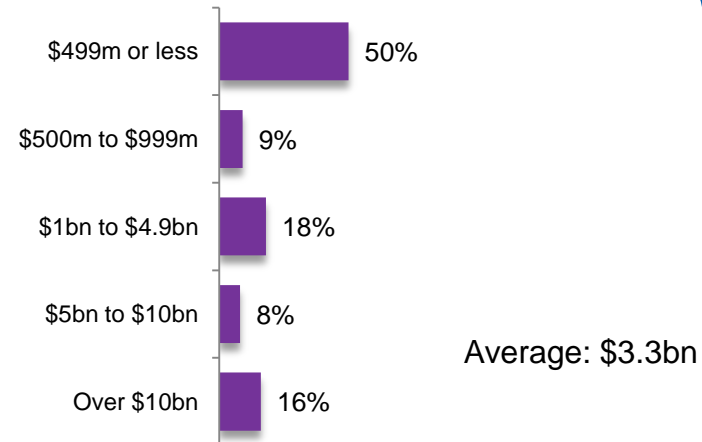
Base: all responding (436)

Type of company



Base: all responding (436)

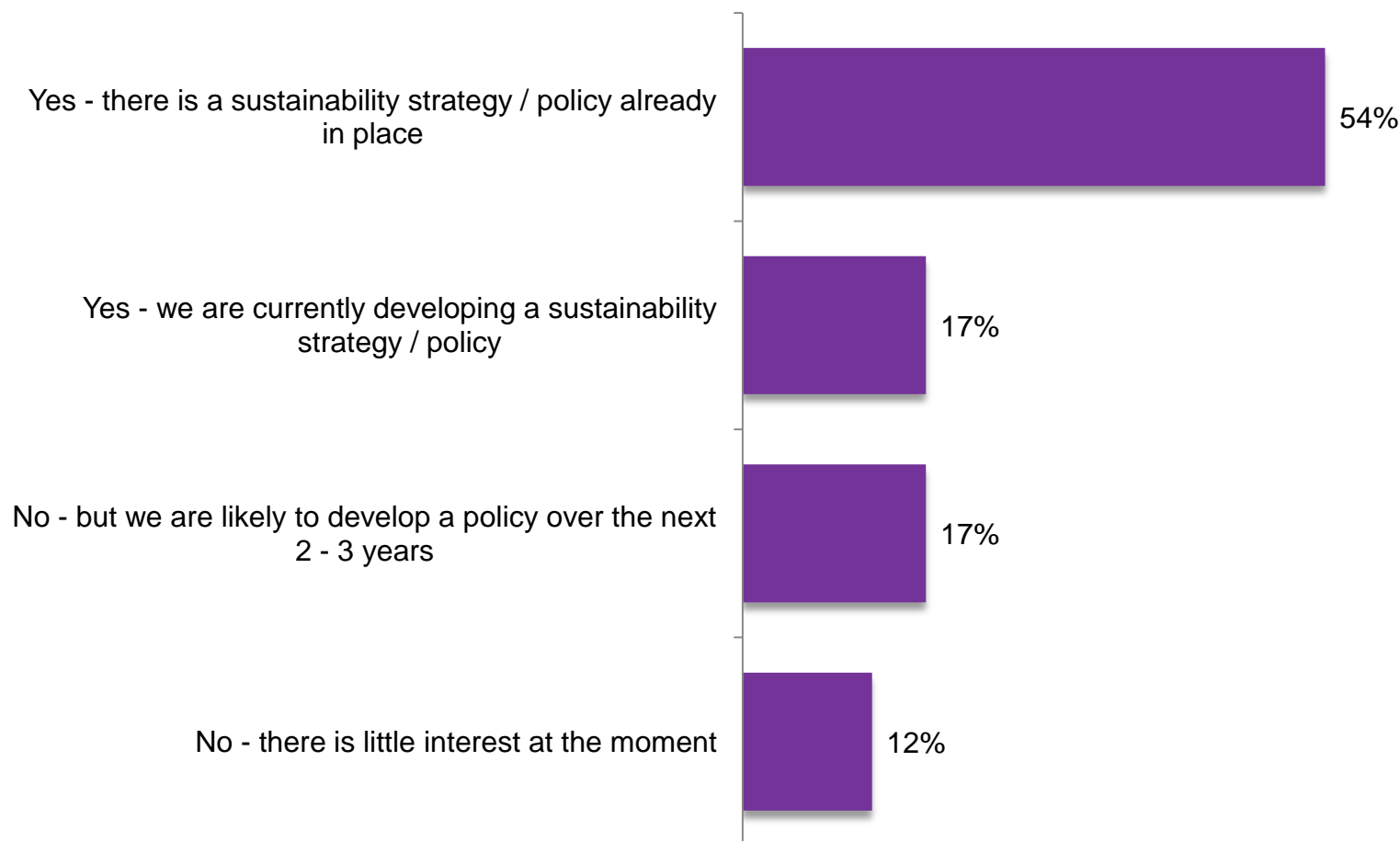
Global revenue



Base: all responding (434)

Main Findings

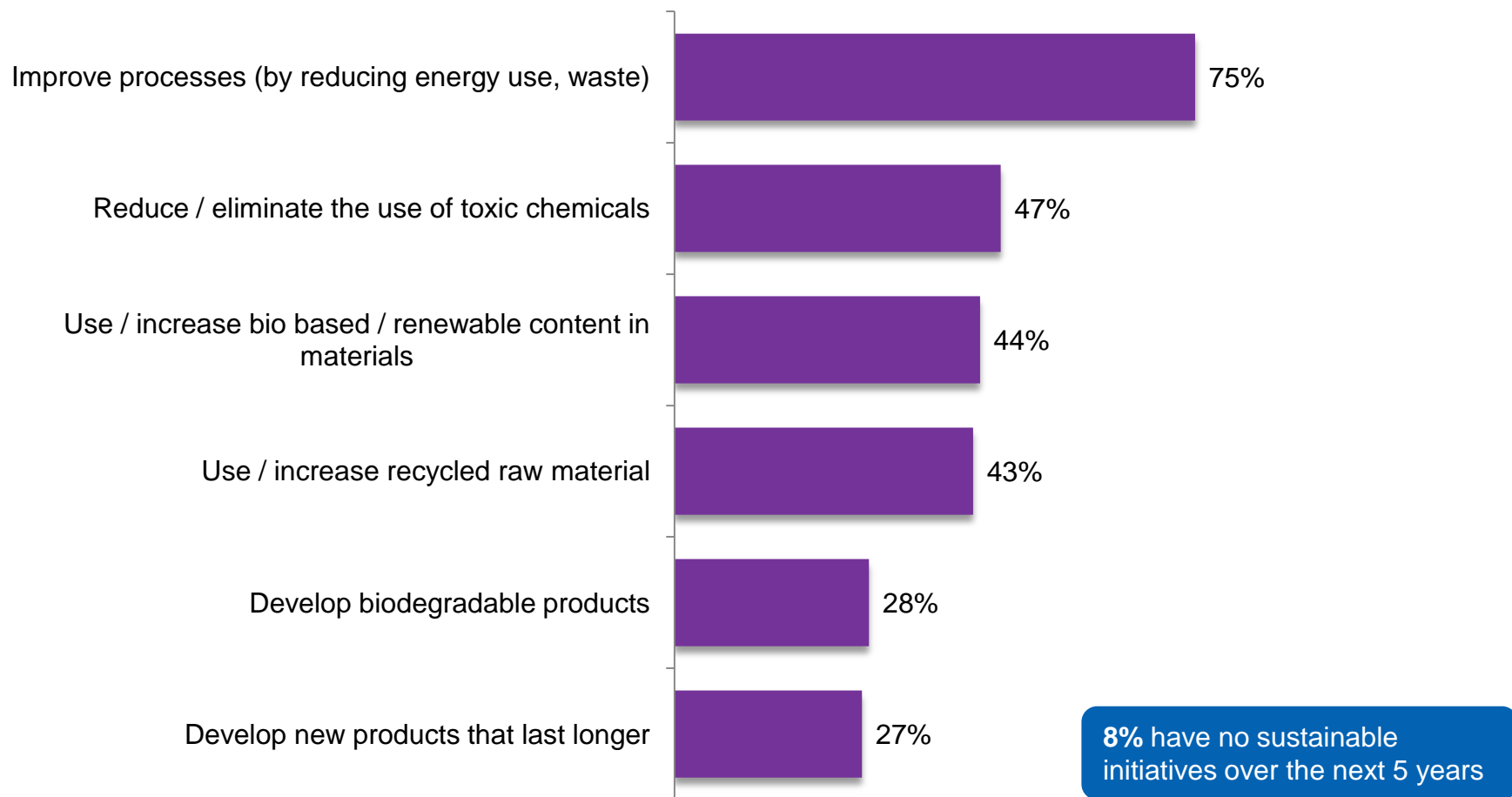
Whether the company has a sustainability strategy/policy



Q. Does your company have a sustainability strategy / policy?

Base: all responding (702)

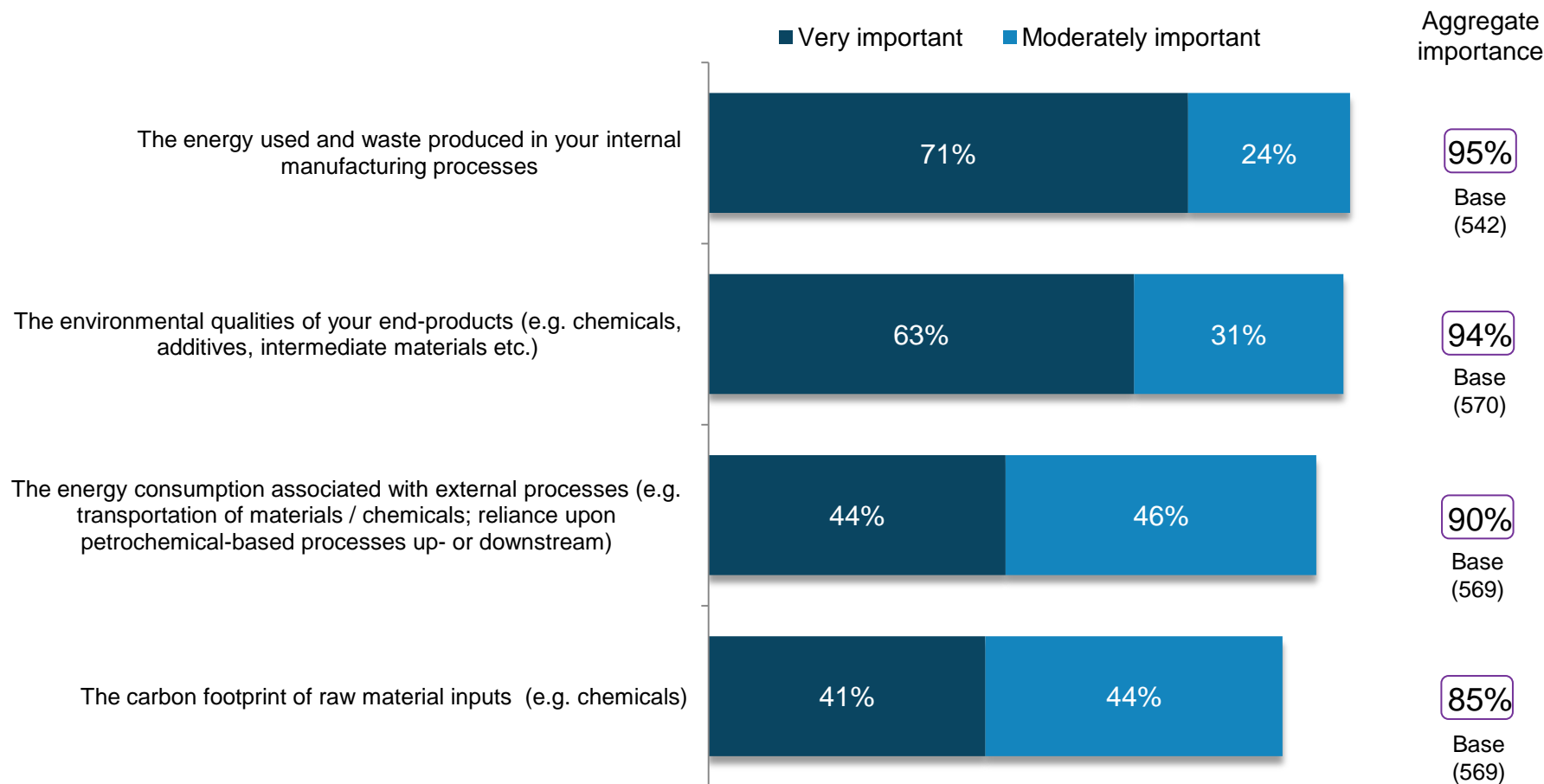
Sustainable initiatives over the next 5 years



Q. What are the sustainable initiatives within your organisation over the next 5 years?

Base: excluding 'none' (642)

Importance of factors in defining sustainability



Q. How important are each of the following factors in how your company defines sustainability?

Base: all responding (shown)

Other important factors

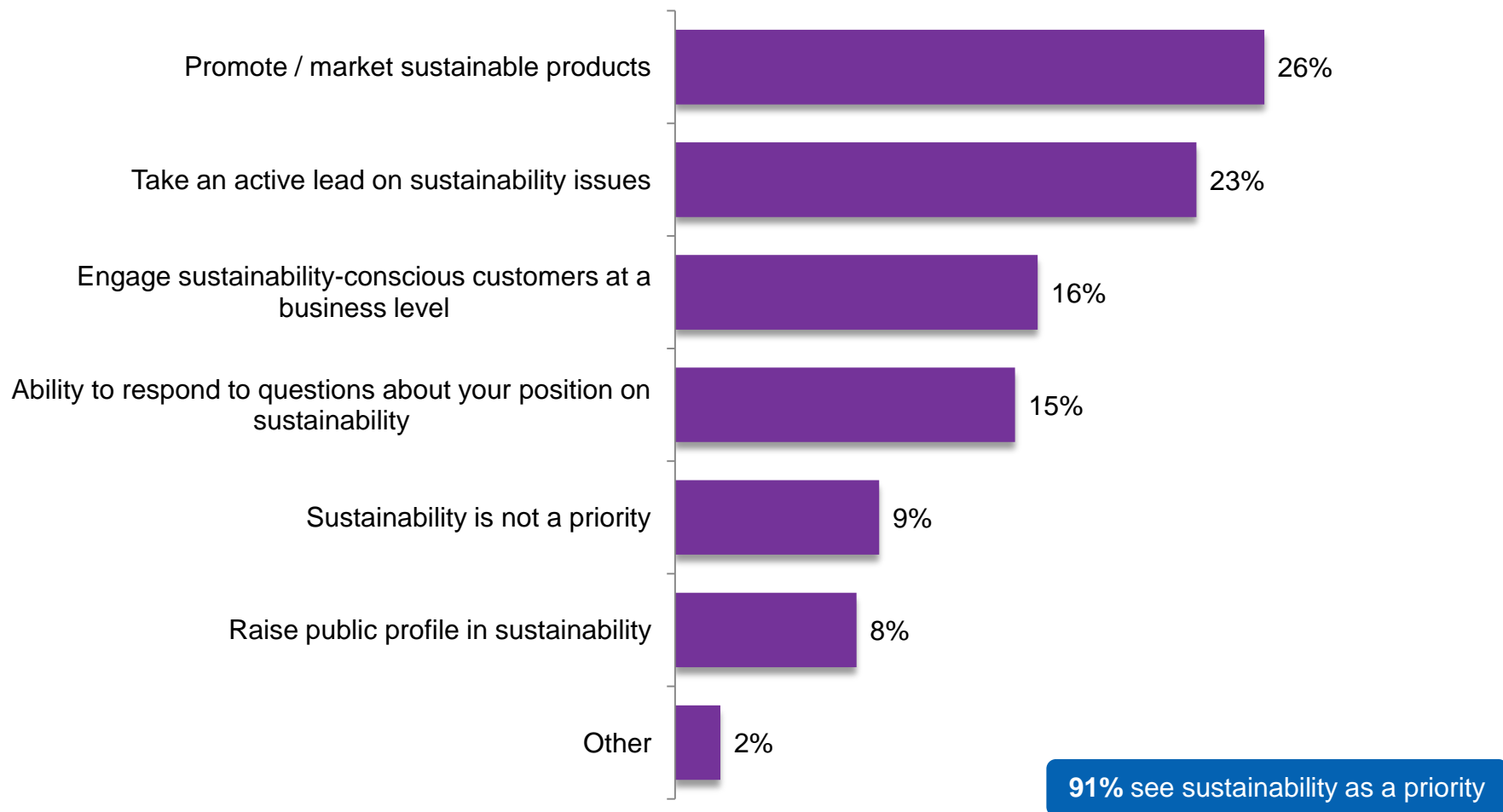
“Product safety; Regulatory compliance; Workplace safety; Responsible sourcing; Biodiversity; Human rights; local community support.”

“We need to listen to our customers in feed, agricultural industries, and take into account changing attitudes amongst consumers and NGO's.”

“Sustainability is broader than only the environmental metrics, and needs to consider economic and social aspects as well.”

Q. Are there any other factors that are important in how your company defines sustainability?

Top business priority in terms of sustainability

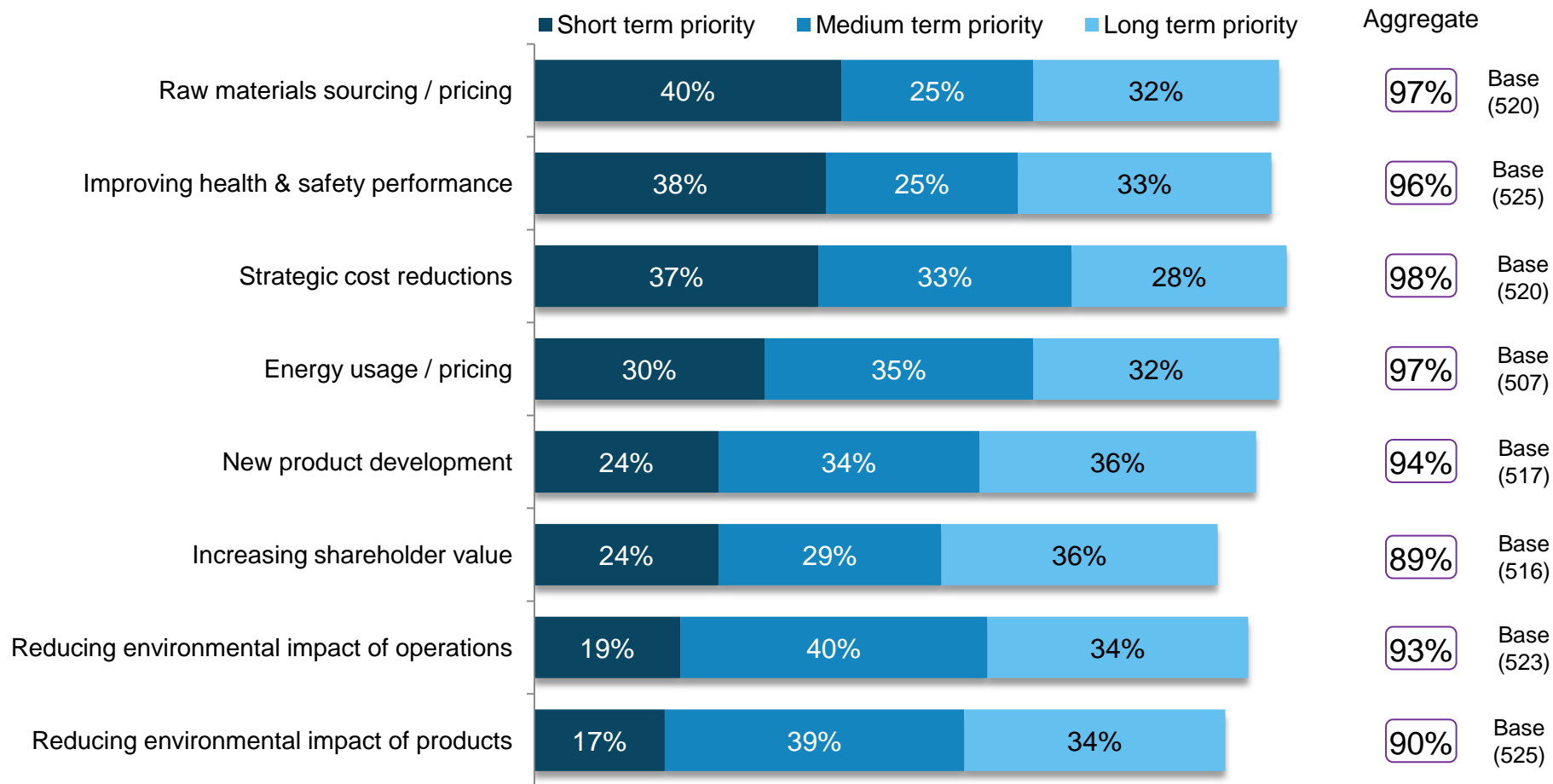


Q. Which of the following best describes your company's top business priority in terms of sustainability?

Base: all responding (560)

10

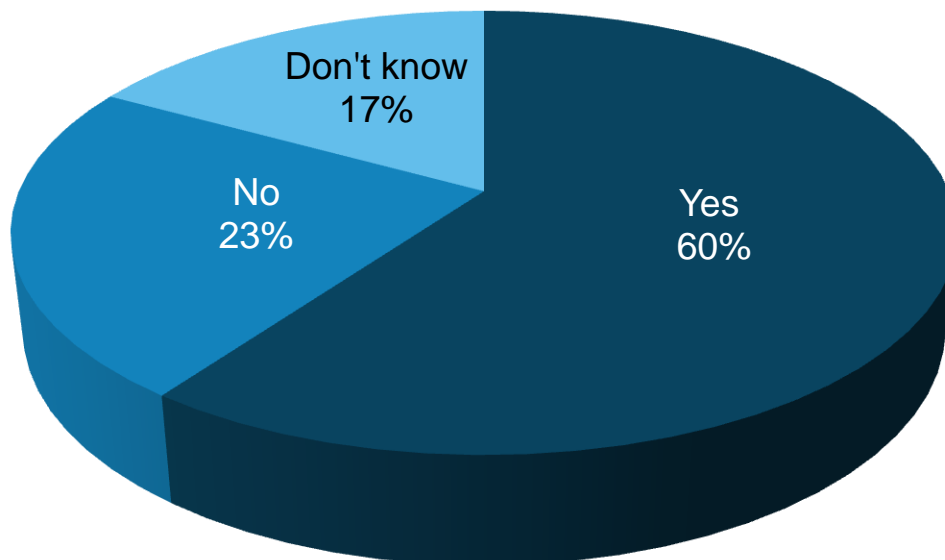
Short, medium and long term priorities



Q. Please indicate whether the following factors are short, medium or long term priorities for your company?

Base: all responding (shown)

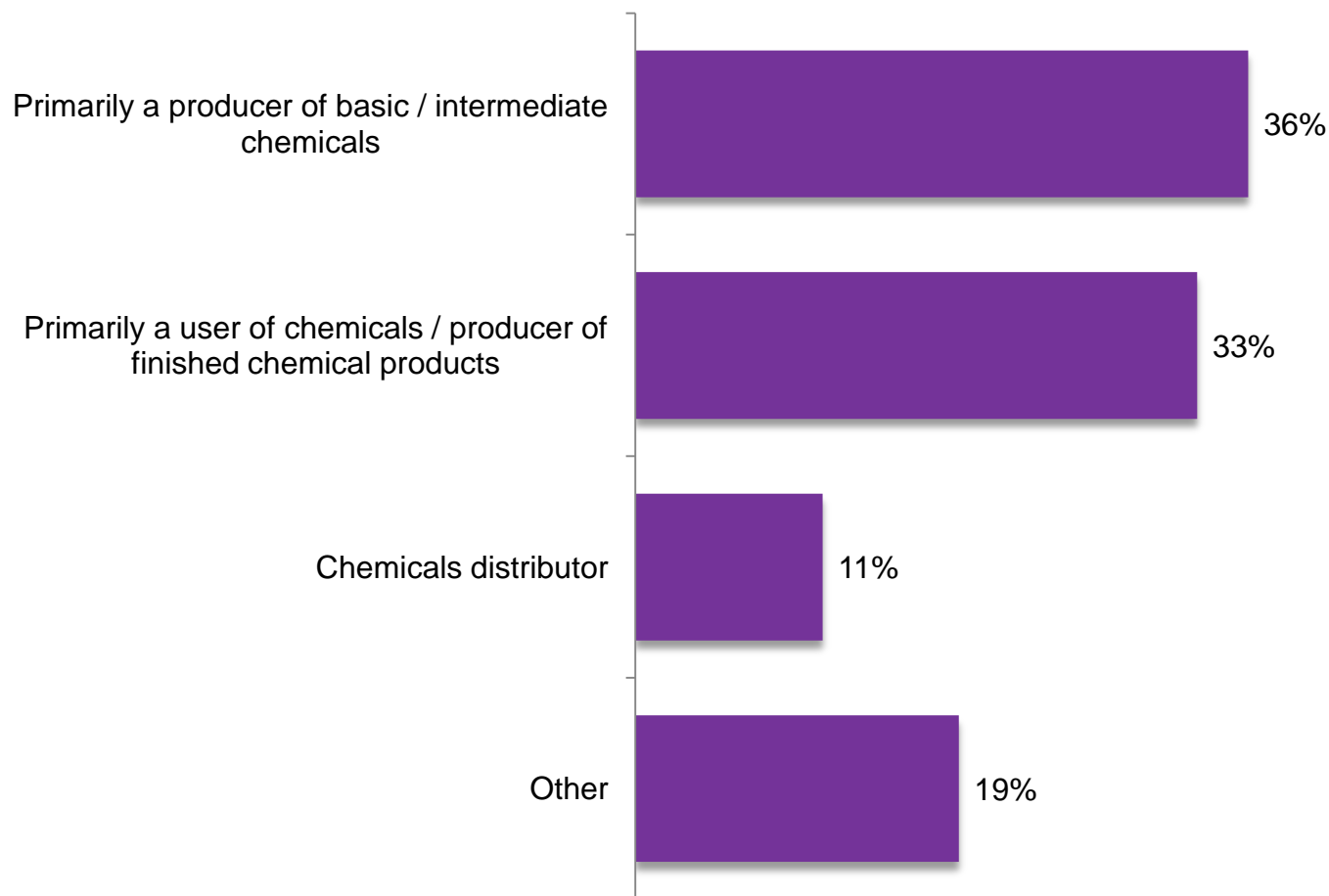
Engagement in sustainable chemistry practices



Q. Is your company already engaged in sustainable chemistry practices?

Base: all responding (530)

Is your company ... ?

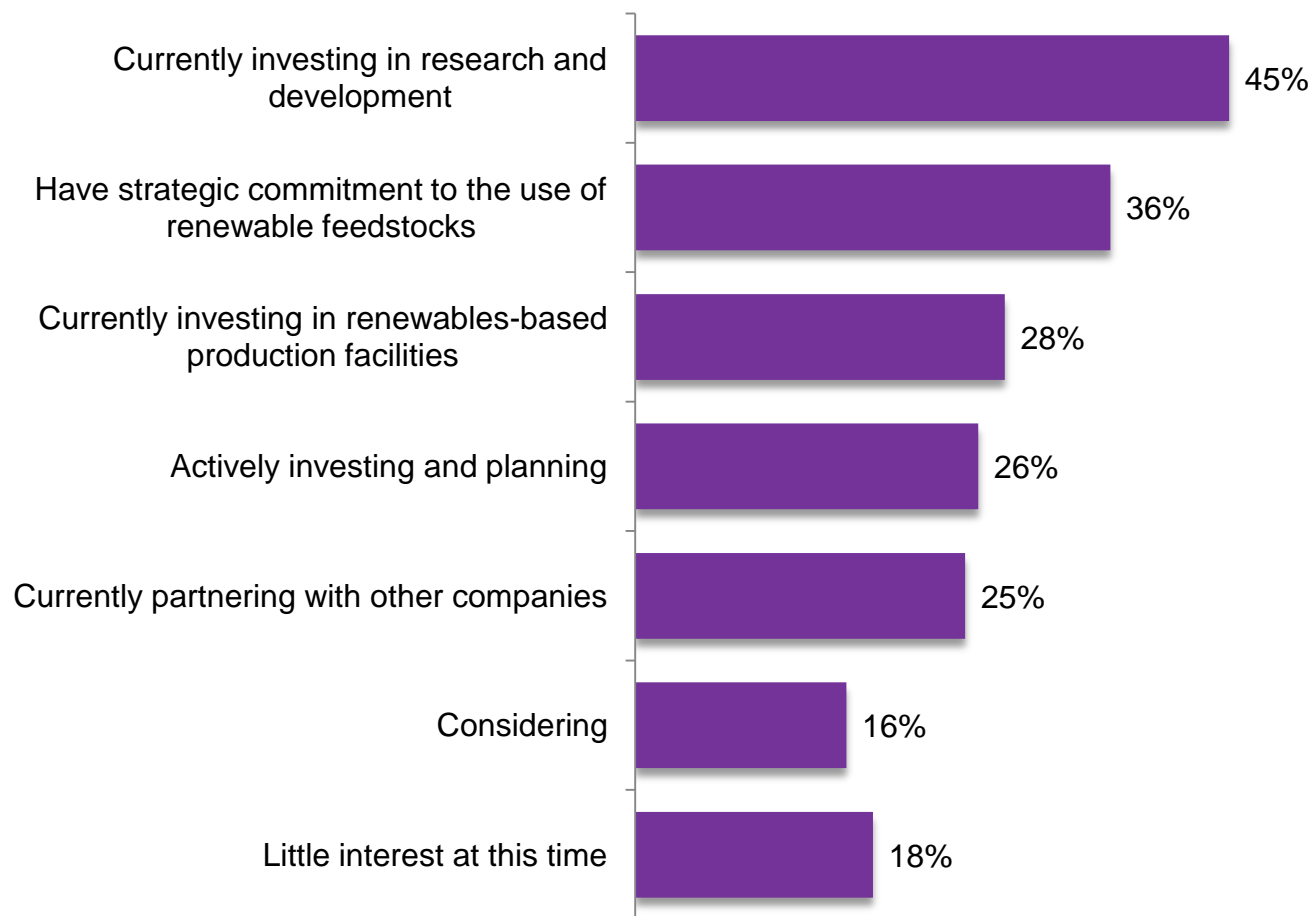


Q. Is your company

Base: all responding (533)

Producers of basic/intermediate chemicals

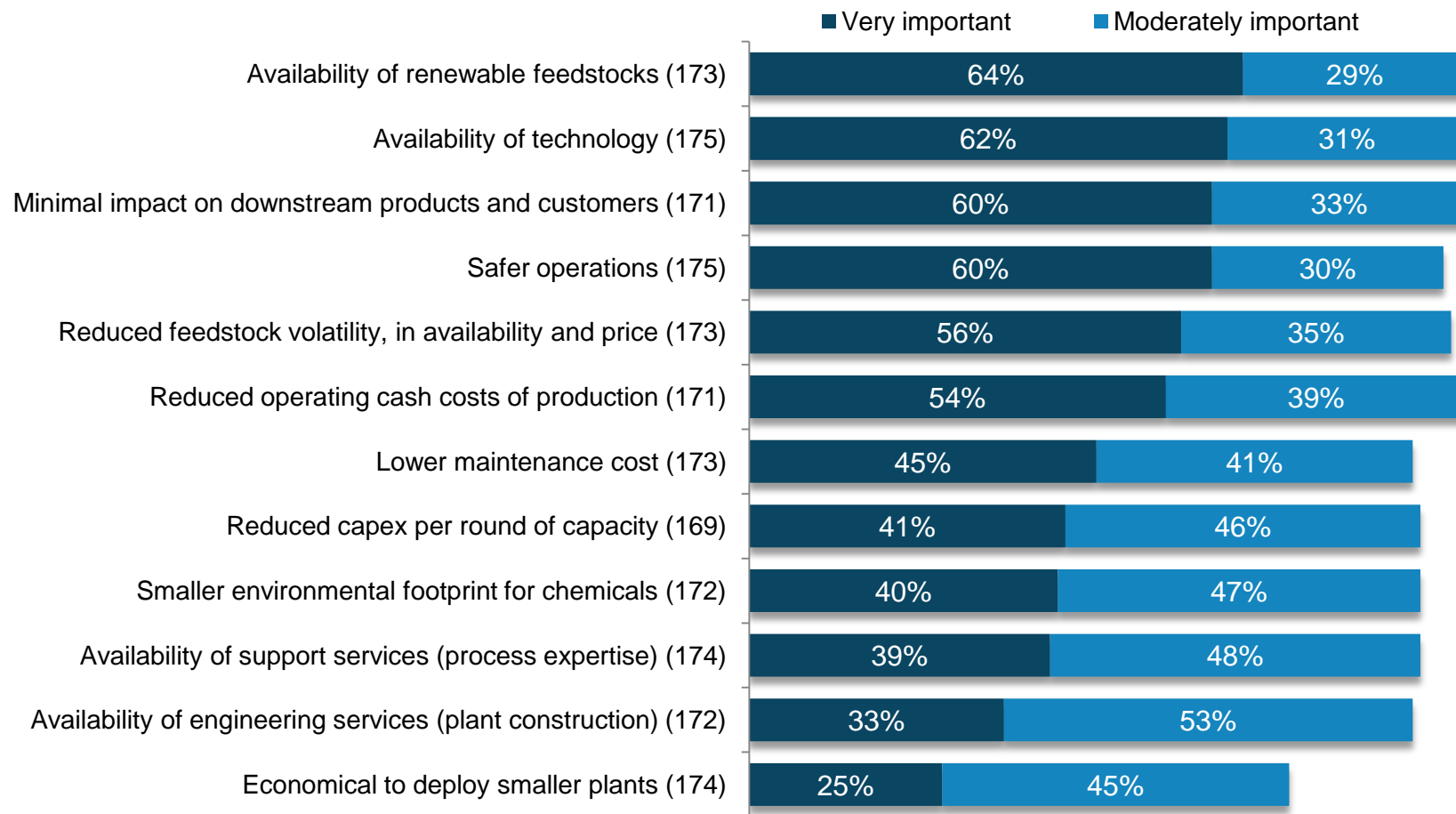
Company strategy regarding use of renewable feedstocks



Q. Which of the following describes your company's strategy with regard to the use of renewable feedstocks, such as sugars, starches or biomass?

Base: producers of chemicals (190)

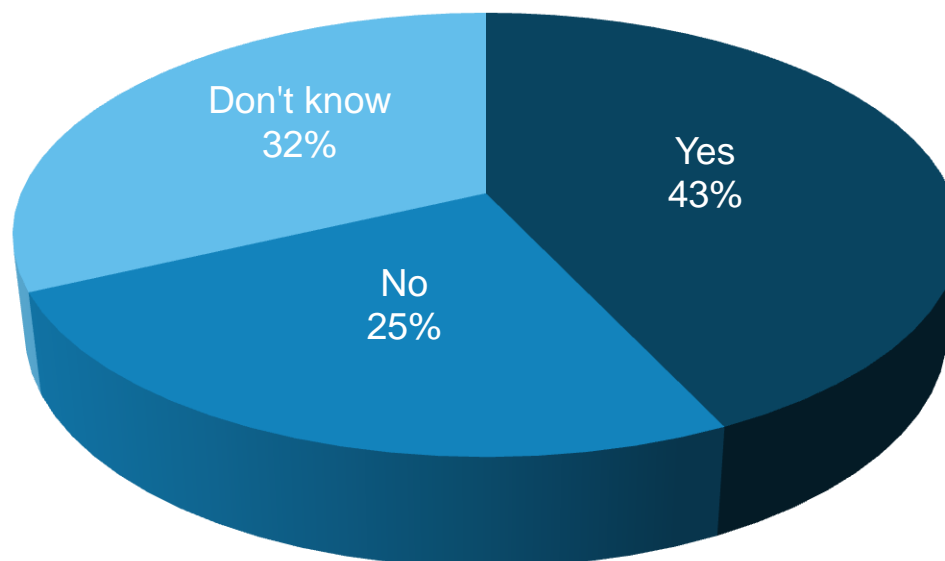
Importance of factors when considering renewable-based production



Q. How important are each of the following factors when considering renewable-based production?

Base: producers of chemicals (shown)

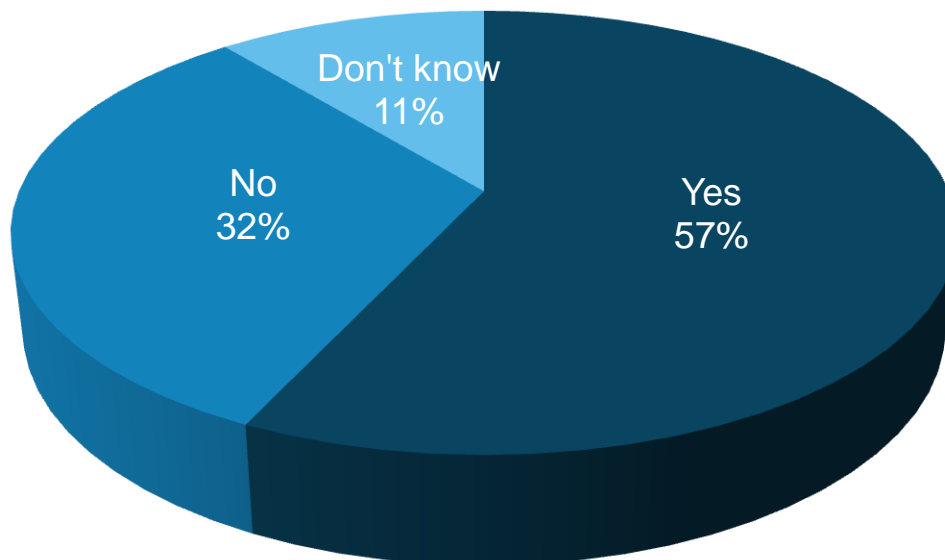
Long-term economic advantage in switching to renewable feedstocks



Q. In your opinion, will there be long term economic advantage to you in switching chemical manufacturing process inputs to renewable feedstocks, like sugars, starches or biomass?

Base: producers of chemicals (166)

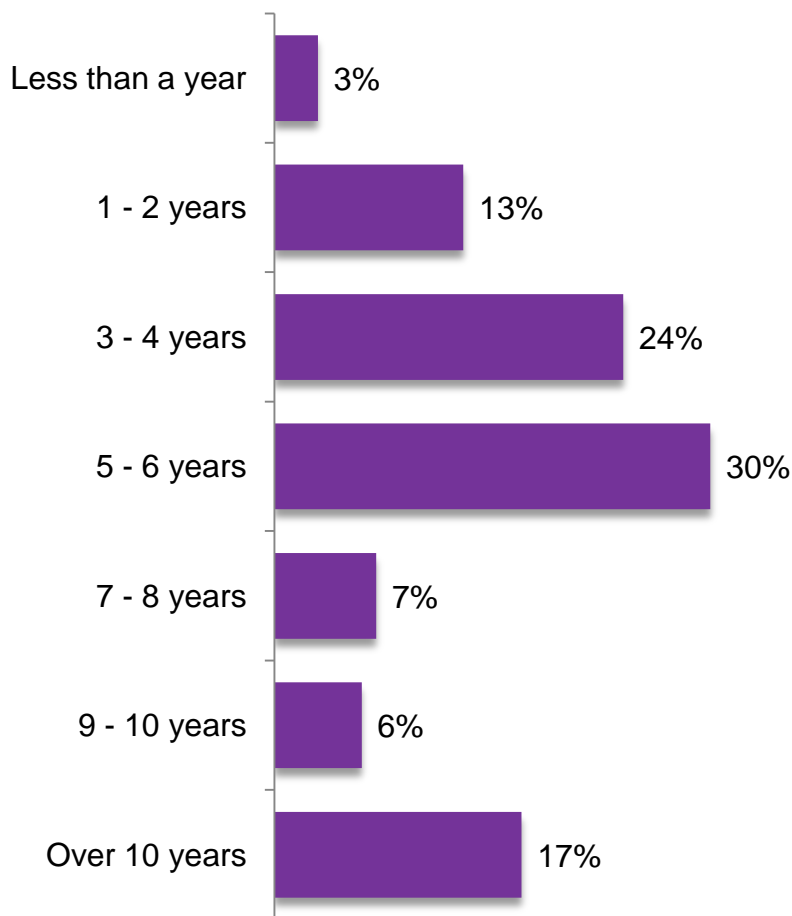
Reducing exposure to the petroleum-based commodity market



Q. In your opinion, should your company reduce its exposure to the petroleum-based commodity market?

Base: producers of chemicals (176)

Time from launching a sustainable program to using it at commercial volume

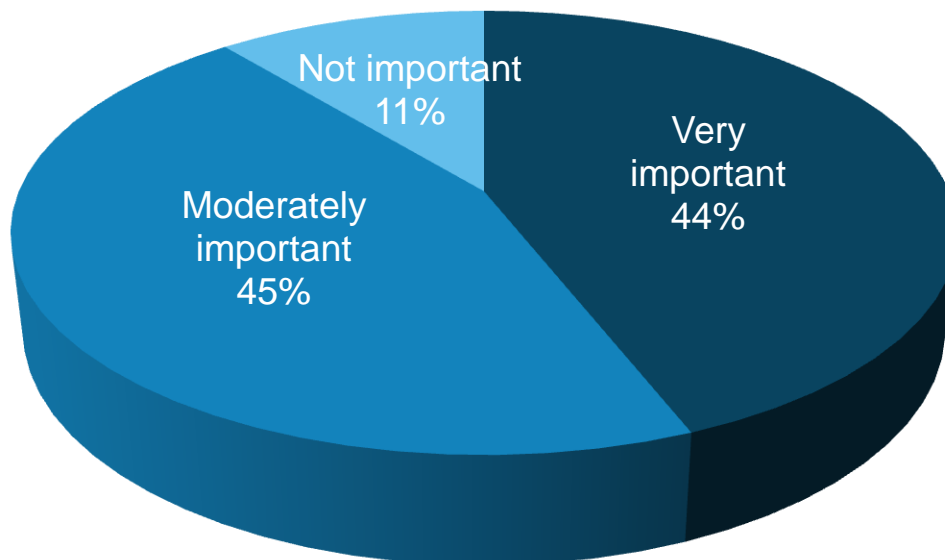


Average: 5 years

Q. In your opinion, how long would it take from launching a sustainable program to using such processes at commercial volume?

Base: producers of chemicals (176)

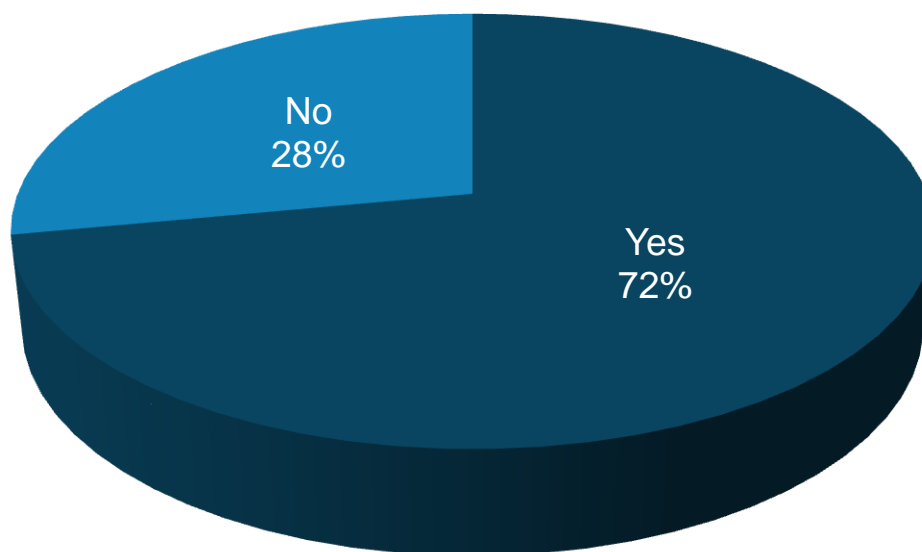
Importance of being a front-runner in sustainable chemicals



Q. How important is it for your company to be a front-runner in terms of sustainable chemicals?

Base: producers of chemicals (177)

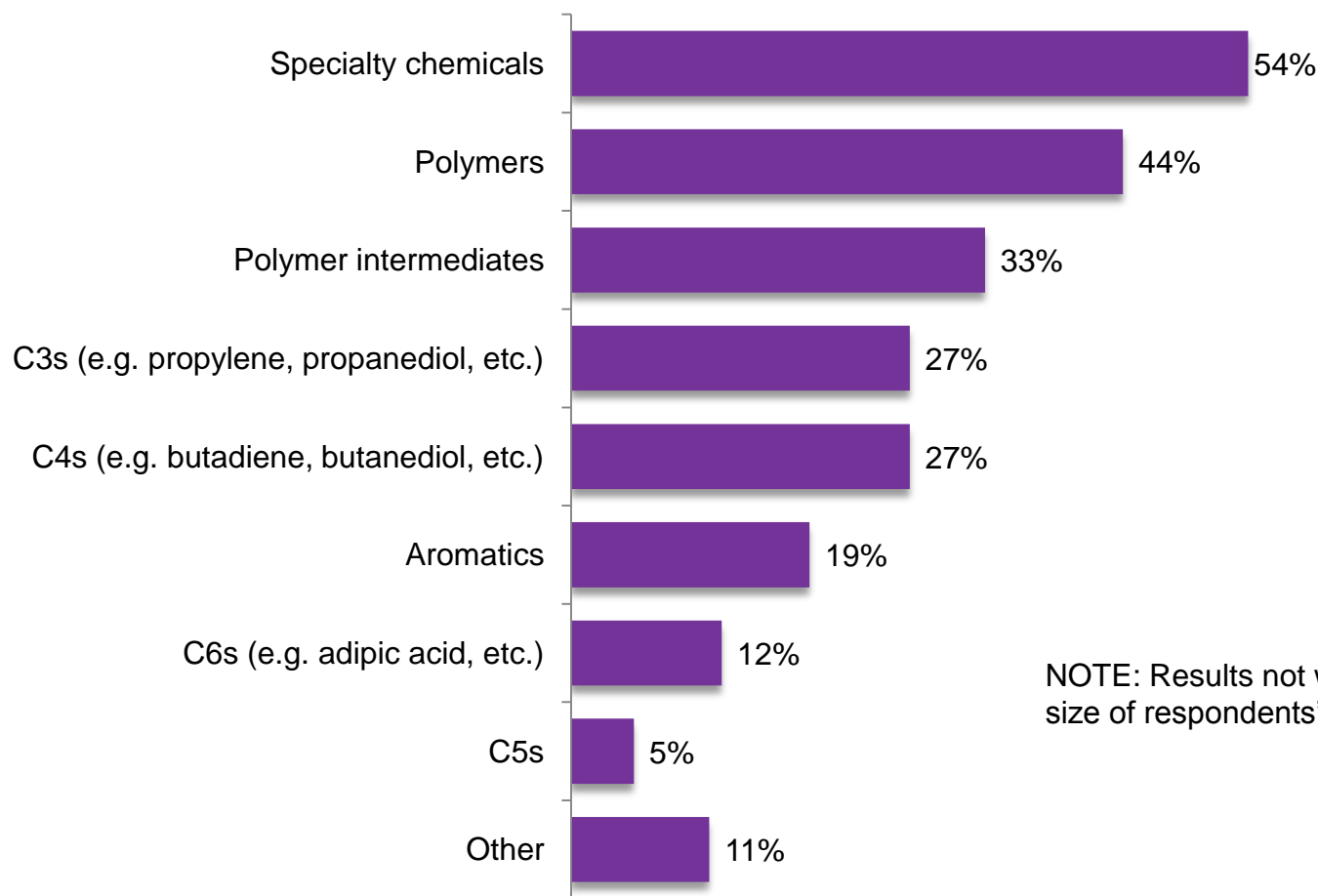
In **72%** of cases customers have expressed interest in sustainably produced chemicals.



Q. Have your customers expressed interest in sustainably produced chemicals?

Base: all responding (176)

Chemicals or classes of chemicals interested in producing using renewable feedstocks

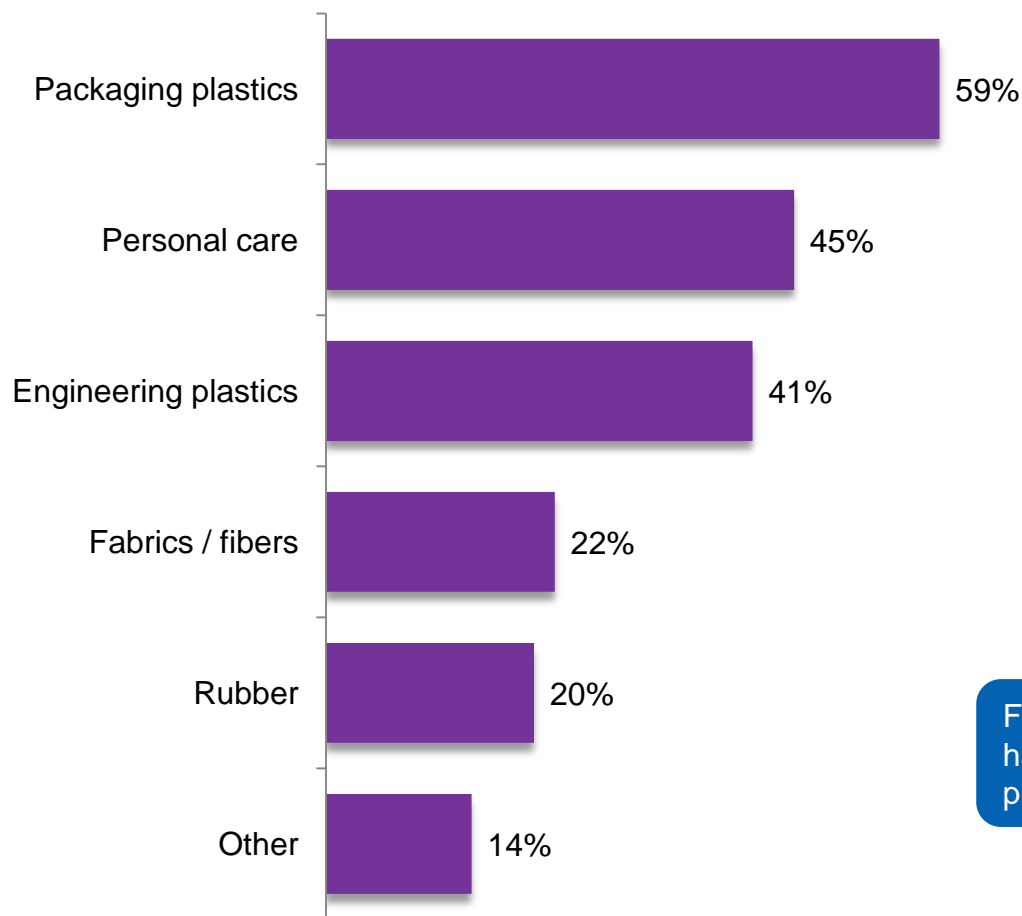


NOTE: Results not weighted for market size of respondents' companies

Q. Which chemicals or classes of chemicals are you most interested in producing, using renewable feedstocks?

Base: producers of chemicals (170)

Applications in which customers are asking for increased renewable content

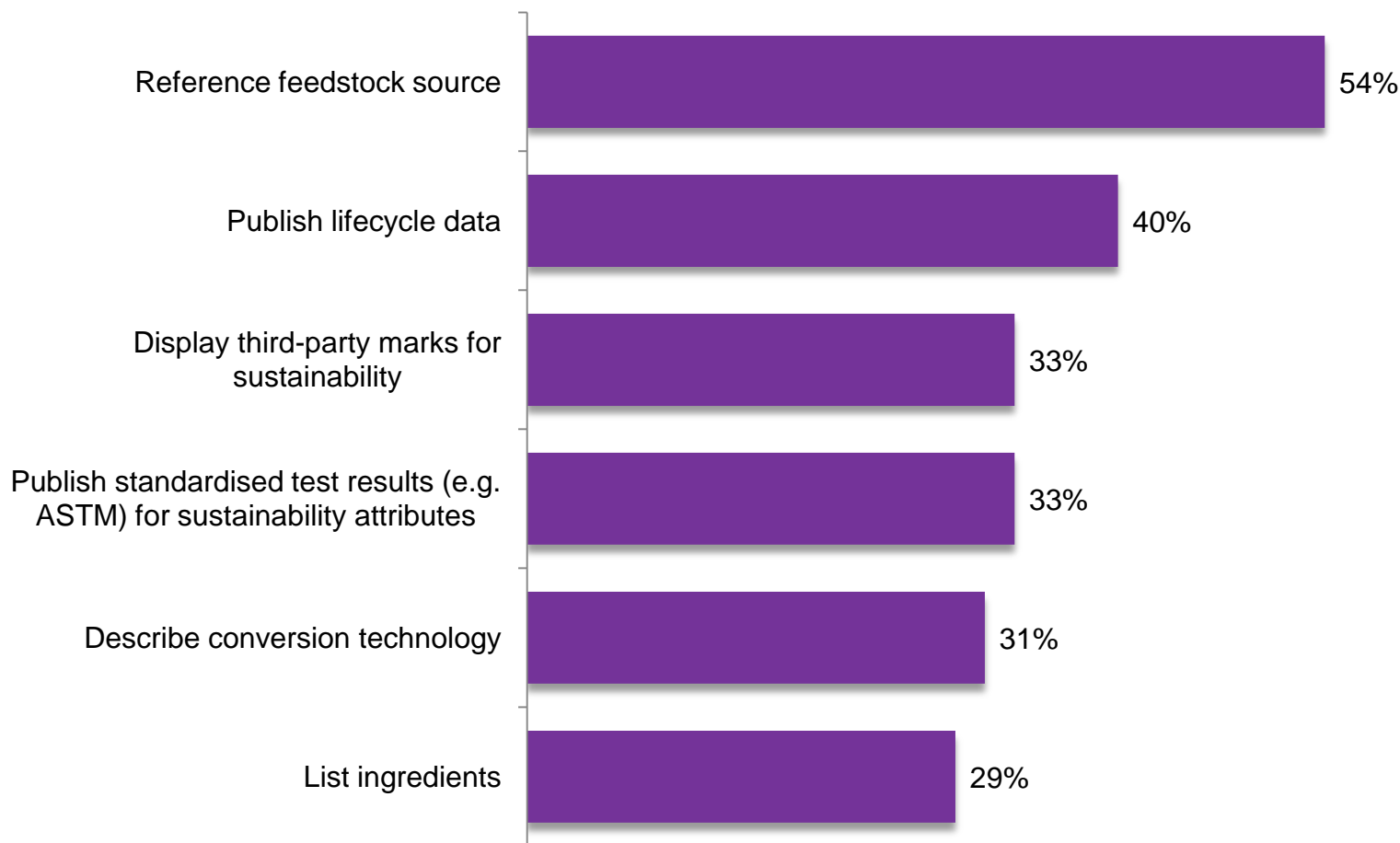


For 23%, their customers have asked for none of the prompted applications.

Q. In which applications are your customers asking for increased renewable content?

Base: excluding 'none' (132)

The most effective strategies for promoting the sustainability benefits of products

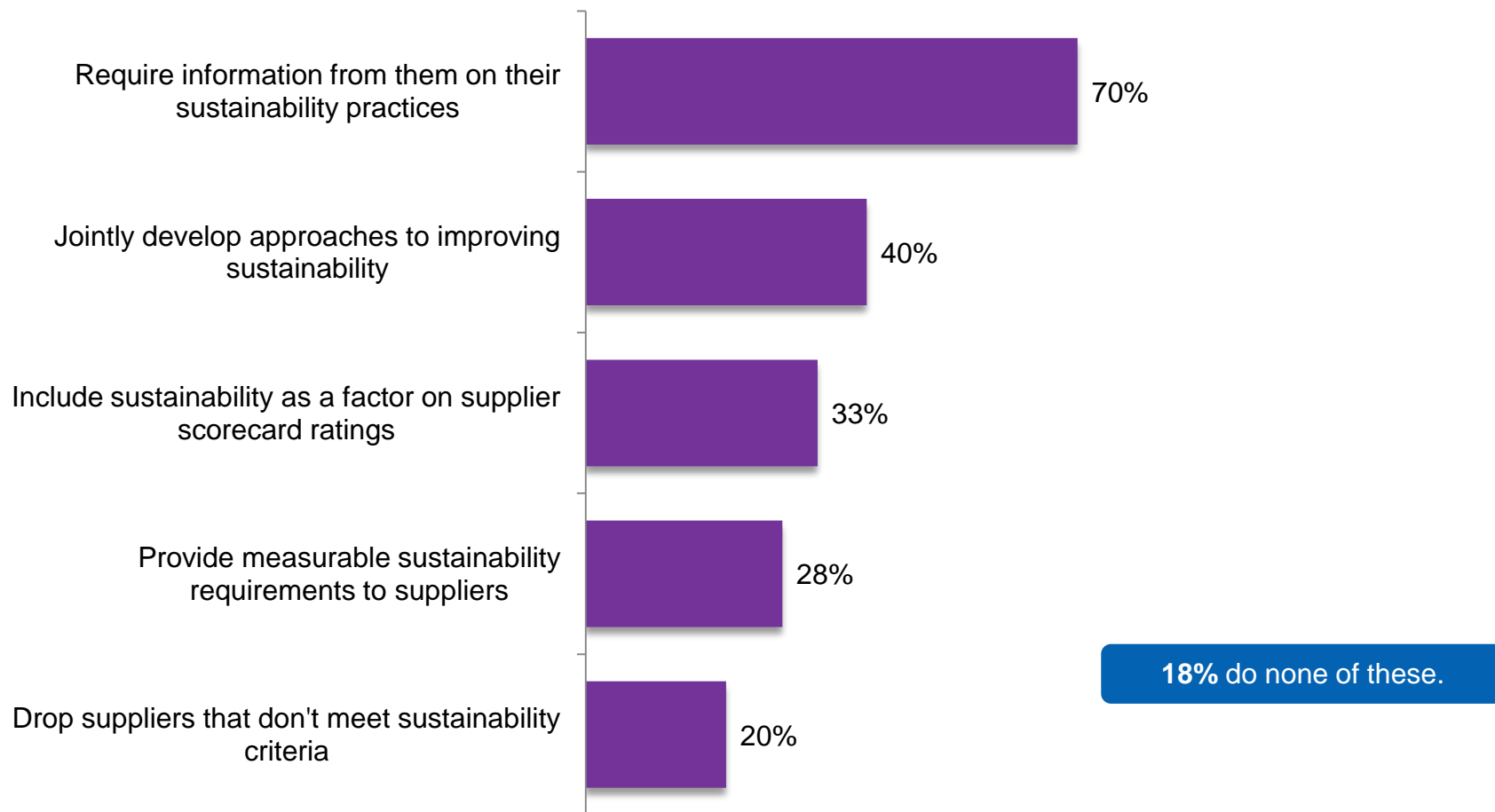


Q. Which of the following do you believe are the most effective strategies for promoting the sustainability benefits of your products?

Base: producers of chemicals (172)

Users of chemicals/producers of finished chemical products & chemical distributors

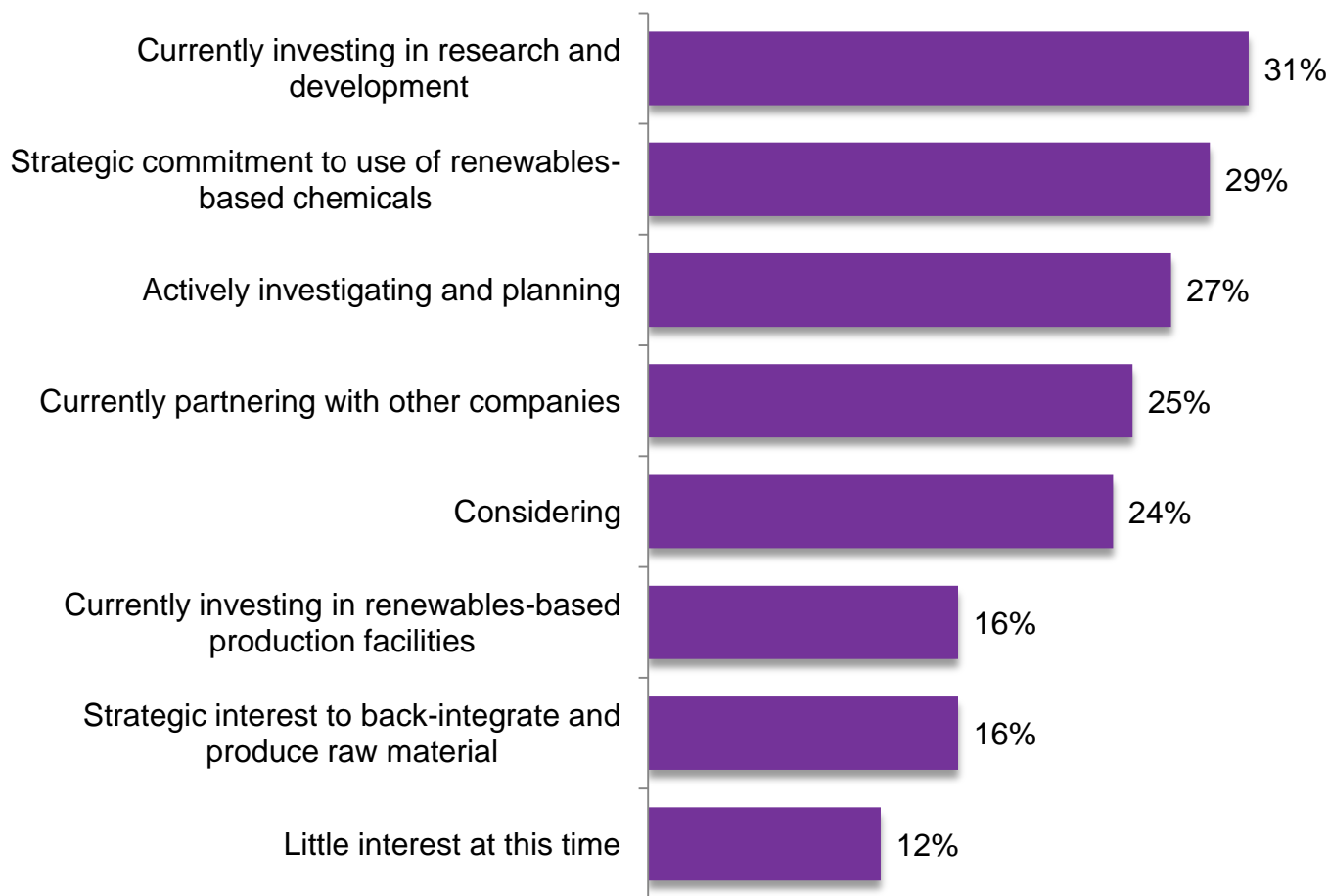
Ways of improving the sustainability of products and processes via suppliers



Q. In which of the following ways do you work with your suppliers to improve the sustainability of your products and processes?

Base: excluding 'none' (188)

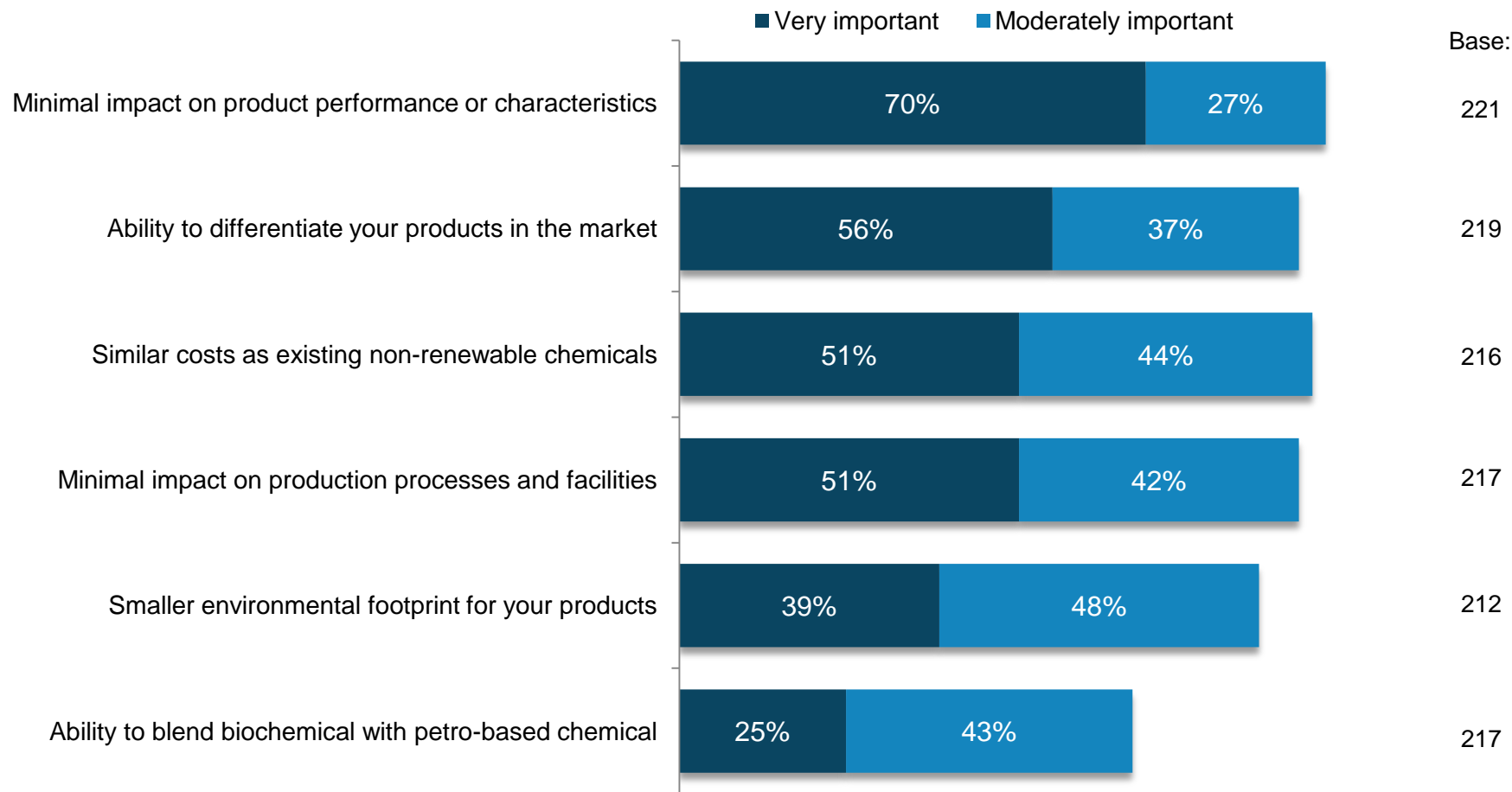
Current strategy with regard to the use of renewables-based chemicals



Base: users of chemical products/distributors (226)

Q. Which of the following best describes your current approach to use of renewable chemicals?

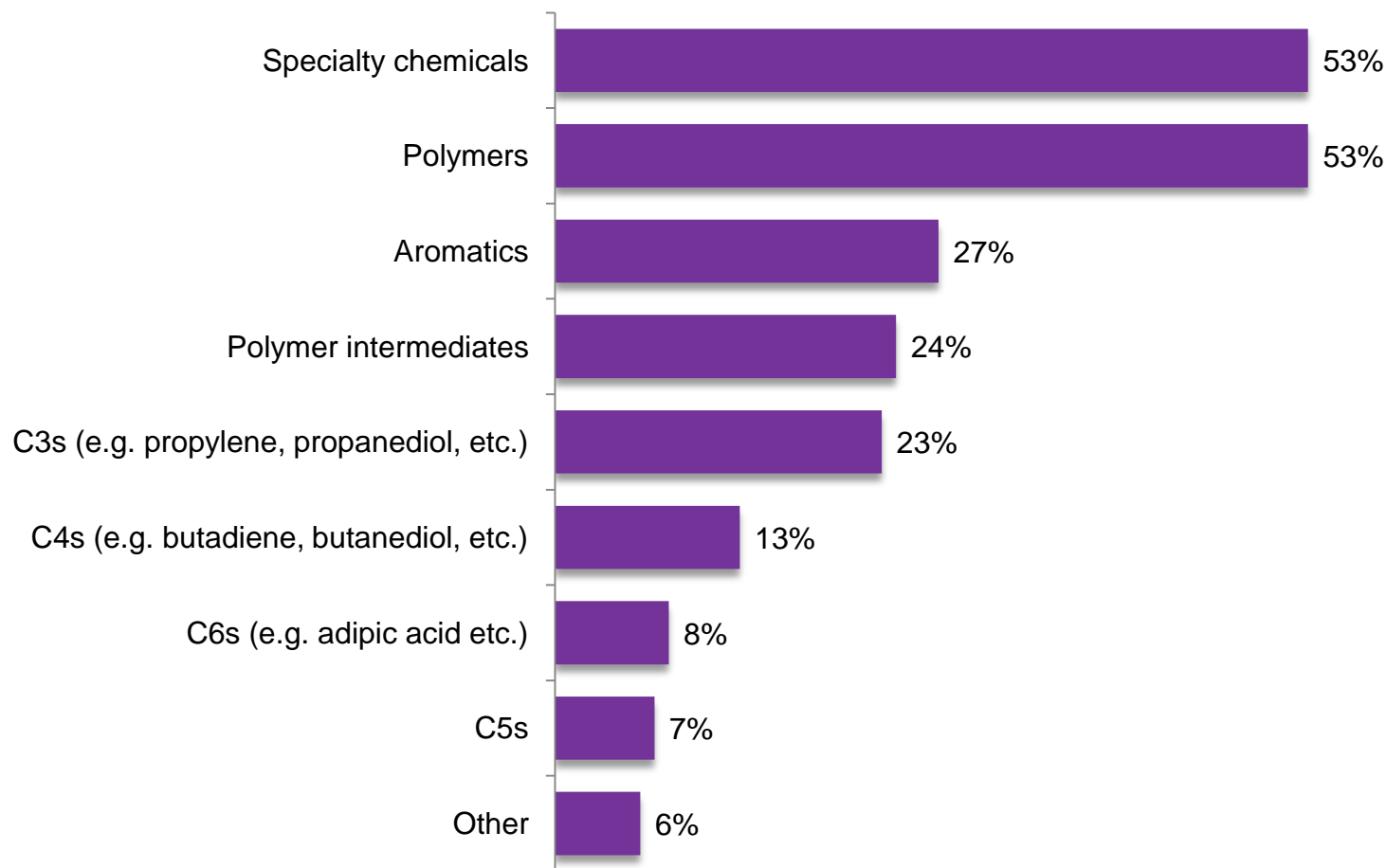
Importance of factors when considering using renewable-based chemicals



Q. How important are each of the following factors when considering using renewables-based chemicals in your products?

Base: users of chemical products/distributors (shown)

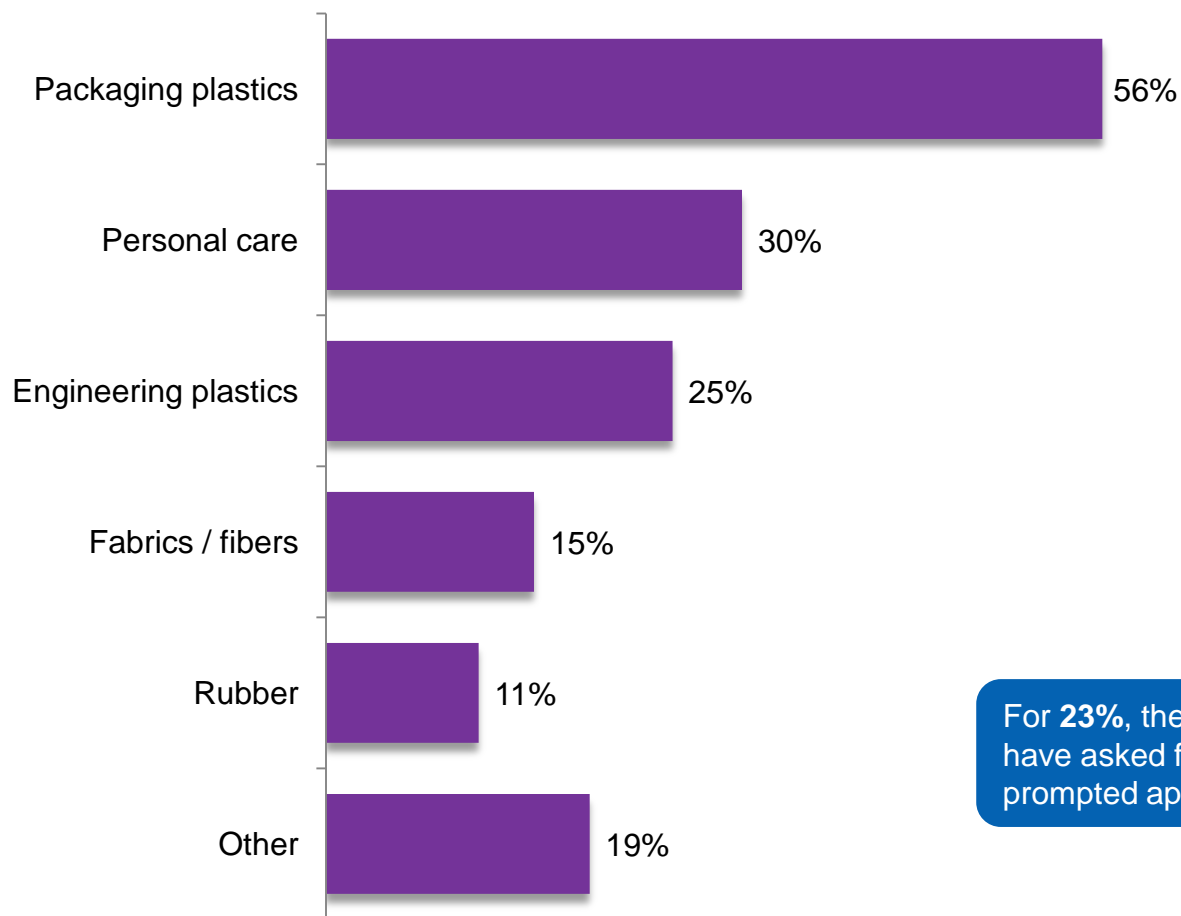
Chemicals or classes of chemicals interested in sourcing renewable versions of



Q. Which chemicals or classes of chemicals are you most interested in sourcing renewable versions to make your products?

Base: users of chemical products/distributors (211)

Applications in which customers are asking for increased renewable content

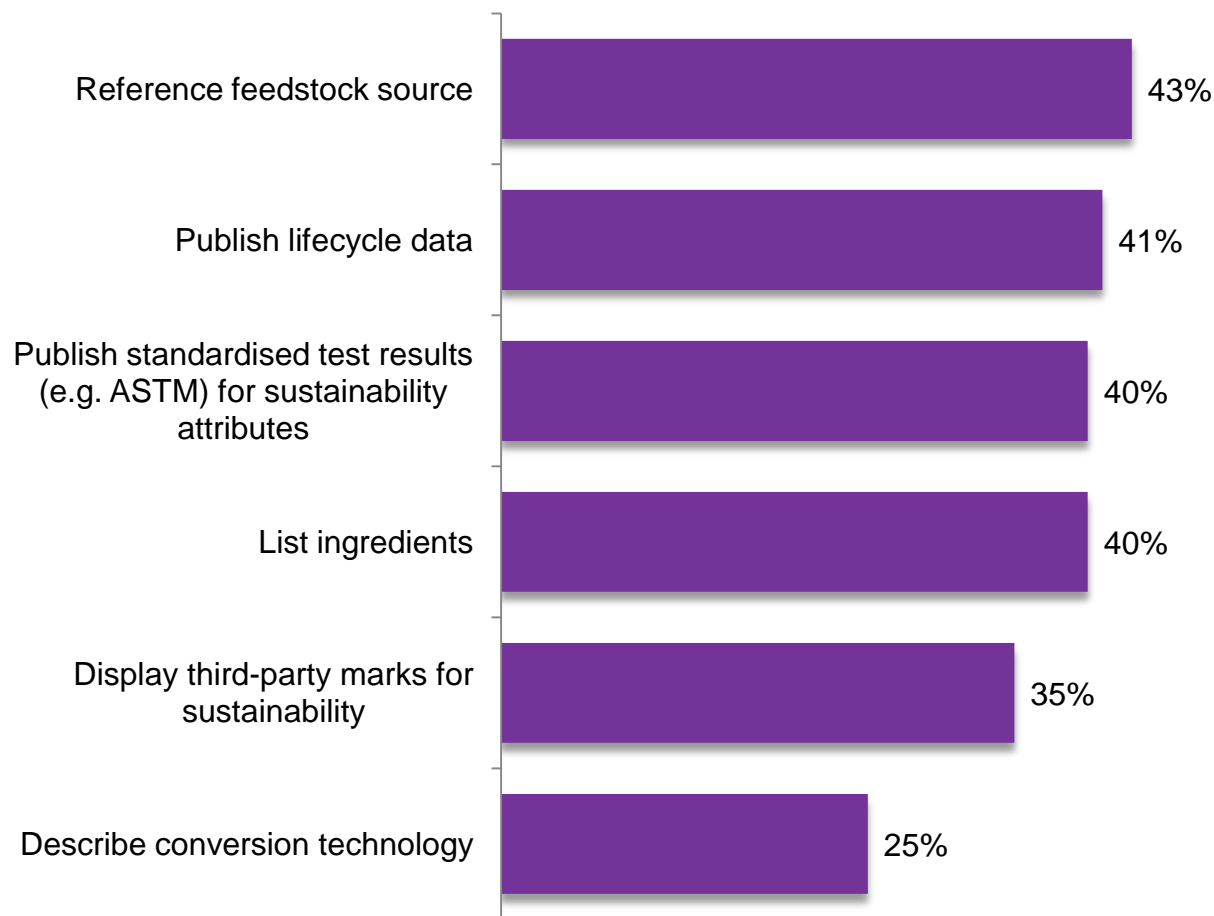


For 23%, their customers have asked for none of the prompted applications.

Q. In which applications are your customers asking for increased renewable content?

Base: excluding 'none' (164)

The most effective strategies for promoting the sustainability benefits of products



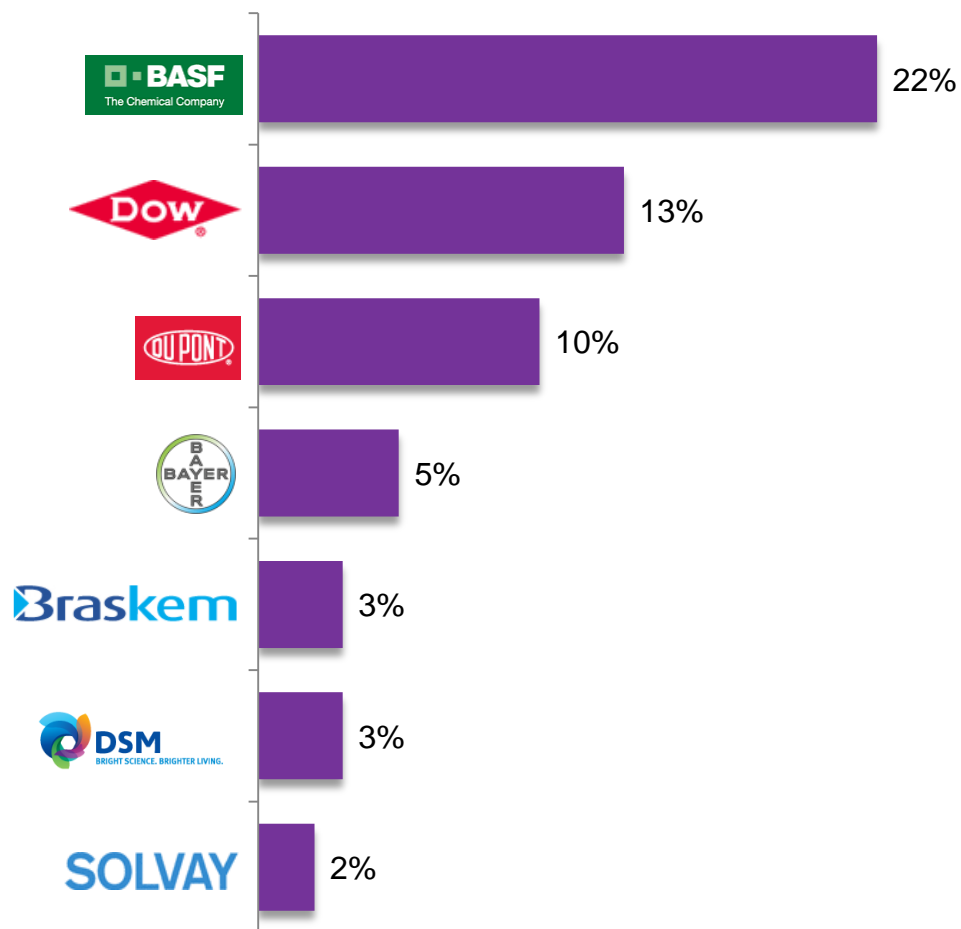
Q. Which of the following do you believe are the most effective strategies for promoting the sustainability benefits of your products?

Base: users of chemical products/distributors (208)

Brand Awareness

Technology developers - first mention

2%+ are shown



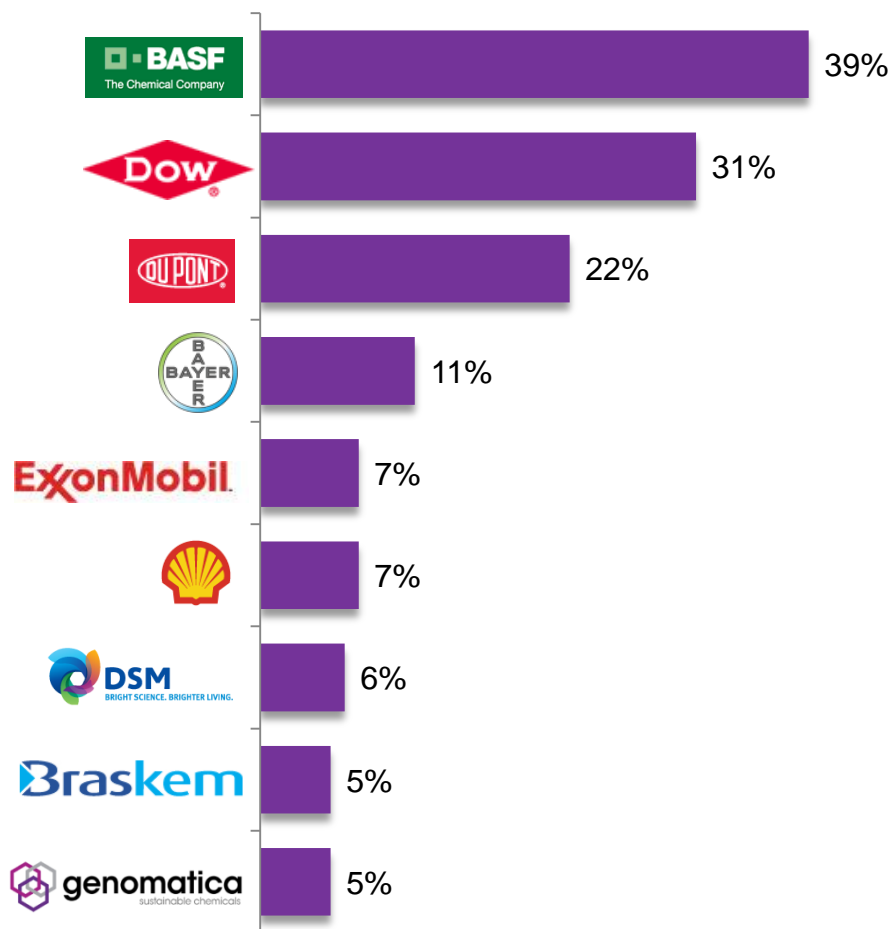
Q. When you think of technology developers for sustainable chemicals, which companies come to mind?

Base: all responding (199)

33

Technology developers - total mentions

5%+ are shown



Genomatica was the only non-major producer to achieve a score of over 5%

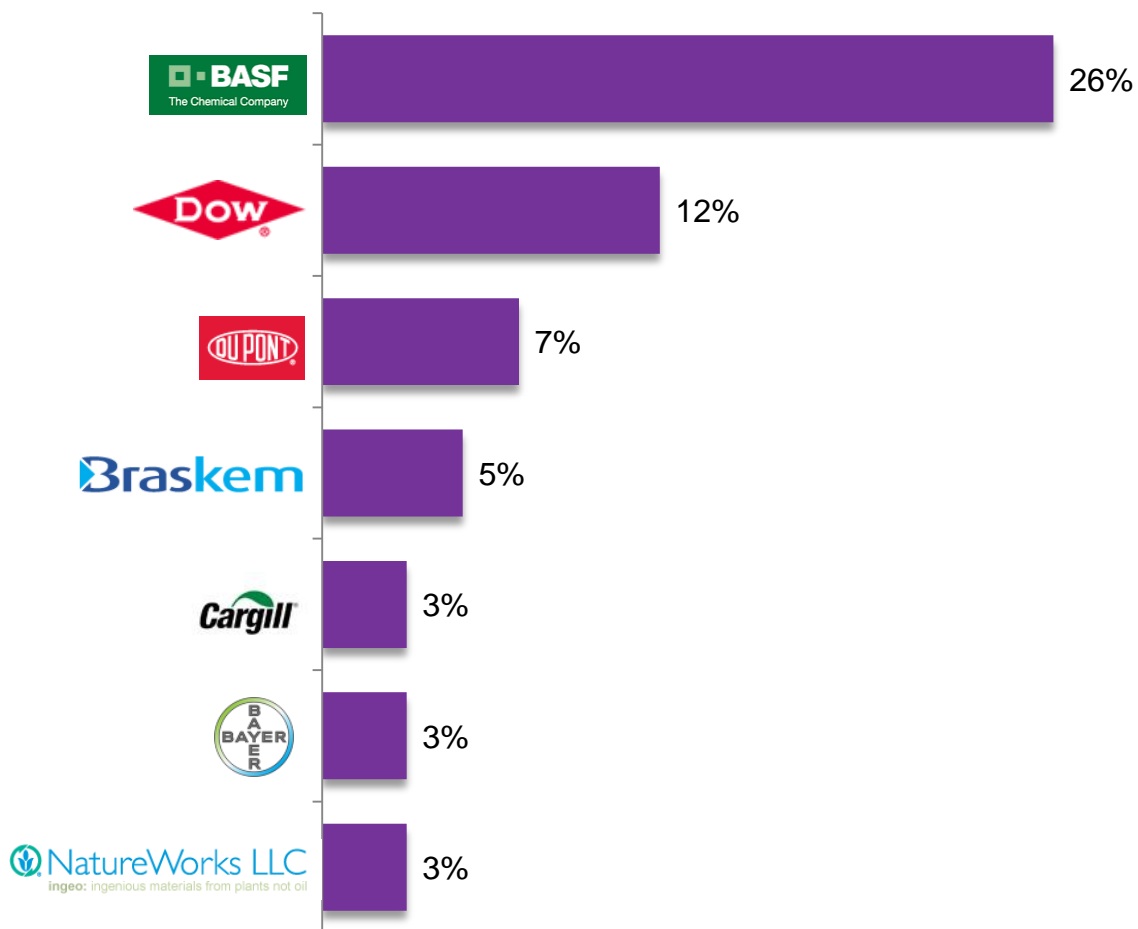
Q. When you think of technology developers for sustainable chemicals, which companies come to mind?

Base: all responding (199)

34

Producers - first mention

2%+ are shown



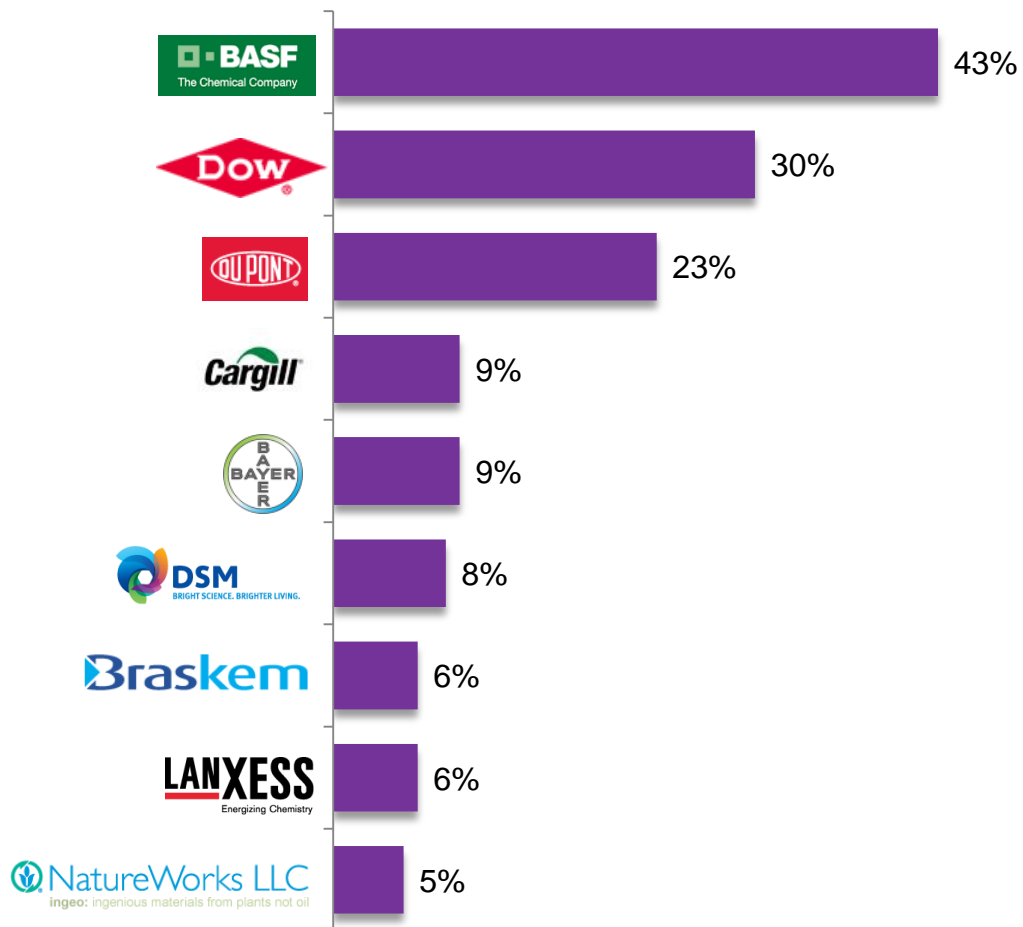
Q. When you think of producers for sustainable chemicals, which companies come to mind?

Base: all responding (204)

35

Producers - total mentions

5%+ are shown



Q. When you think of producers for sustainable chemicals, which companies come to mind?

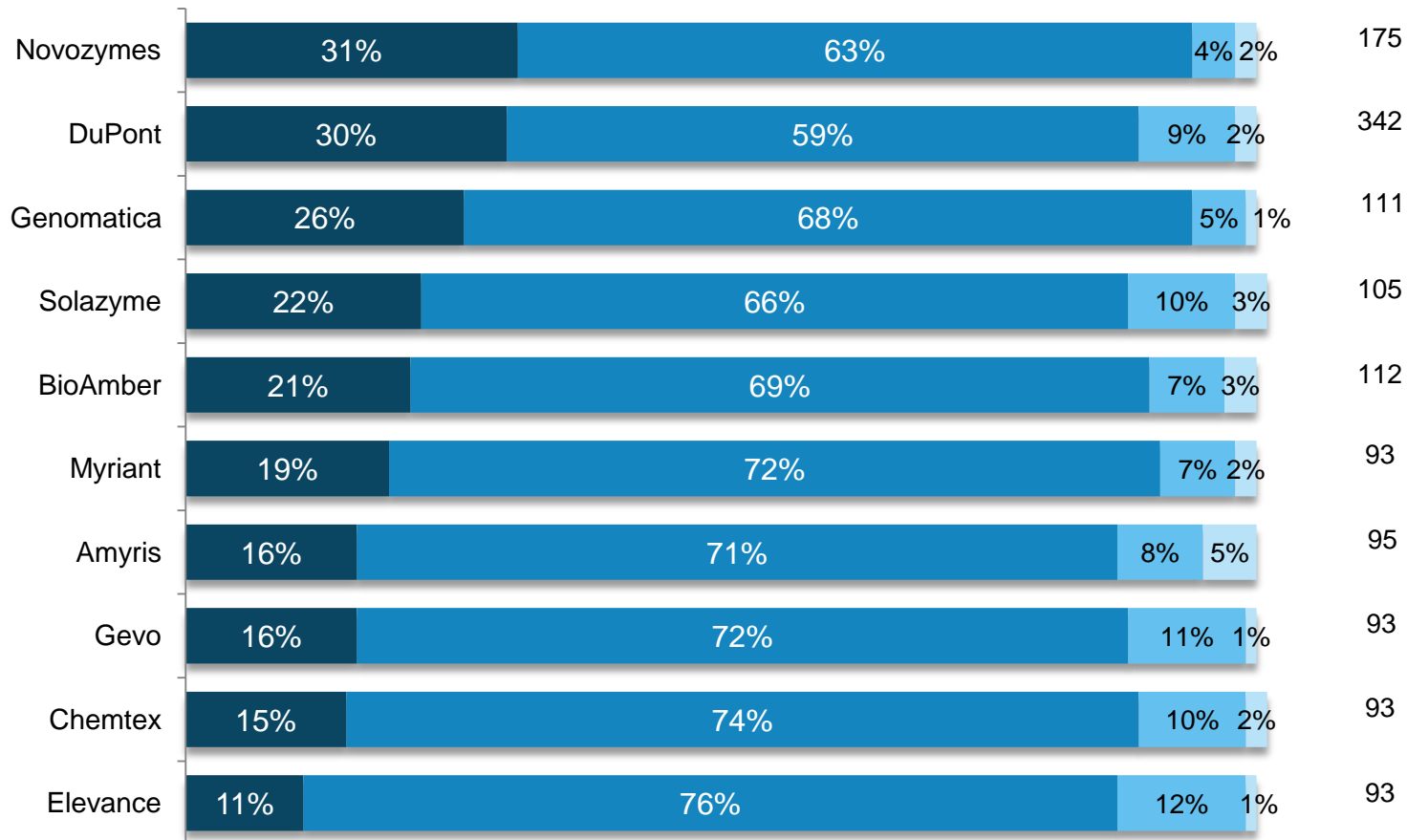
Base: all responding (204)

36

Overall impression of companies with regard to sustainability

■ Very positive ■ Fairly positive ■ Fairly negative ■ Very negative

Base:



Genomatica's "very positive" score is best in its cohort; while "fairly and very negative" are the lowest

Q. What is your overall impression of the following companies with regard to sustainability?

Base: those who are aware / with an opinion (shown)