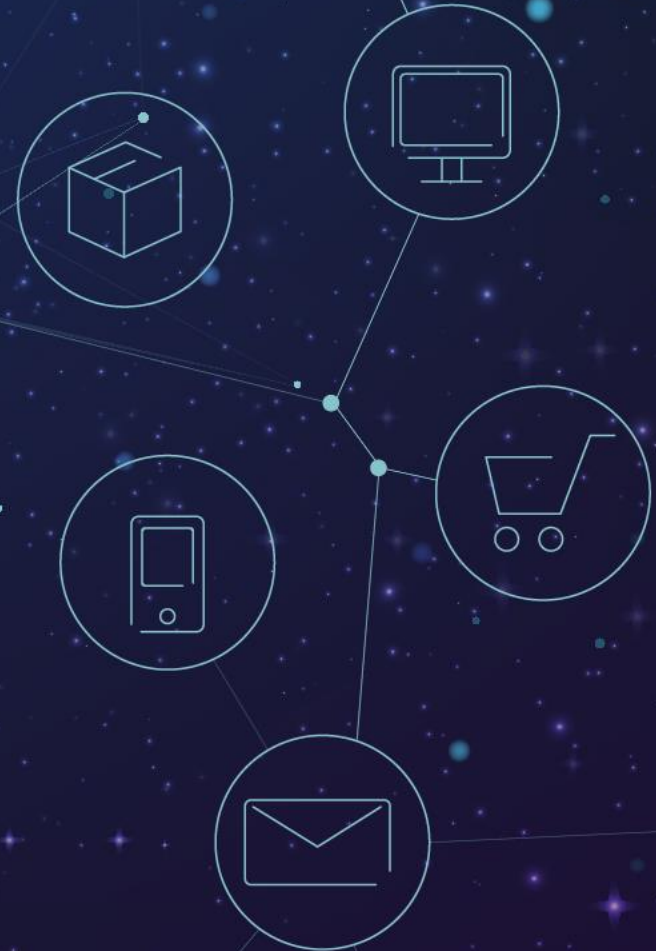
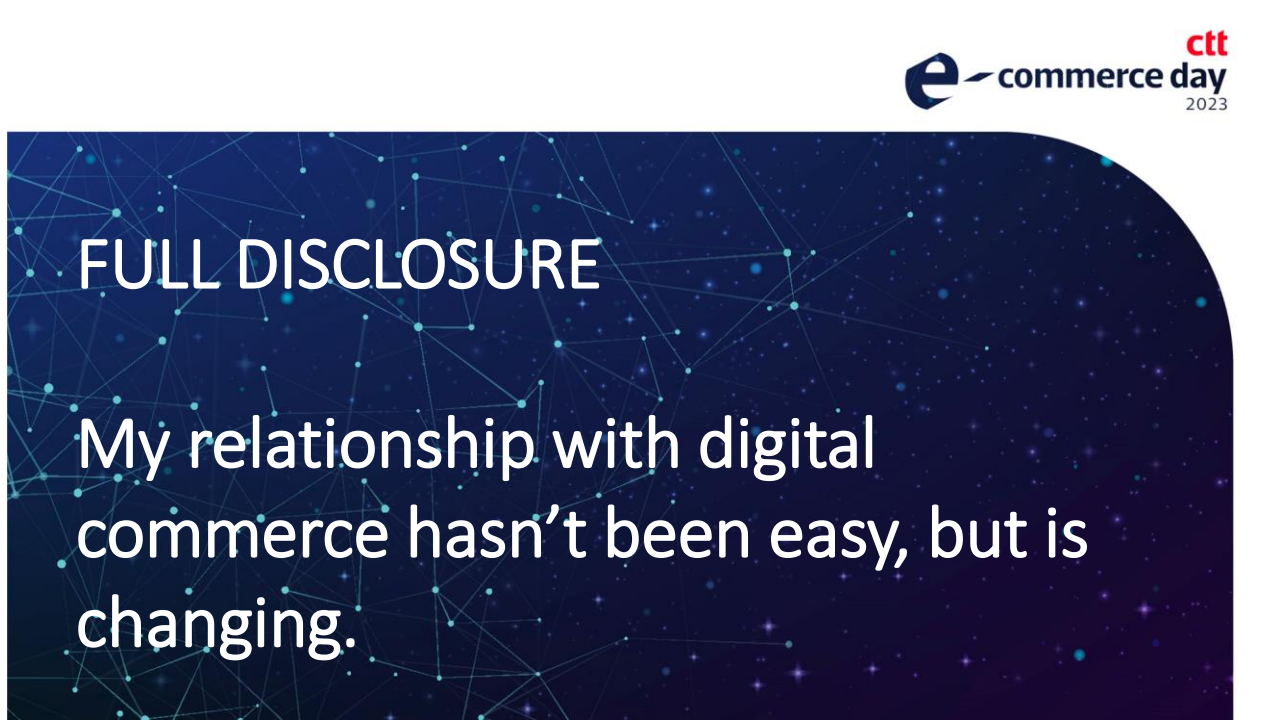
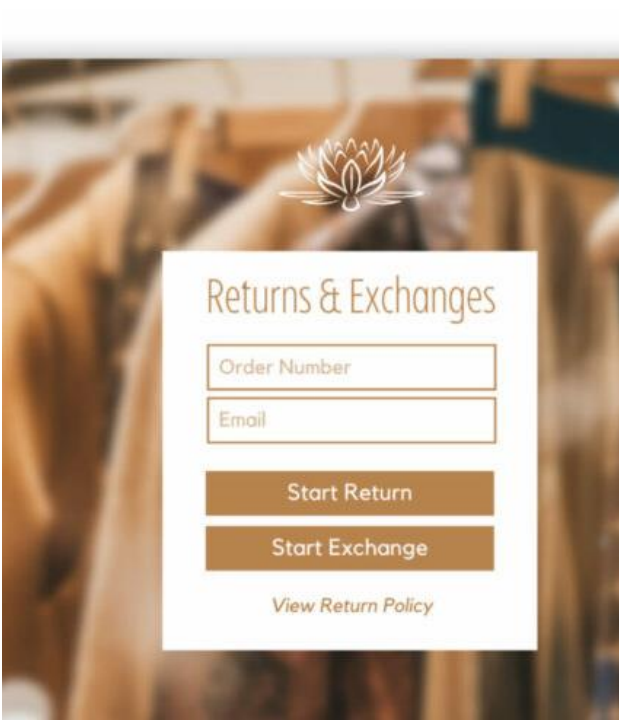
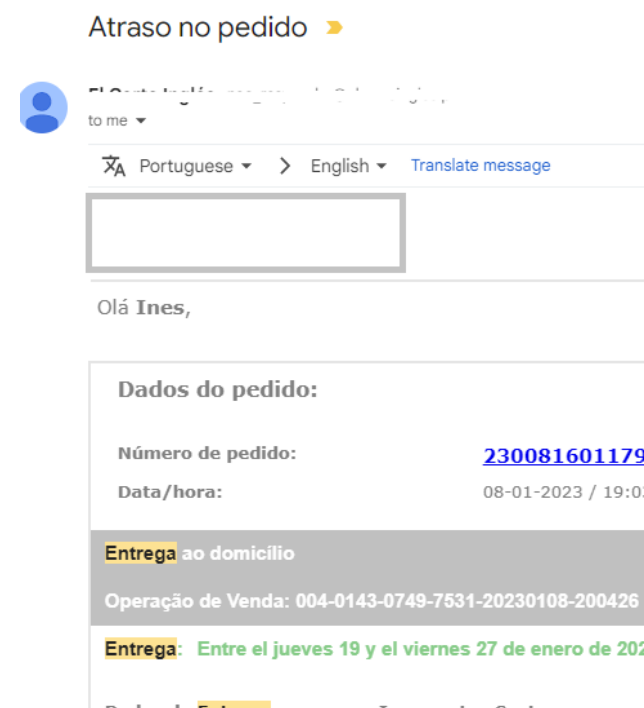
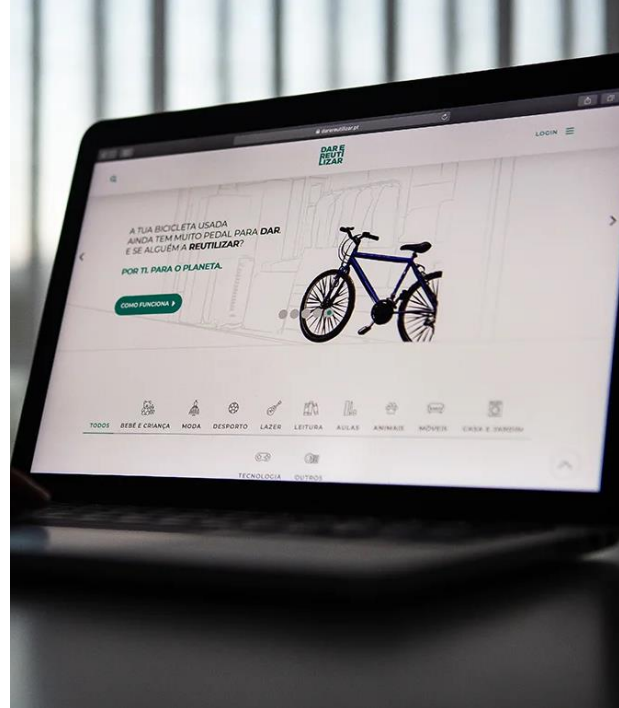




Greener and smarter e-commerce





one
why?

One word: risk



Consumers

Customers value customer-driven organizations objectives and the demand for greener products and services



Regulators- Governments and regulators restrictions and rules relating to how companies have an impact on the environment



Workers

Sustainability issues are increasingly relevant in the company's value proposition to its employees



Investors

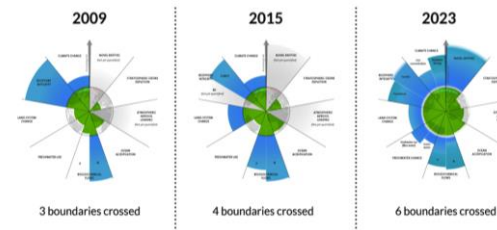
Investors are looking for opportunities to Green investment, with lower long-term risk



Civil society- Society and communities are vigilant and respond to the company's actions with great impact (e.g. social media)

"the economic losses of the past have been more significant in some EU countries and years", and "during the period 1980-2020, [these falls] range from almost 8% of GDP in Spain to 7% of GDP in the Czech Republic and 5% in Romania and Portugal"

Comissão Europeia, 2022



Global Risks Report 2023

Top 10 Risks

"Please estimate the likely impact (severity) of the following risks over a 2-year and 10-year period"

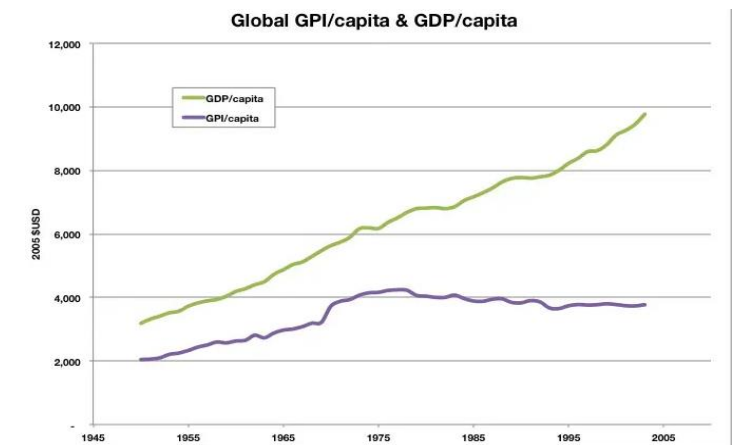
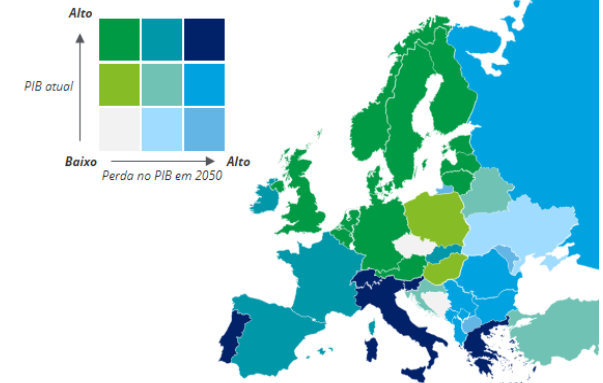
WORLD ECONOMIC FORUM



Risk categories
Economic Environmental Geopolitical Societal Technological

Source: World Economic Forum, Global Risks Perception Survey 2022-2023

Comparação do PIB atual vs o PIB 2050 (no contexto Europeu) num cenário climático de aumento de 3,2° a 5,4°. Atualmente, o Planeta já aqueceu 1,1°C



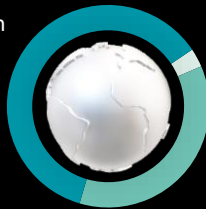
Kubiszewski, I., Costanza, R., Franco, C., Lawn, P., Talberth, J., Jackson, T., & Aylmer, C. (2013). Beyond GDP: Measuring and achieving global genuine progress. Ecological economics, 93, 57-68.

How am I doing?

To what extent do you expect climate change to affect your company's strategy and operations over the next three years?

61%

Very High/high



3%

Little/no

36%

Moderate/some

What actions/adaptations have been made?

- ▶ 59% Energy Efficiency
- ▶ 59% Sustainable materials
- ▶ 54% Clean tech

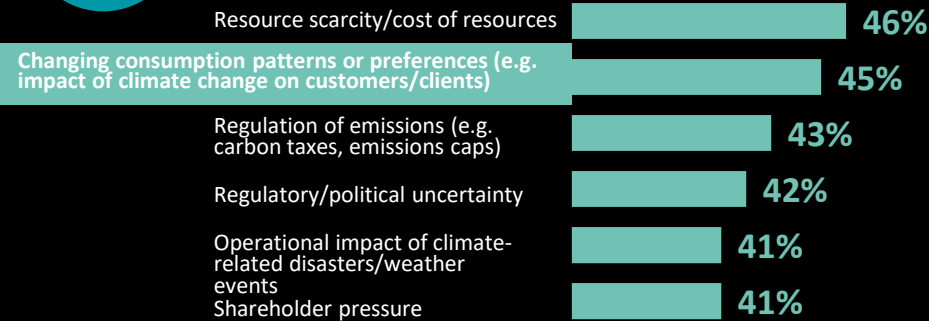
What are the biggest obstacles?

- ▶ 49% Develop new products/services
- ▶ 44% Value Chain/Supplier Buy-in
- ▶ 43% Upgrade/relocate facilities for greater resiliency



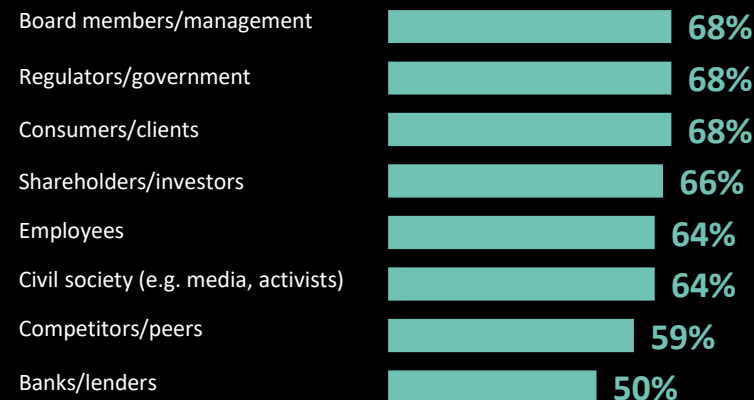
Top Climate Issues That Are Already Affecting Businesses

(Select All That Apply)



To what extent does your company feel pressured by stakeholders to act on climate change?

(Select all that apply, to a large extent)



In your opinion, how seriously do the following groups approach the issue of climate change?



29%

said they believe the private sector is "very" serious



28%

said they believe governments around the world are "very" serious

Also true for e-commerce...

Green consumerism is rising, investors want Sustainability, and the regulatory pipeline is demandin → forcing change into commerce as well – including digital

CONSUMERS

- 65% of online shoppers consider that choosing eco-friendly delivery alternatives when shopping is important
- 73% are willing to change their consumption habits to reduce impact
- 82% of e-shoppers consider brands must be environmentally responsible
- 66 % of millennial consumers are willing to spend more money on sustainable brands/labels and 75% see brands giving back to society is important (not focusing solely on profit)
- 70% are more likely to choose an online shop if it offers more environmentally friendly deliveries
- Packaging and transport more relevant (24% of volume of the package is empty)

INVESTORS

- **54%** global investors consider **sustainability fundamental** to investment processes
- **77%** of fund selectors surveyed consider **S&C analysis a fundamental part of sound investing**

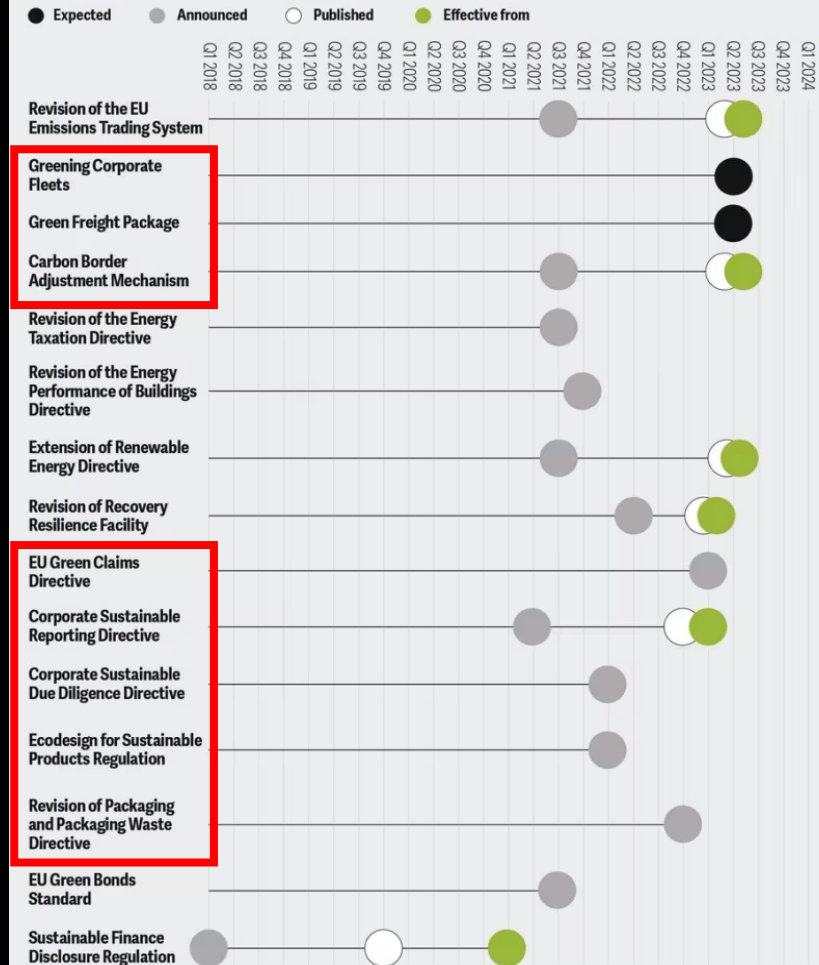
CONTEXT

Country	Environmental Performance Index ₍₂₀₂₀₎
Denmark	1
Spain	14
Greece	25
Portugal	27
Poland	37

REGULATION

Figure 1








Status and timeline of key EU sustainability initiatives



Source: Deloitte analysis, 2023.

And change is a foot

Deloitte partnered with APLOG to understand how the changes are evolving in the digital commerce in Portugal

-  **Descarbonização total ou parcial da frota**, promovendo entregas em bicicleta ou outros veículos não poluentes no centro das cidades.
-  **Promoção de uma alteração na perceção dos consumidores relativamente a entregas em casa**, tornando-as um método de entrega *premium*.
-  **Vulgarização de pontos de recolha** em todo o território nacional, promovendo métodos de entrega *Click & Collect* ou em cacifos, que permitem reduzir as emissões de carbono das entregas em até 90%.
-  **Partilha de relatórios das emissões de carbono com retalhistas**, de modo a criar *engagement* por parte dos operadores de *commerce*.
-  **Aumento da utilização de embalagens reutilizáveis e recicláveis** em detrimento do uso de plásticos.
-  **Melhoria da informação disponibilizada nos *websites* acerca dos impactos ambientais** de cada método de entrega.
-  **Compliance com valores ESG** (*Environmental, Social and Governance*), como o uso de luz natural nos armazéns ou a instalação de painéis solares.

Top 3 tipologias de *websites* com maior volume de compras *online* em 2022⁵

1

GRANDES
MARKETPLACES

2

LOJAS
PRÓPRIAS

3

MARKETPLACES DE
PRODUTOS EM 2ª MÃO



33%

PONTO DE *PICK-UP*



89%

DOS CONSUMIDORES PESQUISAM
CLASSIFICAÇÕES E COMENTÁRIOS ANTES
DE COMPRAR UM PRODUTO²

CONTUDO, APENAS...

31%

dos operadores
disponibilizam
a funcionalidade
de **classificação**

28%

dos operadores
disponibilizam
a funcionalidade
de **comentários**

Os consumidores não têm por vezes conhecimento dos **impactos ambientais** das várias opções de entrega disponibilizadas, destacando-se a necessidade de **consciencialização dos consumidores** relativamente aos tipos de entrega que podem escolher.

two.
How?

The journey

Uplifting Sustainability capability is a journey over time

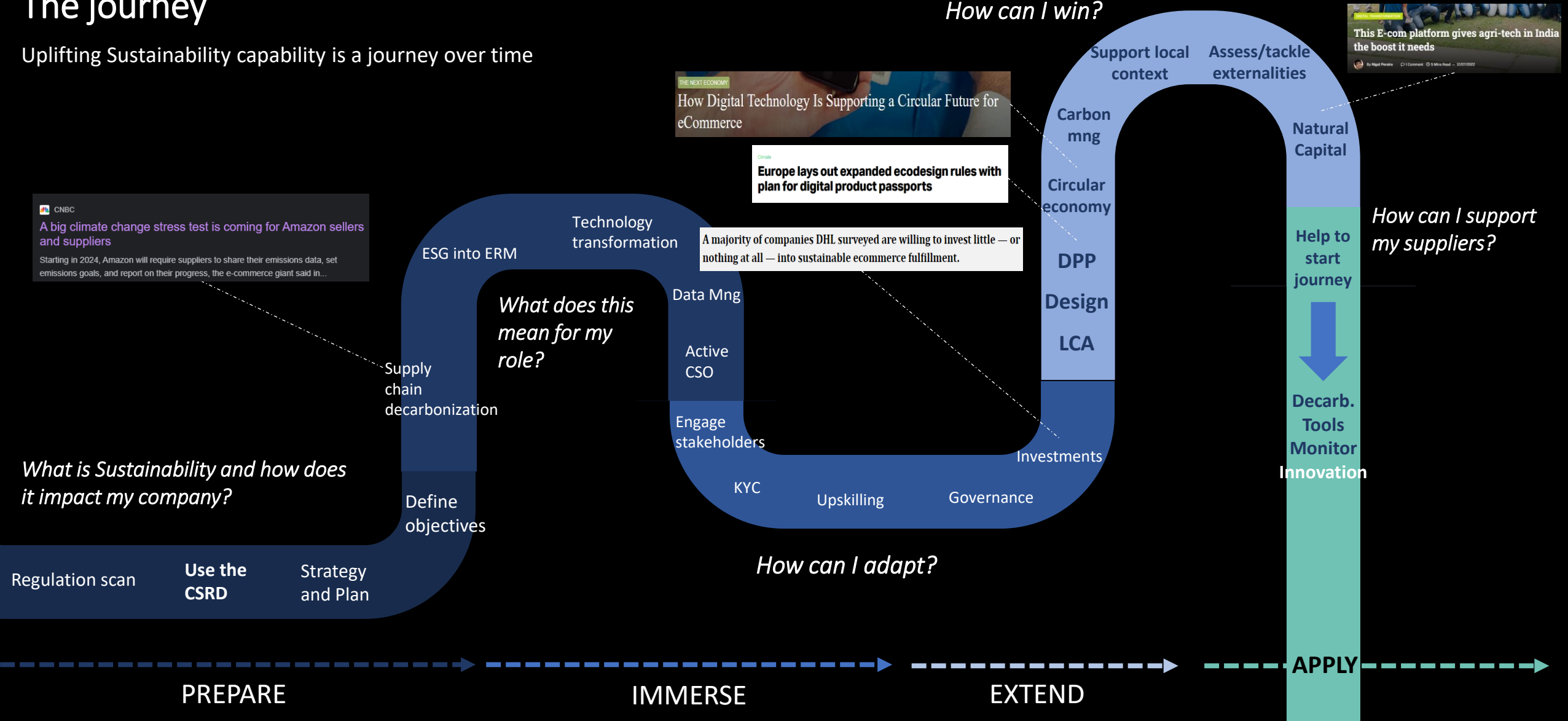
CNBC
A big climate change stress test is coming for Amazon sellers and suppliers
Starting in 2024, Amazon will require suppliers to share their emissions data, set emissions goals, and report on their progress, the e-commerce giant said in...

THE NEXT ECONOMY
How Digital Technology Is Supporting a Circular Future for eCommerce

Climate
Europe lays out expanded ecodesign rules with plan for digital product passports

A majority of companies DHL surveyed are willing to invest little — or nothing at all — into sustainable ecommerce fulfillment.

This E-com platform gives agri-tech in India the boost it needs
By Nigam Pandey | 1 Comment | 5 Min Read | 10/11/2023



Where to focus?

1

Know your context: your value ecosystem and how you can impact it can lead to opportunity (e.g. leverage regulation, DMA, AI)

2

Create a value-based narrative: citizens are more aware and easily call on the bull***. Focus on conscious, achievable targets and recognize faults – looking for partnerships to develop solutions

3

Create a new level of transparency: creating full transparency on costs and investment on the value ecosystem allows for co-investment on solutions (e.g. True Price)

4

Leverage technology for positive impact: incorporating technology for better monitoring of value ecosystem (e.g. improved efficiency, efficacy and sufficiency), and impact on social and environmental context

NEVER FINISHED by IDEO

[Smart Things That Will Save the World | IDEO](#)



Packaging is over-engineered for online delivery: CLEAN is a new food packaging system designed for online delivery



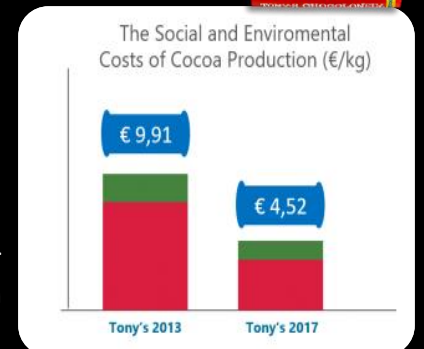
Infinity is a makeup service with packaging designed to improve with age, with a built in scanner that captures skin health data and insures refills

TRUE PRICE & Tony's

[Home - True Price](#)

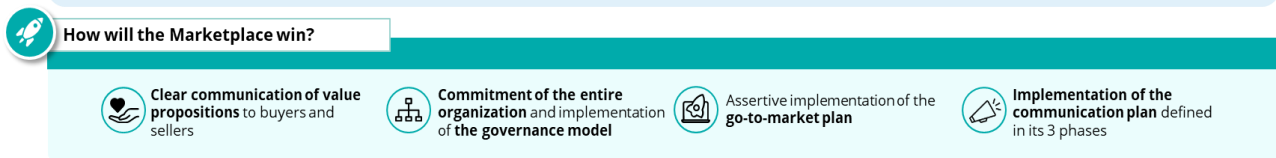
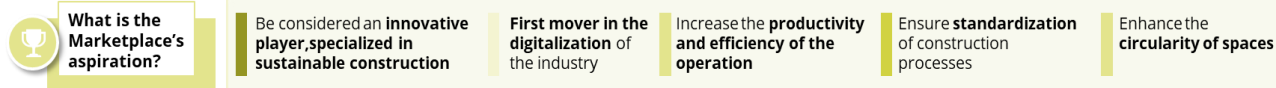
2023 – from website

- We sourced 14,002 metric tons of 100% traceable cocoa beans.
- 14,763 cocoa farmers were positively impacted in 2022 (up ~6000 farmers)
- Invested €8,233,158 – 6.2% of Tony's total revenue – into impact initiatives.
- Child labor in co-ops ongoing (4,4% in co-ops vs 53% industry average)

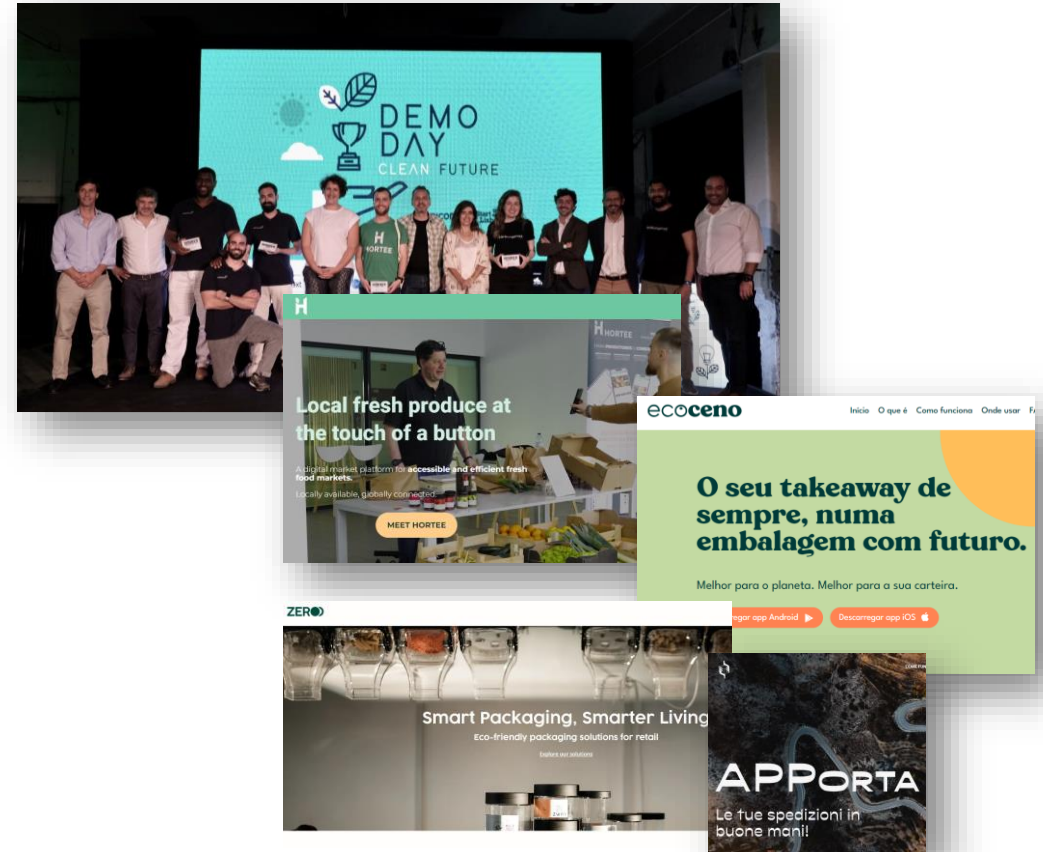


From Deloitte's vault...

Activating solutions for e-commerce sustainability



- 1** CHARACTERIZATION OF THE CONSTRUCTION MARKET IN PORTUGAL
- 2** DEFINITION OF THE OFFER (PRODUCTS AND SERVICES) TO BE INCORPORATED INTO THE MARKETPLACE
- 3** MAPPING THE COMPETITION AND THE MARKET ECOSYSTEM
- 4** DEFINING A STRATEGY AND IMPLEMENTATION PLAN FOR THE MARKETPLACE



From Deloitte's drawing board...

Activating solutions for e-commerce sustainability

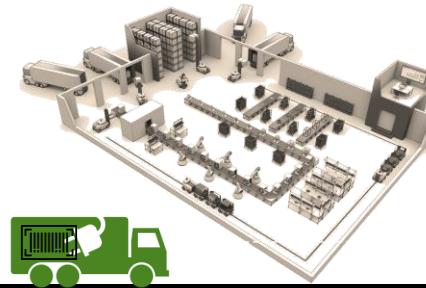
Material management



Factory



Control



Anomaly
Detection



Certification
Management



Control
Information



Bar Code
Management



Non-conformities
notifications



User
Management



Creating barcodes using a traceability solution to establish the material's origin & characteristics

Linking the barcodes with the wood's **transportation process**

Delivering material batches to the buyer

Reception of the material by the buyer

Barcode scanning for material acceptance

Submission of the reception manifest, linked to the **barcode containing buyer identification**

Cross-checking and validations performed by the system

Validating industry certificates to ensure authenticity

Controlling the barcodes to **prevent fraud**

Alerts and **Notifications** based on **Industry Regulations**

Solution Usage **Metrics**

Do it for your Mother (thank you!)



NEWS

Data shows online retailers with the highest carbon footprints

Gretchen Salois | Jul 25, 2023



Websites emit carbon dioxide emissions (CO2). Recent data shows which retailers top the list of offenders versus those who don't.

Key takeaways:

- Phone case brand Casetify produces the highest grams of carbon emissions per visitor to its website, according to KnownHost.
- Williams Sonoma produced the least CO2 per website visit.



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