Prior to 2008 it was sufficient to assume that analogues of “conventional” food and beverage products would sell if they were organic. Consumers ranging from the Core to the Periphery of the World of Organics have different beliefs and interests when it comes to integrating organics into their lifestyles—and these beliefs shift and evolve over time. Marketers focusing on organics will also have to understand that new organic product successes are still waiting to be developed but these opportunities require an understanding of which types of consumers such products resonate with.

**Organic & Natural 2014** updates the attitudes, behaviors and understanding that motivate (or inhibit) current consumer interest in and purchase of organic and natural products. Looking through a cultural lens, we explore the drivers for future demand in organic and natural and provide specific understandings of those organic categories that consumers find most relevant.

As consumer understanding of organic and natural evolves, people gain more awareness of and knowledge about these topics than ever. Dialogue about organic was once rooted in sustainability (e.g., good for the environment, environmental consciousness) but now encompasses making “healthier” choices, and messaging around healthy (better for me and the environment) and locally sourced (better for my community) resonates for Americans increasingly fixated on health and well-being. The report provides visionary food for thought (recommendations) for consumer packaged goods food and beverage companies, food retailers and food service operators.

These shifts in mindset, awareness and access have propelled organic and natural products into the mainstream, and they now extend across virtually all retail and food service channels.

**Organic & Natural 2014** provides marketers the essential understanding with which to engage a dynamic and evolving consumer in a new light. The report provides strategic and tactical insights into the hierarchy of product attributes and how they ladder up to ownable brand distinctions. There is a section of the report devoted specifically to the issue of GMOs.

**Methodology**

Integrated quantitative online and qualitative ethnography survey. Quantitative online survey: Nationally representative sample of 1,728 U.S. adult primary shoppers (aged 18-69), including 544 parents of children 8 years and younger. Survey fielded June 2014. Qualitative In-depth in-home, focus group and panel interviews were held in Denver, Nashville and Seattle.

Questions? Contact: Blaine Becker by email at: blaine@hartman-group.com or by phone: 425.452.0818, ext. 124

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EXECUTIVE SUMMARY (excerpt)

The Hartman Group’s Organic and Natural 2014 is the latest in its longest-running series of consumer-centric syndicate research exploring the organic and natural trend in America. In the nearly two decades that we’ve been tracking the organic marketplace and immersing ourselves in the worlds of organic consumers, we have seen their approaches to and understandings of organic and natural products grow and evolve.

With this year’s update, we find greater knowledge about and engagement with organics across all consumer segments. This ongoing evolution is driven by broader cultural trends and narratives, including expanding food literacy, the mainstreaming of a culture of health and wellness in which food plays a central role, heightened environmental consciousness and growing skepticism about the integrity of big business and institutions. If there’s one word that captures the swelling chorus of consumer demands in 2014’s organic marketplace, it’s transparency.

What’s in it? How was it made? Who made it? What’s the story behind it?

Whether through deep engagement with food culture and the worlds of health and wellness, or by virtue of passing encounters with free-flowing information streaming from ever-multiplying channels, today’s consumers are increasingly aware of the personal, social, environmental and health consequences of the foods they consume. While the increased availability and proliferation of organic and natural products across categories fuel consumers’ aspirations, in a climate awash in confusing and conflicting information, consumers are questioning products, companies and certifications more than ever before. And more and more, they are expecting companies to respond.

Key observations

- Organic usage is staying steady at about three-quarters of US consumers.
- Organic’s and natural’s halos of health and authenticity have lost some of their luster.
- This is not to say that organic does not retain many of it connections to personal health and environmental stewardship.
- “Local” is emerging as a category poised to surpass both organic and natural as a symbol of transparency and trust.
- While price has declined as a significant barrier to the increased use of organics, it remains a hurdle for those categories in which consumers see it as most important.
- Retailers are well-positioned to gain and strengthen consumer trust and loyalty in the organic marketplace.
- While organic in food service remains a relatively low priority, changes in the market are driving consumer interest.
- Genetically modified organisms (GMOs) have become a potent symbol of the ills of the American food system.

“I want to entice my family to eat better, and the best way to do that is to lead by example.”

–Inner Mid-Level consumer, Seattle

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A LOOK INSIDE: SAMPLE PAGES

The Organic Consumer

Organic usage is holding steady, with more consumers using organics at least monthly

Organic and Natural are part of a broader consumer trend toward fresher, less processed foods

The pursuit of real, fresh, less processed foods is now a cultural norm for all consumers.

Today, consumers see eating well as their fundamental health + wellness priority and as a central component of a high quality of life.

Eating well supports all the other behaviors they believe underlie their day-to-day and long-term well-being.

'Good food' is no longer first and foremost about fewer carbs, lower fat, or counting calories; it's about fresh, less processed foods.

While all segments are driven by personal benefit, differing values inform their purchase criteria

In the context of health narratives, avoiding the negative attributes of conventional foods becomes the most salient reason for using organic

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