



Why Organics Are on the Minds of Consumers

April 8, 2019

Roxi Beck

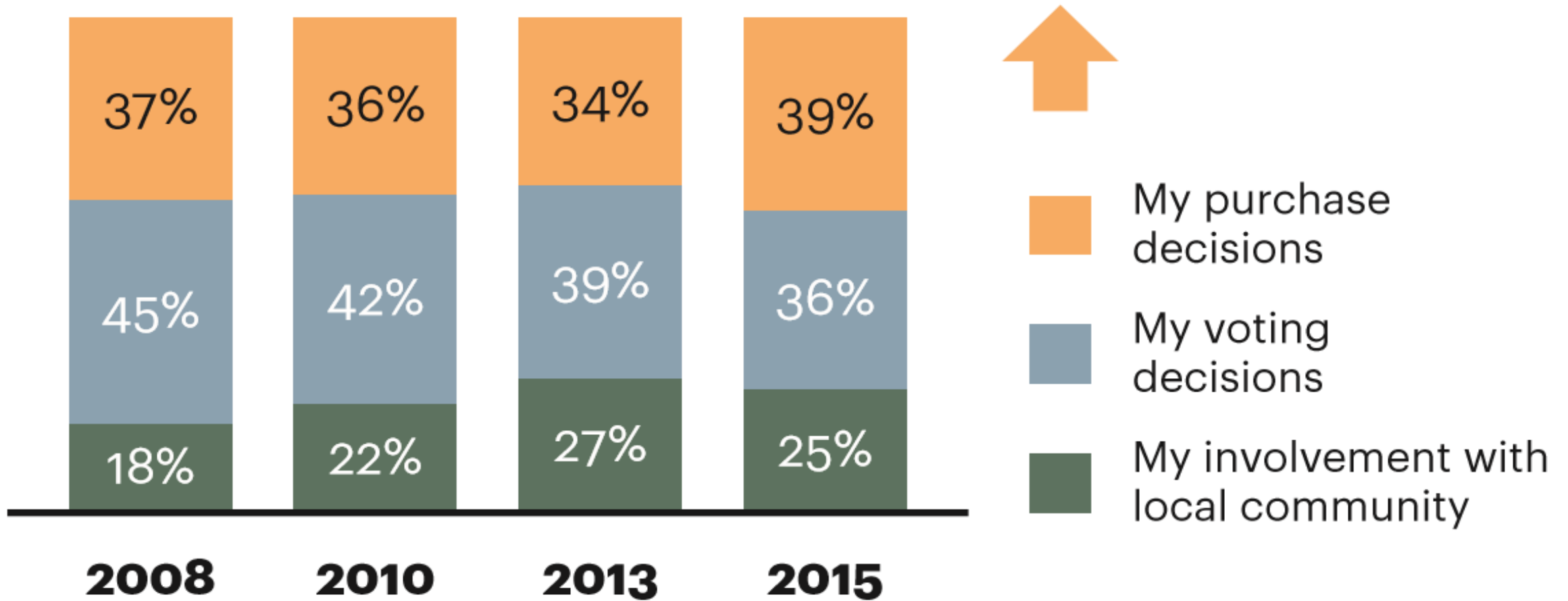
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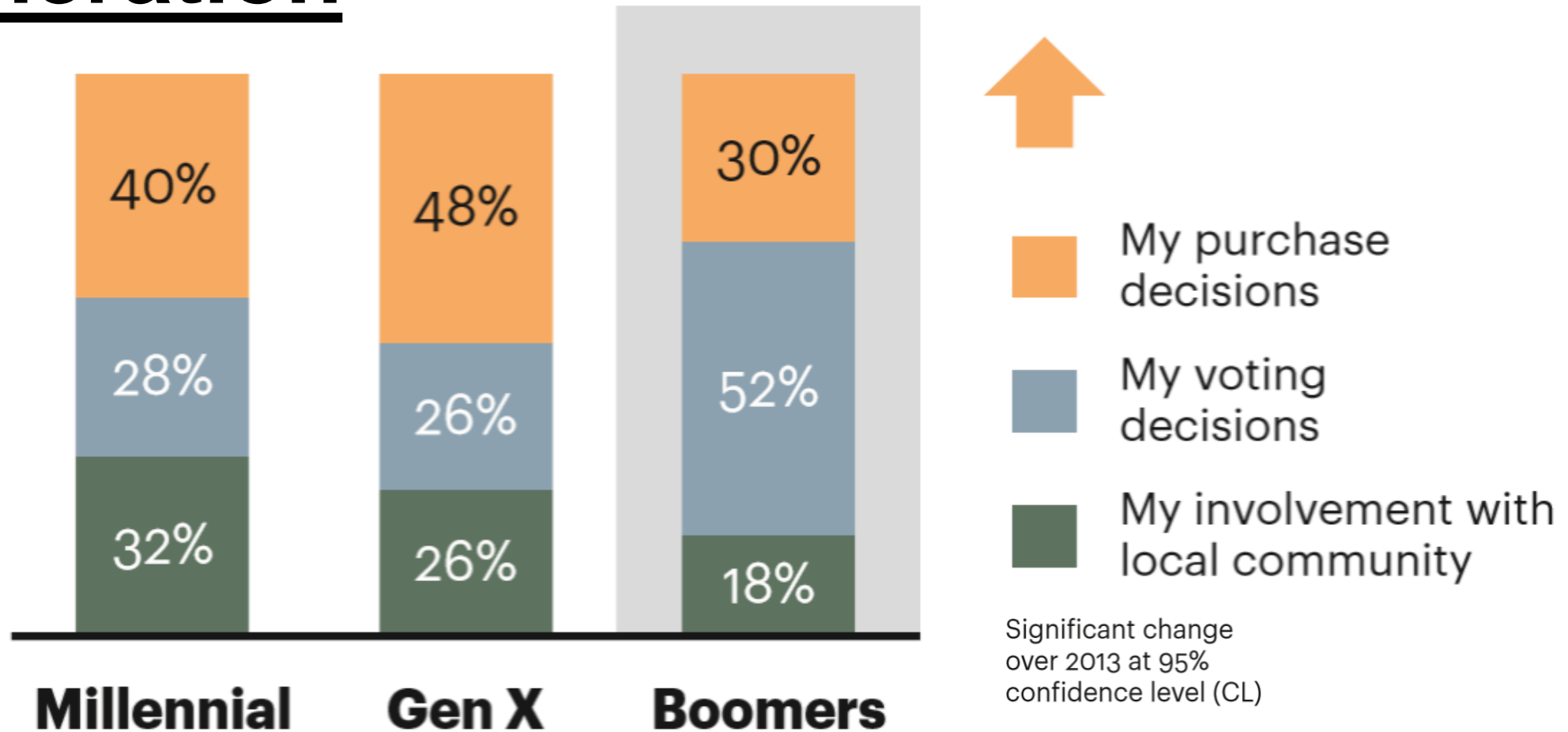
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Greatest Impact on Society



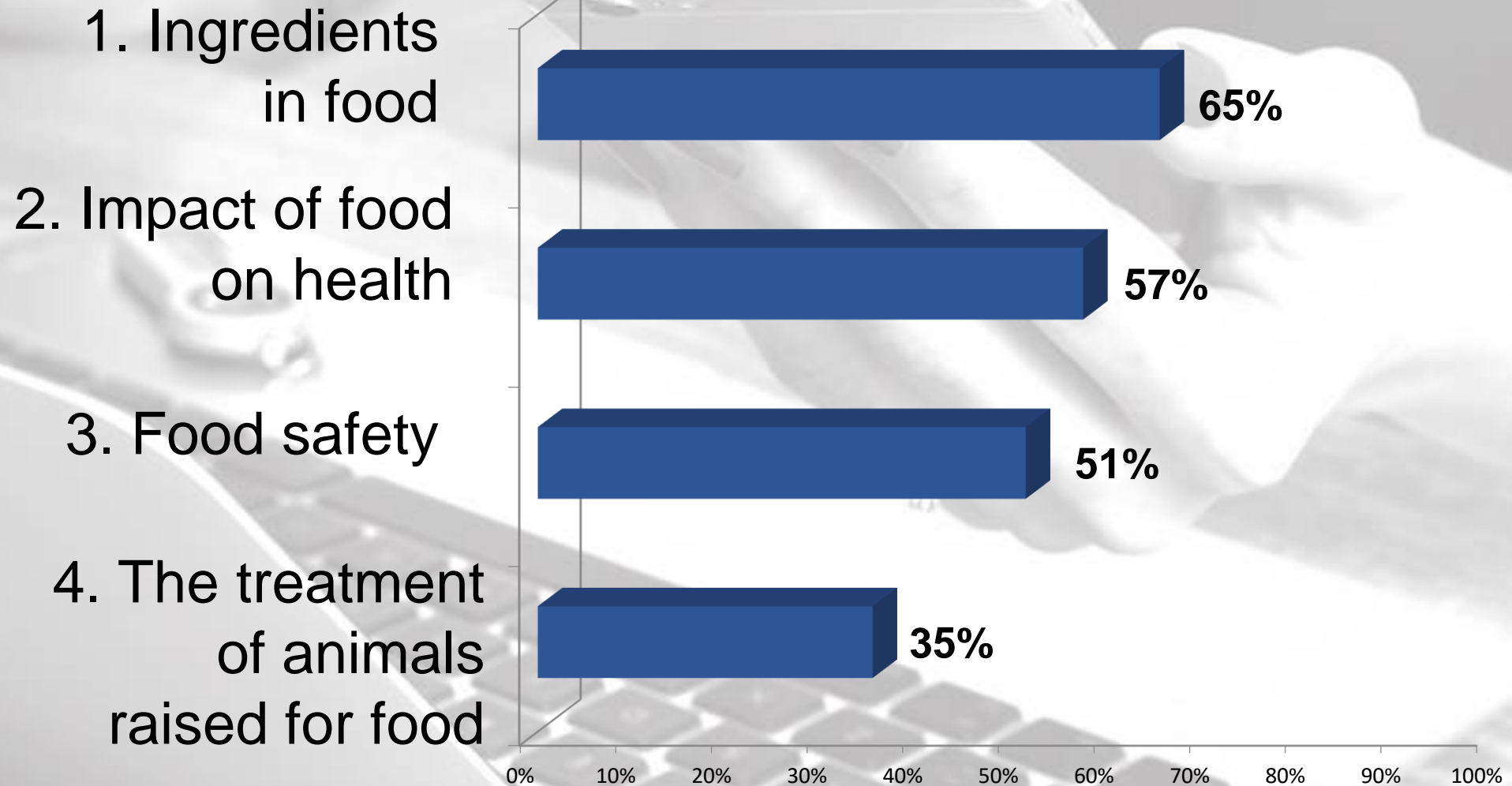
Source: A.T. Kearney analysis

Greatest Impact on Society by Generation






Source: A.T. Kearney analysis

Most Searched Topics Online



Trends for Awareness

Trend	Trend description		2015 size (billion)	CAGR	Threat
Local	Local foods are seeing market growth, strong consumer preference, and increased investment	↔	\$11.7 (US 2014)	9% ⁵	
Transparency	Consumers are demanding increased transparency into food production for safety, ethical, and religious reasons	↔	N/A	N/A	
Discovery	Seeking new food experiences, consumers show increased demand for global ingredients and foods	↔	N/A	N/A	

Projected Growth Rate Next Five Years

Source: A.T. Kearney analysis



FACTORS IMPORTANT IN PURCHASING FOOD






Top Factors Include Taste of Food and Price

- Taste of the Food (21.06 points)
- **Price (20.95)**
- **The Impact of Food on Health (15.33 points)**
- Food Safety (14.64 points)

Foodies differ

- **Impact of food on health (17.56)**
- Food safety (17.03)
- **Taste (15.07)**
- **Price (14.44)**

Key Trends to Watch

Trend	Trend description	2015 size (billion)	CAGR	Threat
Functional	Free-from	There is high growth in free-from market segments		
Private label				
Free-from	\$61.8 (Sum of US non-GMO, organic, gluten-free)	~21%³		
Fresh				

Projected Growth Rate Next Five Years

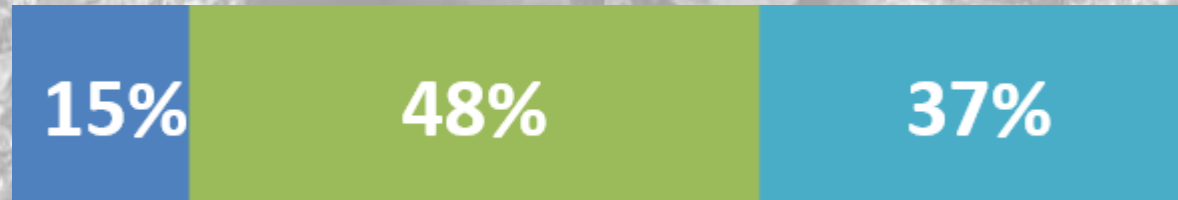
Source: A.T. Kearney analysis

Organics



“Food grown organically is more healthful than conventionally grown food.”

37% Strongly Agree



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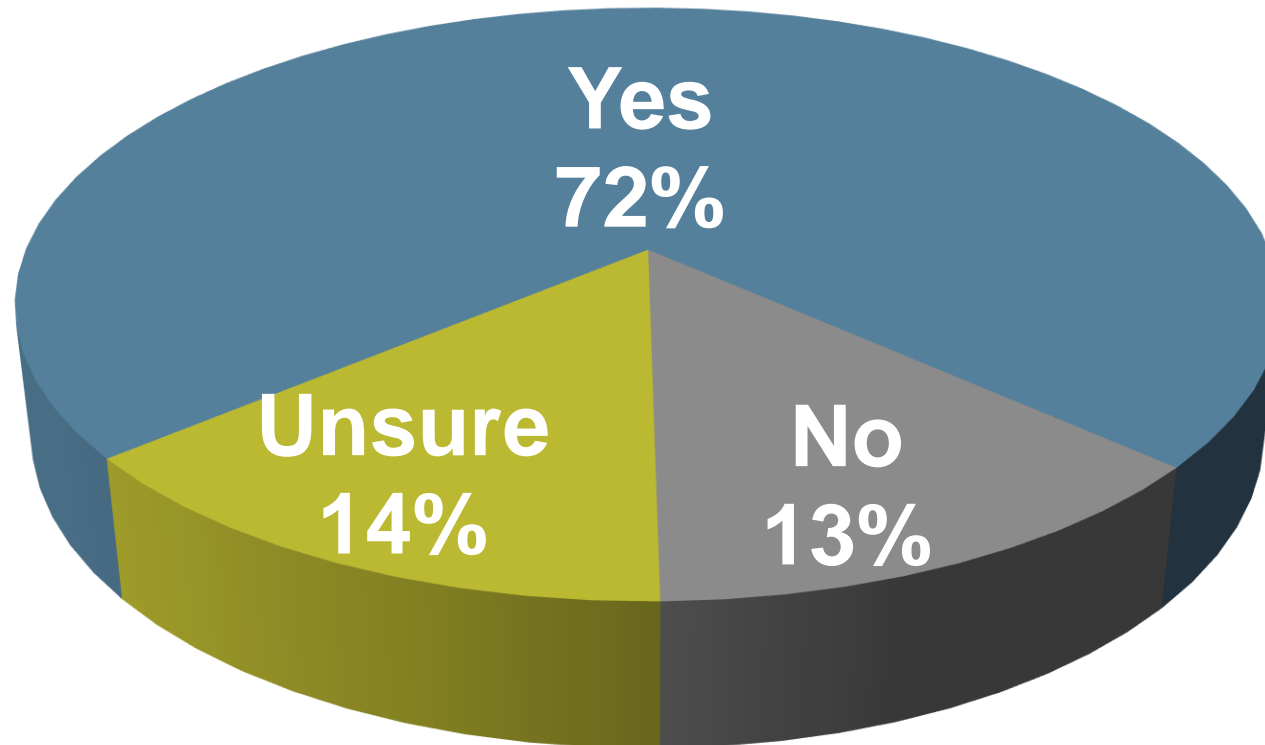
Health is Broadly Defined



A composite image featuring a woman on the left and a man on the right. The woman has long dark hair and is looking off to the side with a worried expression, her hand near her mouth. The man is wearing a suit and tie, with his hand on his forehead and a shocked expression, his mouth wide open. A semi-transparent grey box with rounded corners is centered over the image, containing white text.

Opting Out of
What They FEAR
Or Don't
Understand.

Do You Want Genetically Modified (GMO) Foods to be Labeled?



But Why?



72% Want GMO Foods Labeled

- I believe it is my right to know (77%)
- I support transparency in labeling (60%)
- I want to avoid them because I don't believe they are safe (31%)
- I am just curious to know which foods contain GMOs (28%)
- I don't know whether they are safe (21%)



13% Do Not Want GMO Foods Labeled

- I believe it will cause consumer confusion (63%)
- I believe GMO foods are the same as non-GMO foods (39%)



14% Unsure GMO Foods Should be Labeled

- I am not familiar with GMO (40%)
- There's not enough information available (27%)
- I just don't care about the issue (19%)



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Discussion

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