

# CHANGING CONSUMER EXPECTATIONS



HEALTHY



ORGANIC



FAIR

Volkert Engelsman  
Sofia, September 2009

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*where ecology meets economy*

# Consumer response time

**1948 SENSATION**

**NEW JUST OUT**

**BLACK FLAG SUPER INSECT SPRAY**

**THE MOST EFFECTIVE INSECTICIDE EVER DEVELOPED FOR GENERAL HOME USE**

**Now you get 5 INSECTICIDES IN ONE**

**FAST KNOCKDOWN**

**QUICK KILL**

**and LASTING EFFECT in one super spray**

**NEW** 5 INSECTICIDES—combined in one super spray—D.D.T., Chlorobenzene, Pyrethrum and Organophosphorus

**NEW** KILLS 48 common household insects such as flies, mosquitoes, gnats, house flies, ants, cockroaches, beetles, crickets, and more

**NEW** SUPER EFFECTIVE in a single quick spray, works in 10 minutes to kill insects that crawl or fly in around the home. Chlorobenzene and D.D.T. provide the longer lasting residual effect.

**EXTRA BLOOD-BORING**—The new "super" insecticide spray that's more active against flies, gnats, D.D.T. on wall crawling insects. For extra blood-boring action, Black Flag Super Insect Spray is SAFE to use around the home, wherever you like the same protection used with any outdoor insect spray.

**NEW SPECIAL SPRAY FOR BEDBUGS**

**BLACK FLAG SUPER INSECT SPRAY** is a registered trademark of the E. I. du Pont de Nemours & Co., Inc., Delaware, U.S.A. © 1948 E. I. du Pont de Nemours & Co., Inc.

**AT ALL STORES NOW - BUY A CAN TODAY - Only 49¢ Plus!**

© 1948 E. I. du Pont de Nemours & Co., Inc.

# Historical key consumer interests

Food quality

Chem free

**Organic Products**

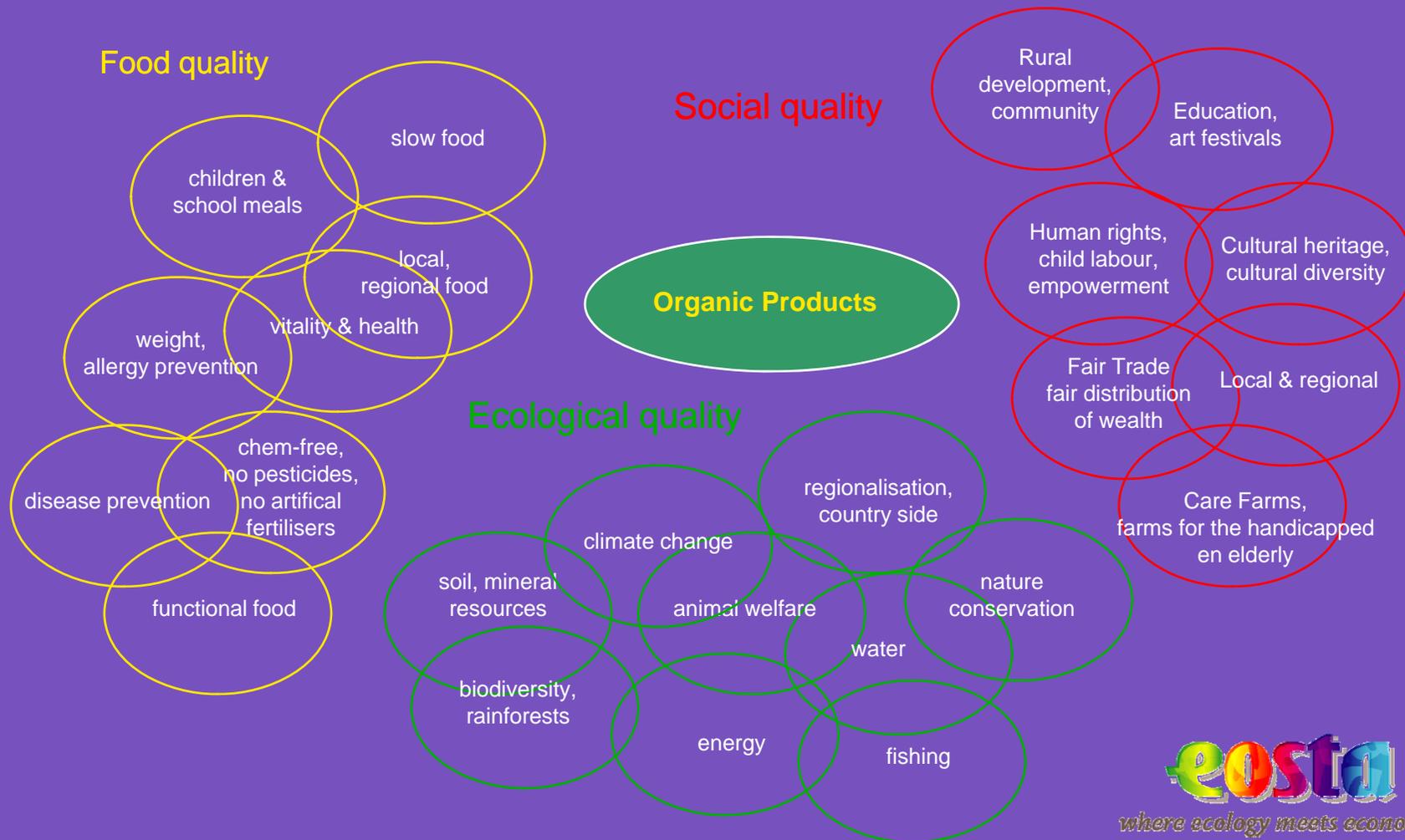
Social quality

Fair Trade

Ecological quality

No pollution

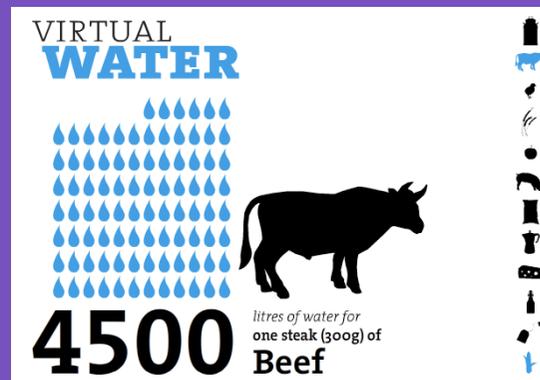
# New key consumer interests



# Changing consumer expectations



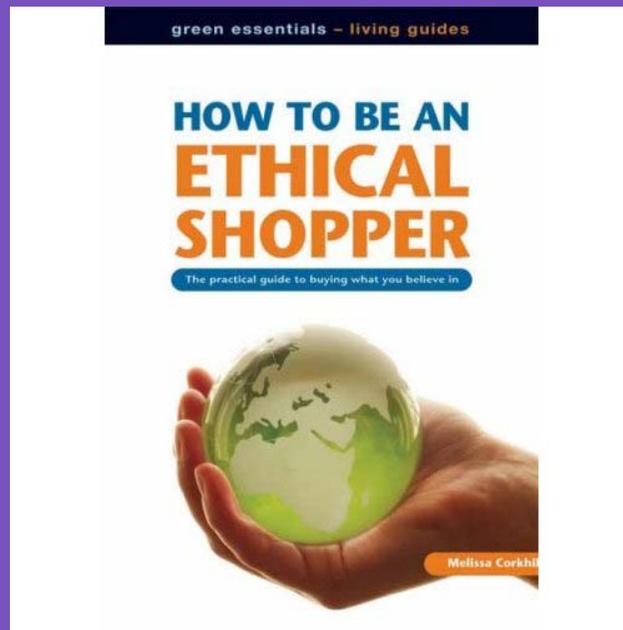
# Changing consumer expectations



# Changing consumer expectations



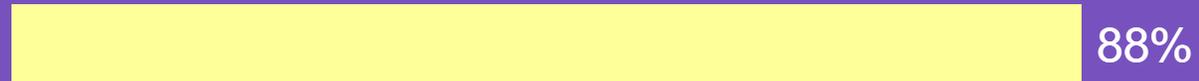
# Changing consumer expectations



Sustainability Wikipedia,  
a matter of time

# Resilience to recession

Sustainability is even more important in the current economic climate



Sustainability issues have been put on hold due to the current economic climate



Sustainability is out of fashion



Source: IGD Poll, April 2009

# 'Eco-Nomics'



## Al Gore

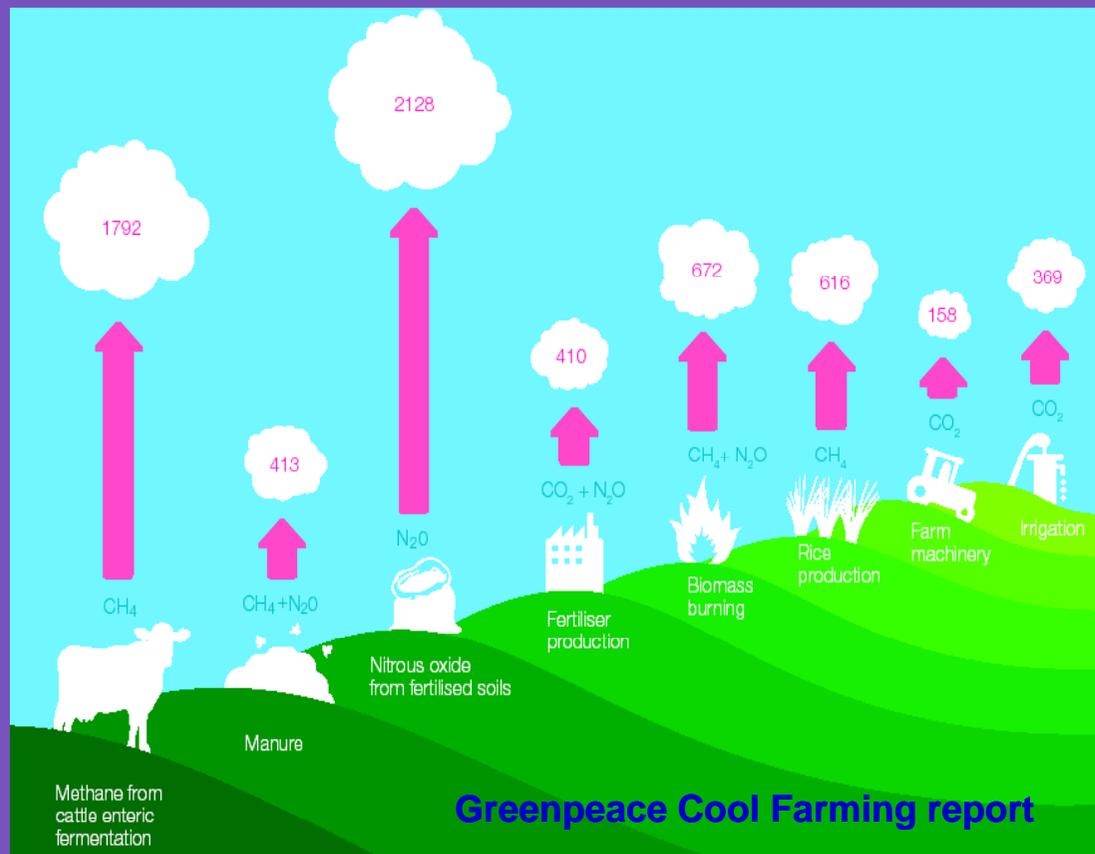
“... the financial crisis and the environmental crisis originate in the same thinking mistake: *exploit today at the expense of tomorrow...*”

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# Climate Change

Agriculture with 30% second largest contributor to Green House Gas Emissions



Greenpeace Cool Farming report

External costs of mineral fertiliser not accounted for in costprice:

- Climate change
- Soil degradation
- Water holding capacity of the soil
- Loss of biodiversity
- Decreasing pest & disease resistance

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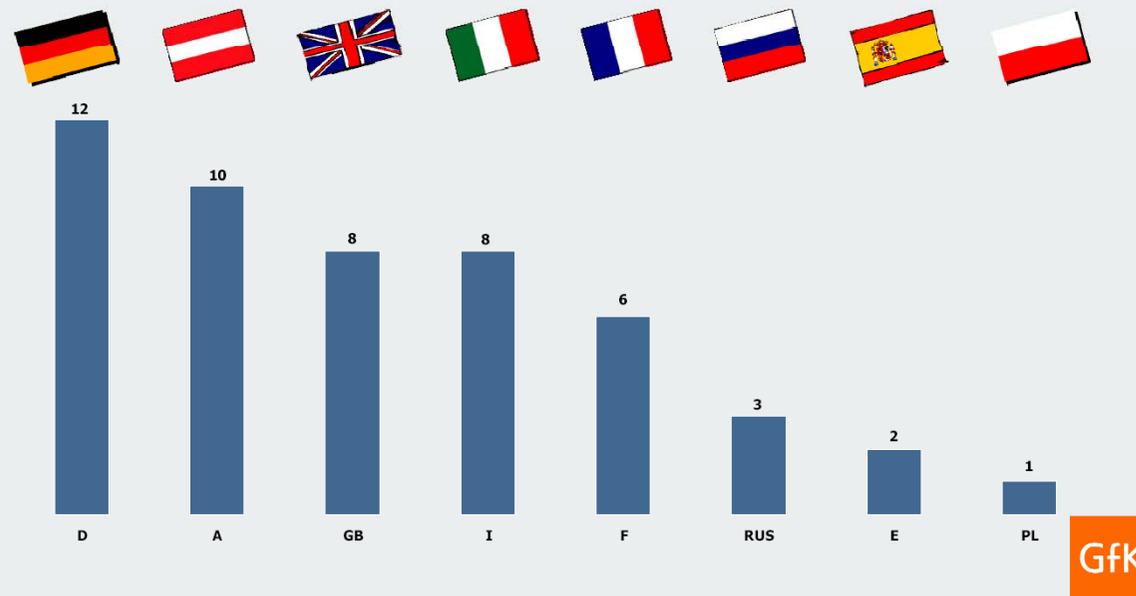
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# Changing consumer expectations

12% of all Germans consider climate change as *the* most urgent issue

Die Deutschen zeigen sich bezüglich des Umweltschutzes im internationalen Vergleich am besorgtesten

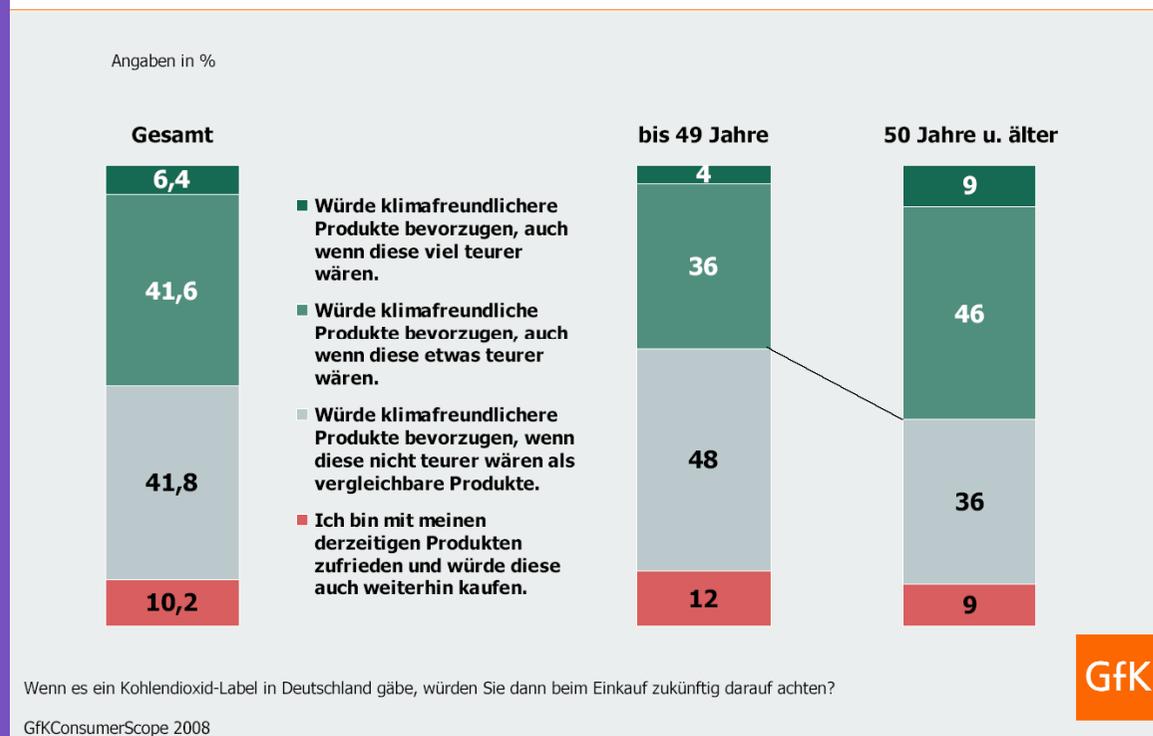
... % der Befragten nannten **Umweltschutz** als dringlichste Aufgabe in ihrem Land



# Changing consumer expectations

Almost every second German would pay a premium for climate friendly products

Ein Aufpreis für klimafreundliche Produkte wird von fast jedem zweiten Verbraucher gedanklich akzeptiert -



# EU policy response

Subsidy schemes shifting from price support to multifunctional added value

## Food Safety

Food Safety, Food Security, Health,  
Traceability & Transparency, Consumer Protection



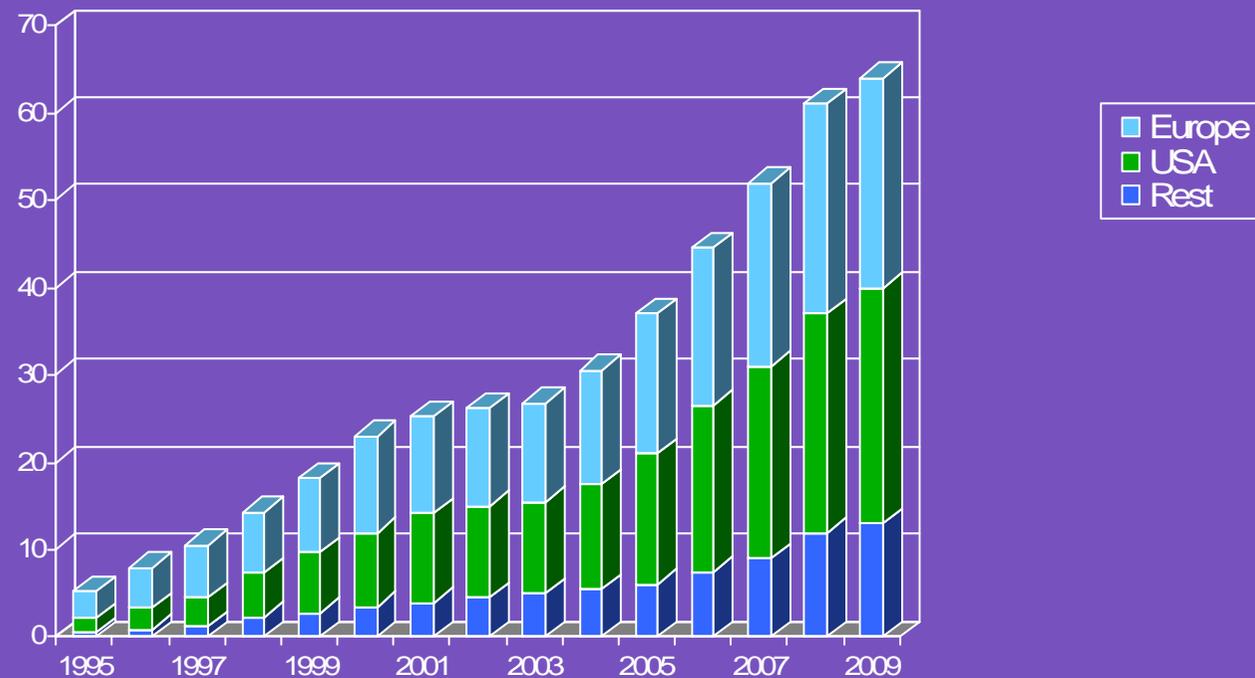
## 'Green and Blue' Services

Clean soils, waste, recycling, water, air, emission reduction,  
biodiversity, animal welfare, nature conservation, country side

## Rural Development

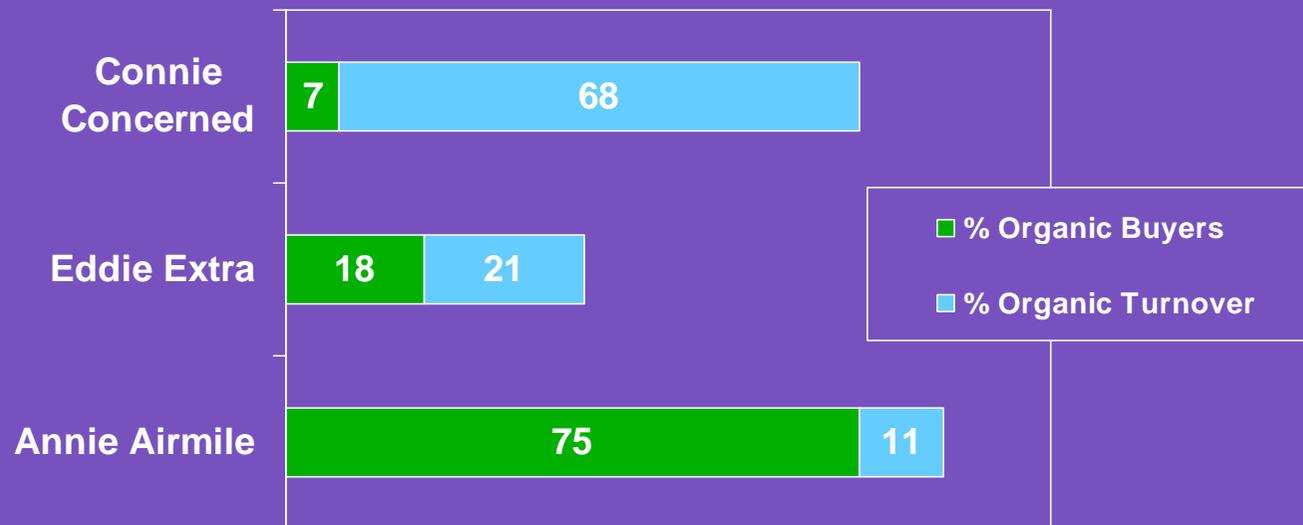
Regional Integration, Community.  
Care Farms, Cultural Heritage, Landscaping

# Global organic market in US\$ billion



Source: IFOAM Market Data 2008

# Who is driving trend



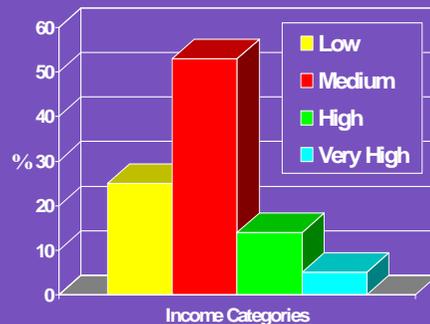
Source: TNS 52 w/e May 2008. Segmentation based on CMA data

# Beyond Organic

- Age between 20 and 85
- Females
- Families with young children
- Educated
- Concerned
- Urban
- Cosmopolitan
- Recession resilient

Potential  
20-25%  
of society

- Civil Society
- LOHAS
- Moral Hedonists
- Urban Regionalists
- Cultural Creatives
- Innovators & early adapters
- Trend setters
- Opinion leaders

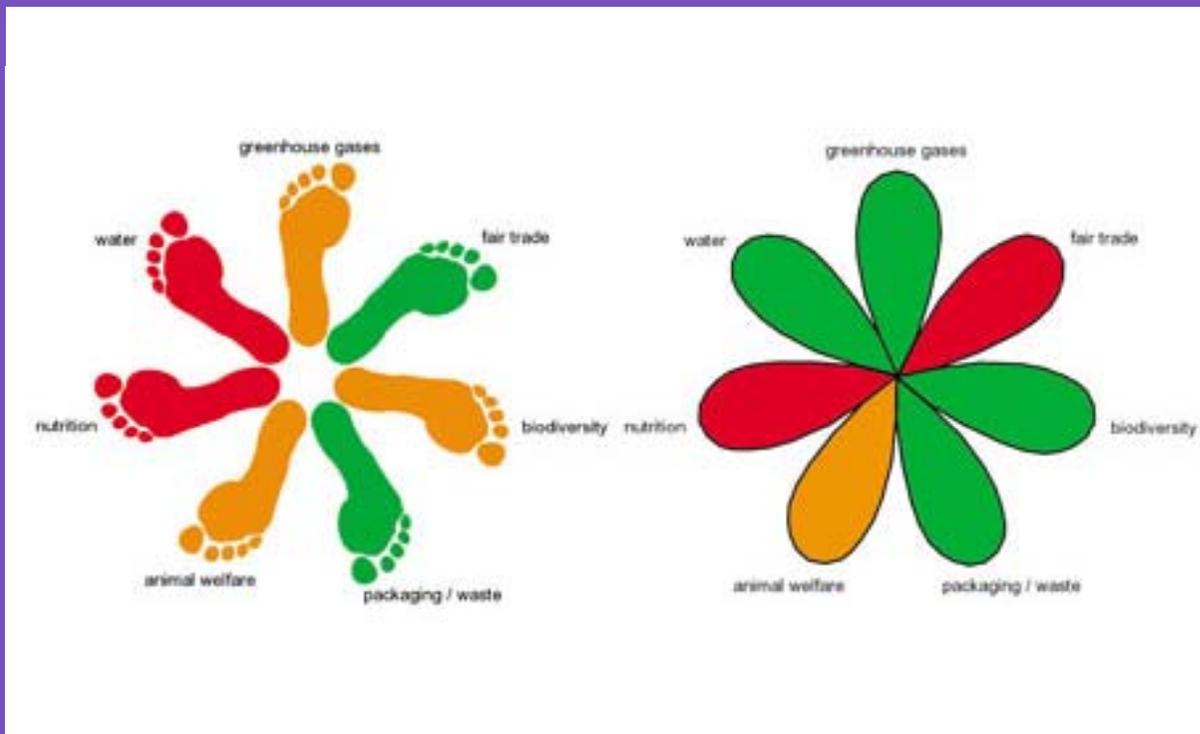


Majority medium income:  
awareness elite, no economic elite

Source: CMA 2008

# Multi value communication

In anticipation of the sustainability Wikipedia...



# Multi value communication

## Re-grouping social and environmental Key Performance Indicators

### Social Footprint:

- Personal development and culture
- Community and equal opportunities
- Fair distribution of wealth
- Freedom
- Justice
- Solidarity

### Environmental Footprint:

- Soil, mineral resources, waste
- Water resources
- Biodiversity
- Clean air, CO2
- Animal welfare
- Energy
- Earth
- Water
- Air
- Fire

# Sustainability Flower



# Sustainability Flower

Sustainability Flower™



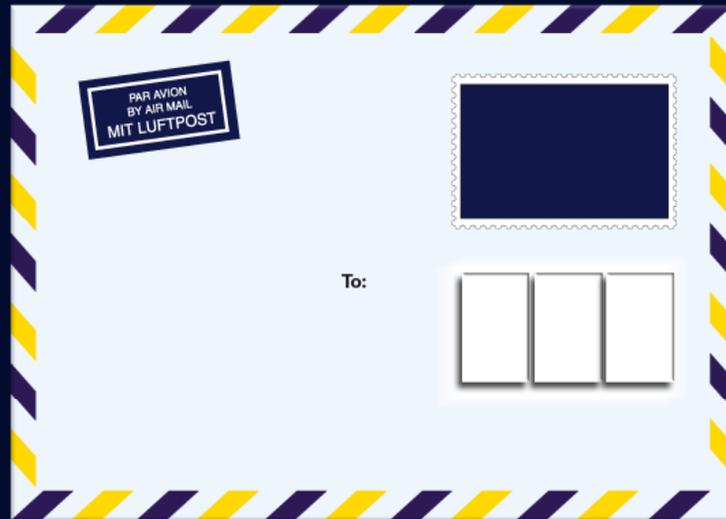
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# You've got mail...



natureandmore.com



↳ ENTER LABEL CODE HERE

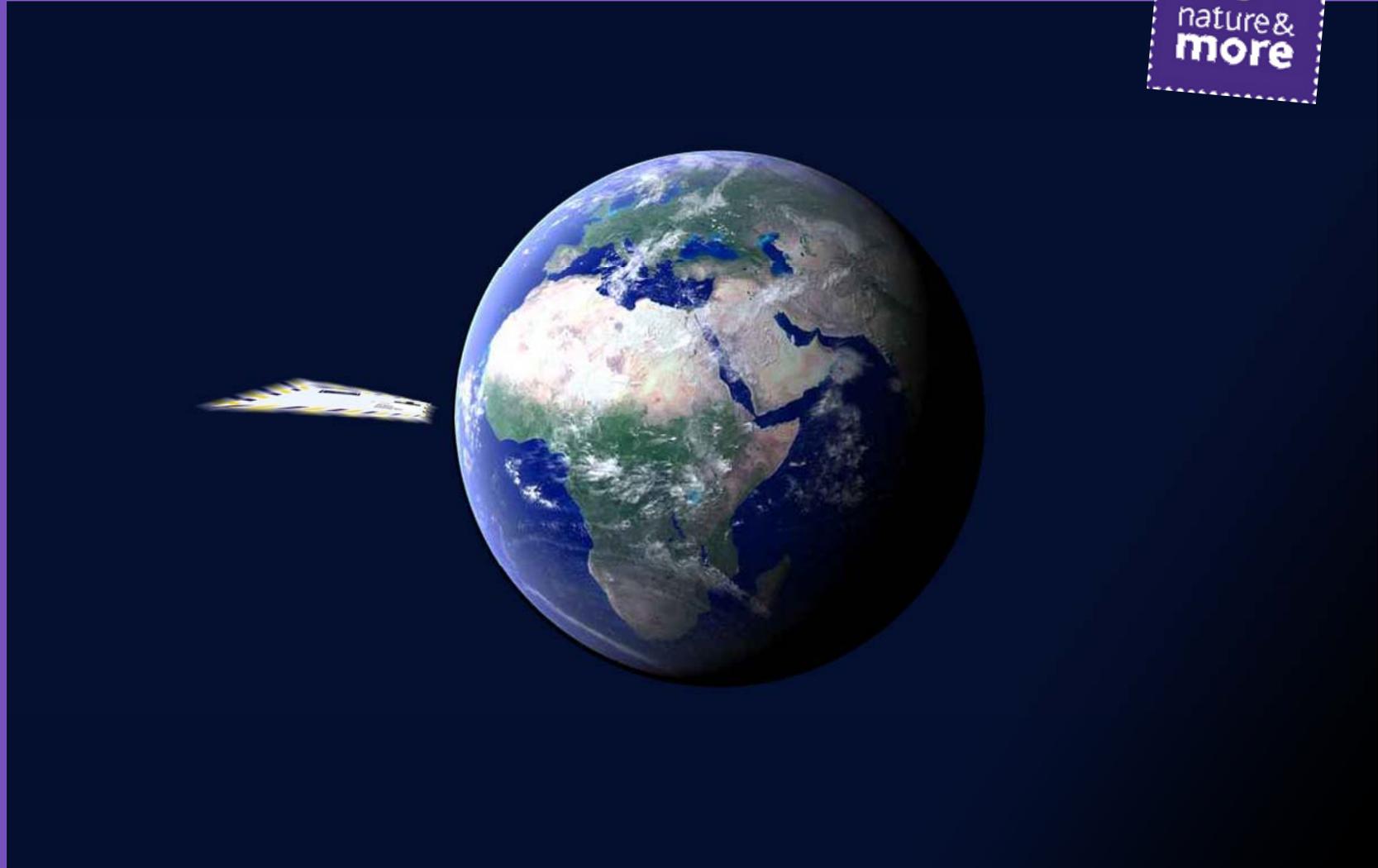
[SKIP INTRO](#)

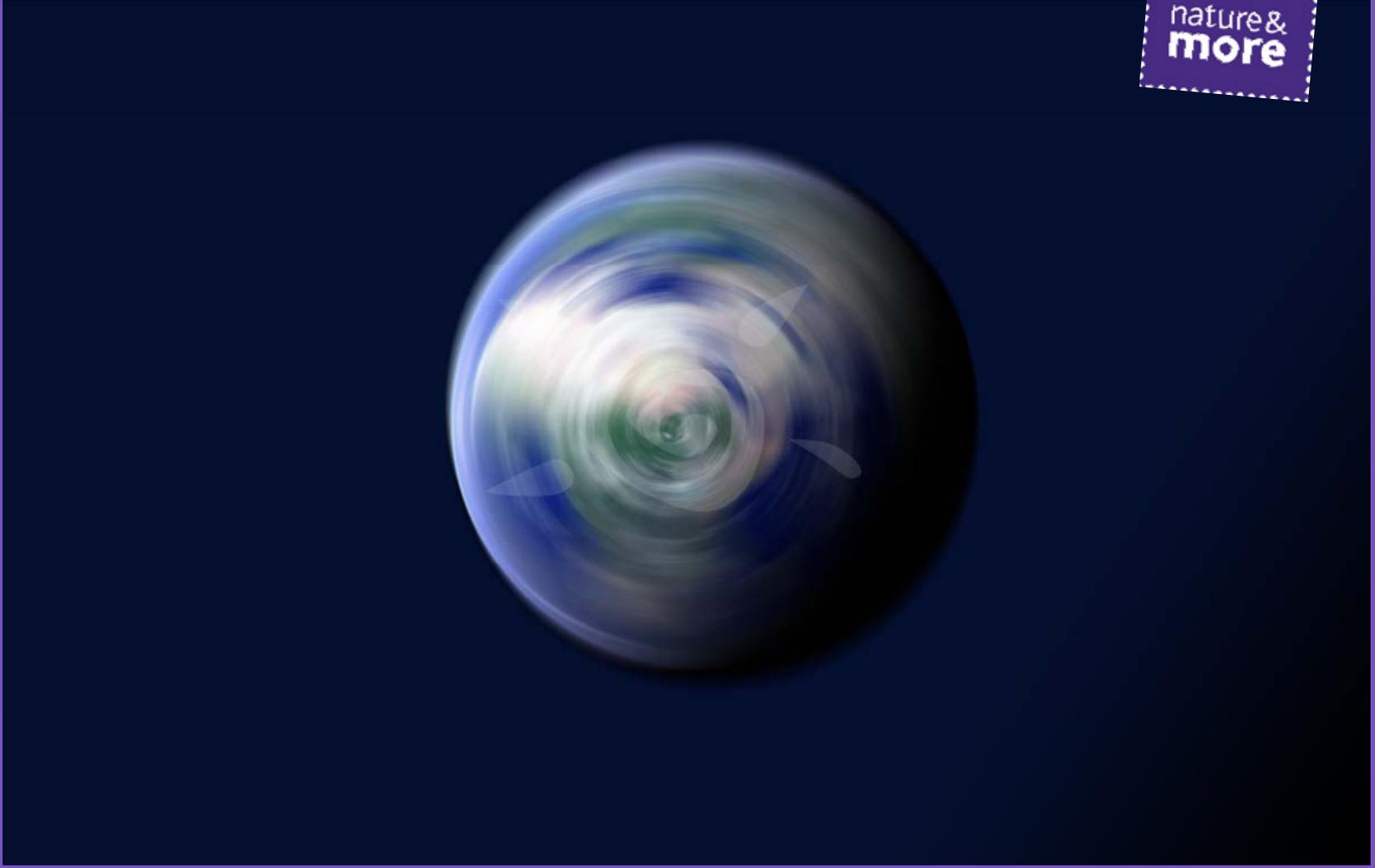


SUCCESS!

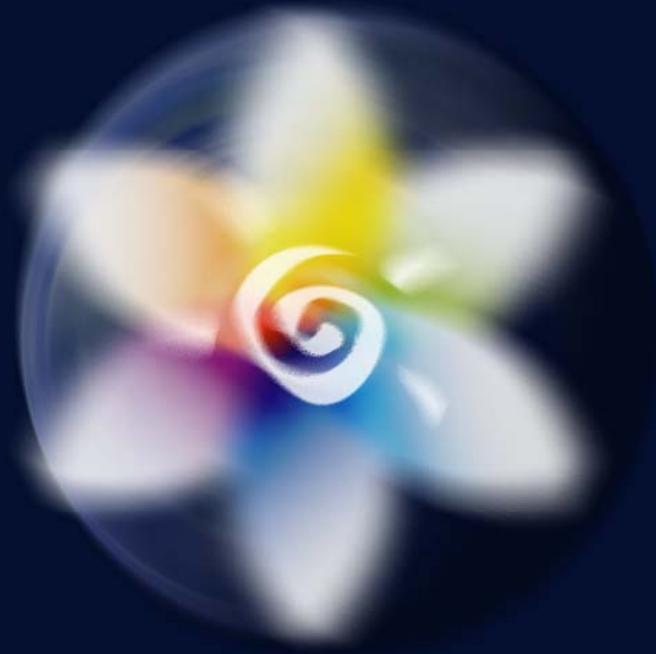
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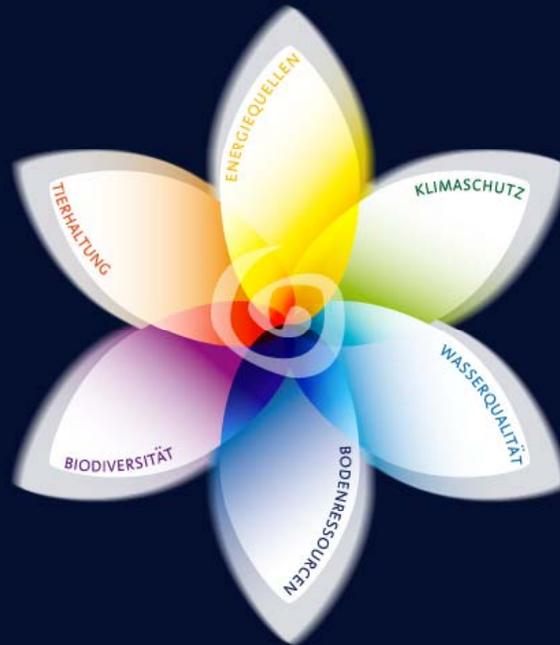














(play YouTube Movie)



(end YouTube Movie)



- [Growers](#)
- [Products](#)
- [Organic](#)
- [Social](#)
- [Fairtrade](#)
- [Climate](#)



 **PRODUCT CODE**

**SITE SEARCH**

**SUBSCRIBE TO NEWSLETTER**



**Welcome**  
 Nature & More was created in response to consumer demand for healthy, organic and fairly traded food. Our aim is to communicate the commitment and effort that individual growers make towards the planet and its people in order to empower consumers to make informed purchasing decisions.

**Product of the week:**  
**Fresh, Green, Juicy Organic Limes from Javier Moreno / Fairtrasa.**  
**Enter code 450 and learn more about this passionate grower**

**Welcome to our new and improved website!**  
 We hope you like the changes we have made ! We are still working hard to make the site even more interesting, consumer friendly and informative and therefore we genuinely welcome any tips, comments or ideas you may have. many thanks !

 **Bio Exotica pineapples now Fair Trade !!**  
 We are proud to announce that as of the beginning of May 2009, all our organic pineapples from Ghana are also Fair Trade certified !

Nature & More strives to continuously increase transparency, mutual awareness and shared responsibility of all stakeholders in the food supply chain with regards to food quality, ecology and social justice.

# natureandmore.com



The screenshot shows the homepage of natureandmore.com. At the top, there is a navigation bar with 'nature & more home' and a menu with 'Growers', 'Products', 'Organic', 'Social', 'Fairtrade', and 'Climate'. Below this is a search area with a world map icon and fields for 'PRODUCT CODE', 'SITE SEARCH', and 'SUBSCRIBE TO NEWSLETTER'. The main content area features a 'Organik Time' section with a large image of a pink apple and a video thumbnail. Below this is a 'Farm Description' section with a circular diagram of environmental factors (animals, energy, air, water, soil, plants, freedom justice solidarity) and a paragraph of text. To the right, there are two news items: 'Local Community' and 'Prince Charles visits Nature and More Partner'. At the bottom right, there is a 'Products grown on this farm' section with images of kiwi and an apple.

Code

Prince Charles visiting Nature & More partner



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# Check his carbon footprint...



The screenshot shows the website's navigation menu with 'Climate' selected. The main content area is titled 'Climate' and contains several paragraphs of text explaining the company's carbon footprint and its commitment to sustainability. A circular logo for 'Nature & More Climate Neutral Product' is visible on the left. At the bottom of the page, there are links for 'Contact', 'About us', 'Disclaimer', and 'Login'.

## Climate Neutral Fruit

Every kilogram apples causes 1.55 kilogram of carbon dioxide to be released in the atmosphere due to production, transportation, warehousing and distribution (not including your transportation to the store).

To neutralize this negative effect on the environment, the CO2 emissions for this product are compensated for, using carbon credits generated from organic composting, which provides additional income to the growers participating in the program.

For more information click here



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# Full Product Cycle Assessment



# Climate Neutral Certification



- Methane gas avoidance
- Nitrous Oxide gas avoidance
- Carbon sequestration

Verified Emission Rights issued by  
Kyoto Protocol designated authority



TÜV certified  
climate neutral labelling



Nature & More  
Climate Neutral Policy

- Inform
- Reduce
- Compensate (with sector internal carbon credits)



# Communicate...



**vierlinden Bio Supermärkte Preisgekrönt!**

**SCHROT & KORN**

**Jubelpreise...** Angebote gültig vom 23.2. bis 28.2.2009

**...bei vierlinden! Beste Bio-Supermärkte 2008**

**Bio Birne Williams** HKL II Per Schiff neue Ernte frisch zu uns. Argentinien **3.49**

**Andechser Natur Bio Körniger Frischkäse** 20% Fett. 200 g Becher **1.29**

**Bio Vorarlbergkäse Langen** Sieben Bauern Hörbranz. Angenehm würziger, dennoch salzarter Bergkäse. 45% Fett i. Tr. Aus unserer Bedienungstheke. 100 g **1.79**

**Bio Lyoner/Fle...** Aus unserer...

**Bio Roggenk...** vollkornbäckerei schubert **3.80**

**2.99** Aktion

**2.22** Aktion

**0.99** Aktion 100 g = 0,50

**1.11** Aktion

**0**

**Frisch.Pur.Bio.** 80335 München • Seidlstraße 5/Ecke Marsstraße 25 • Tel.: 089-512 657 87 • Öffnungszeiten: Montag - Samstag, 7:00 - 20:00 Uhr  
Angebote gelten auch für unseren vierlinden Bio Supermarkt in 85386 Eching • Wielandstraße 14



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# Meet the grower ...



...and his sustainability flower



more nature & more ▶

# Capitalising on sustainability



Why commodifying your product if you have a unique story to tell !



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