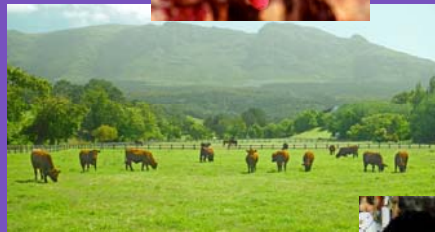


# CHANGING CONSUMER EXPECTATIONS



HEALTHY



ORGANIC



FAIR

Volkert Engelsman  
Sofia, September 2009

**eosta**  
*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**

**5 INSECTICIDES**—combined in one super spray—D.D.T., Chlorobenz, Lactone, Pyrethrum and Diquatol. Kills:

**KILLS** all common household pests—cockroaches, mosquitoes, flies, beetles, ants, etc. Kills on contact, no need to be and away.

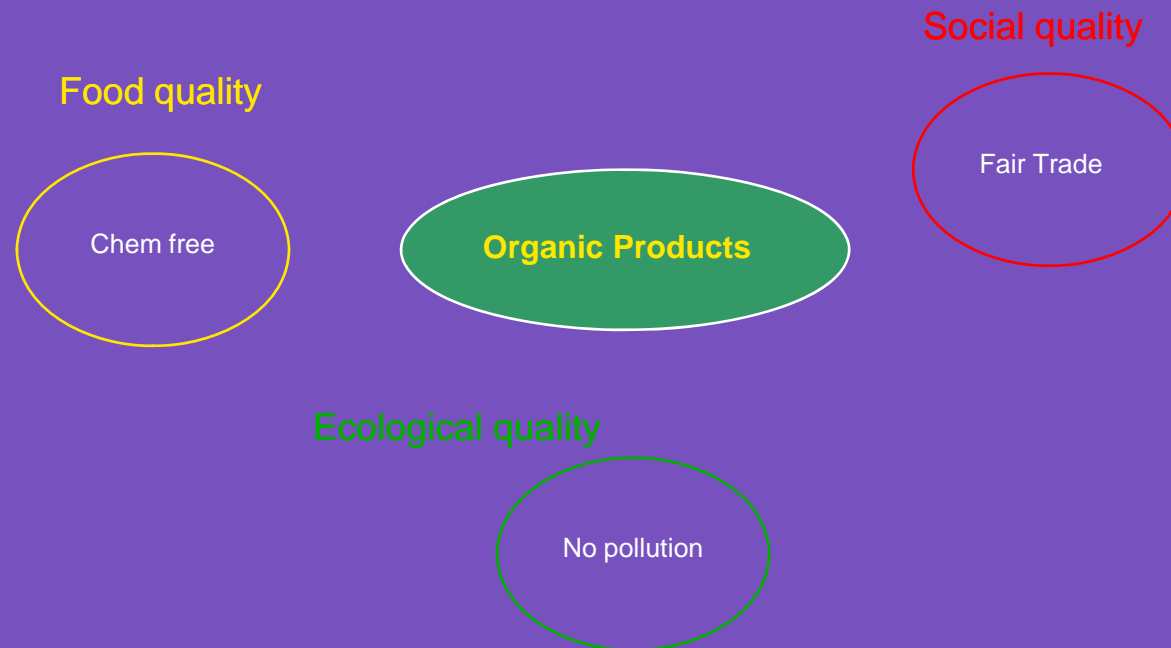
**SUPER EFFECTIVE** as a spray or as a dust. Kills on contact or by light or heat. Kills on contact. Kills on contact. Kills on contact.

**EXTRAORDINARY**—the new "super" insecticide spray that is truly more effective than D.D.T. or any other insecticide. Yet, it is also more economical. Black Flag Super Insect Spray is SAFE to use around the family. It is safe to use around the family. It is safe to use around the family.

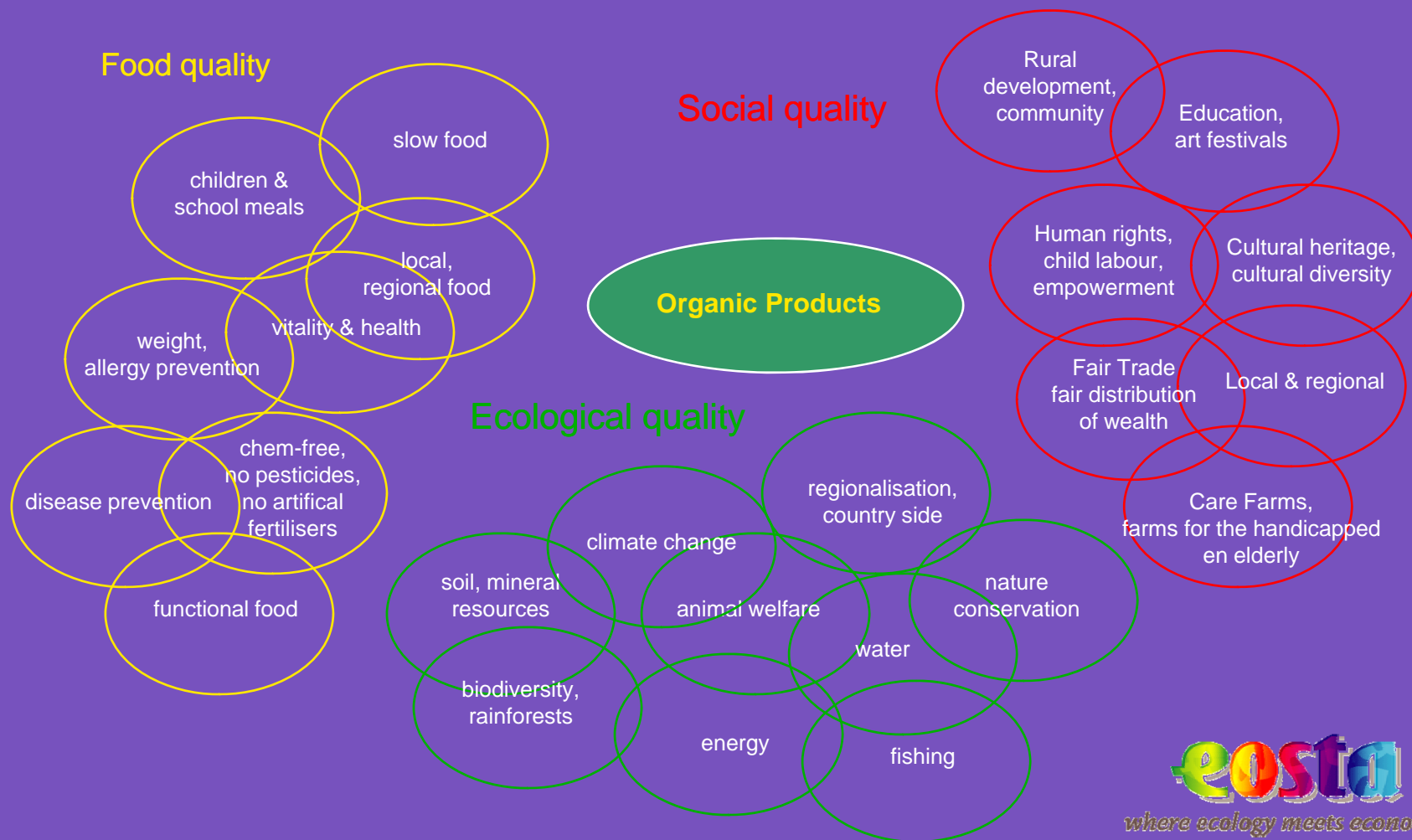
**AT ALL STORES NOW - BUY A CAN TODAY - ONLY 49¢ PER CAN**

© 1948, Radian Corp., 127 New York Ave. New York 15, N.Y.

# Historical key consumer interests



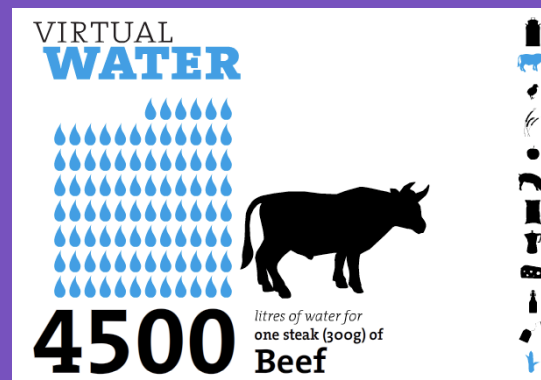
# New key consumer interests



# Changing consumer expectations



# Changing consumer expectations

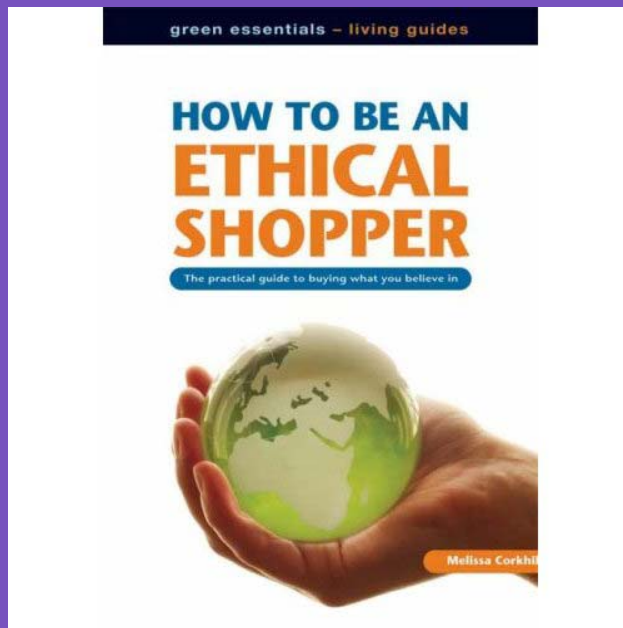


# Changing consumer expectations





# 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'

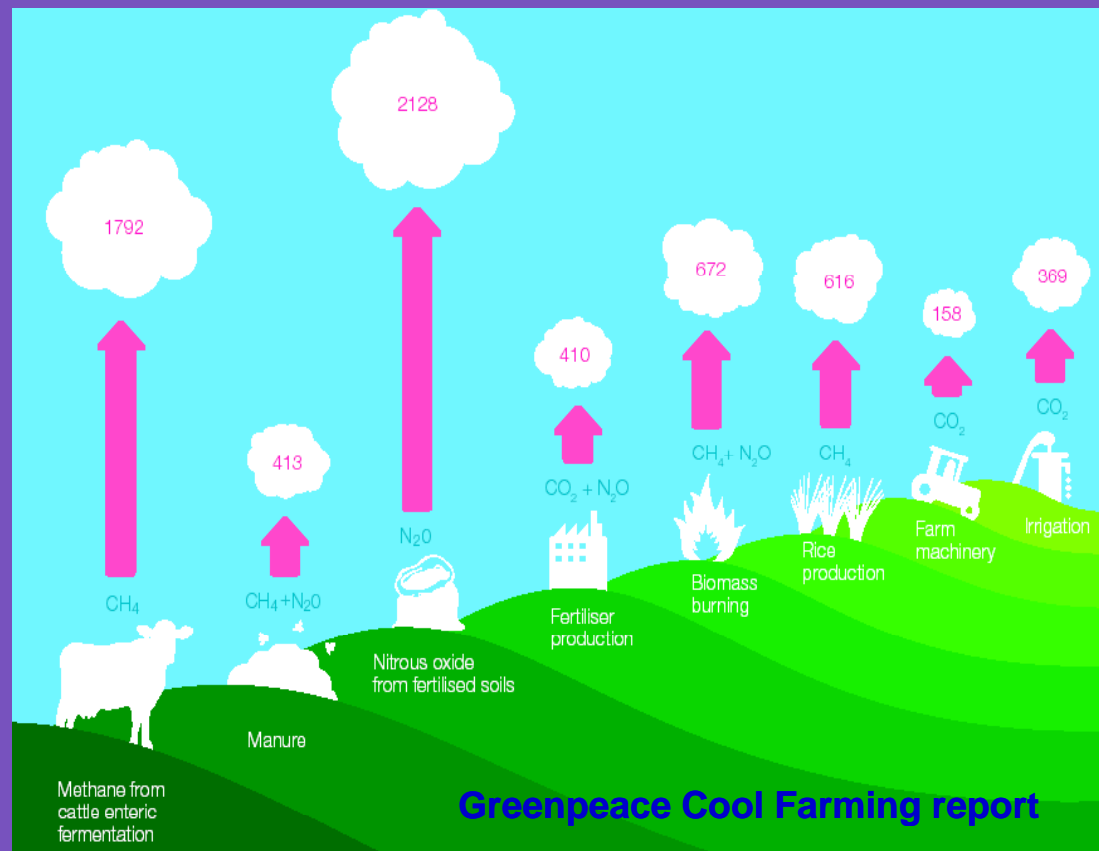


## Al Gore

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

# Climate Change

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



External costs of mineral fertiliser not accounted for in costprice:

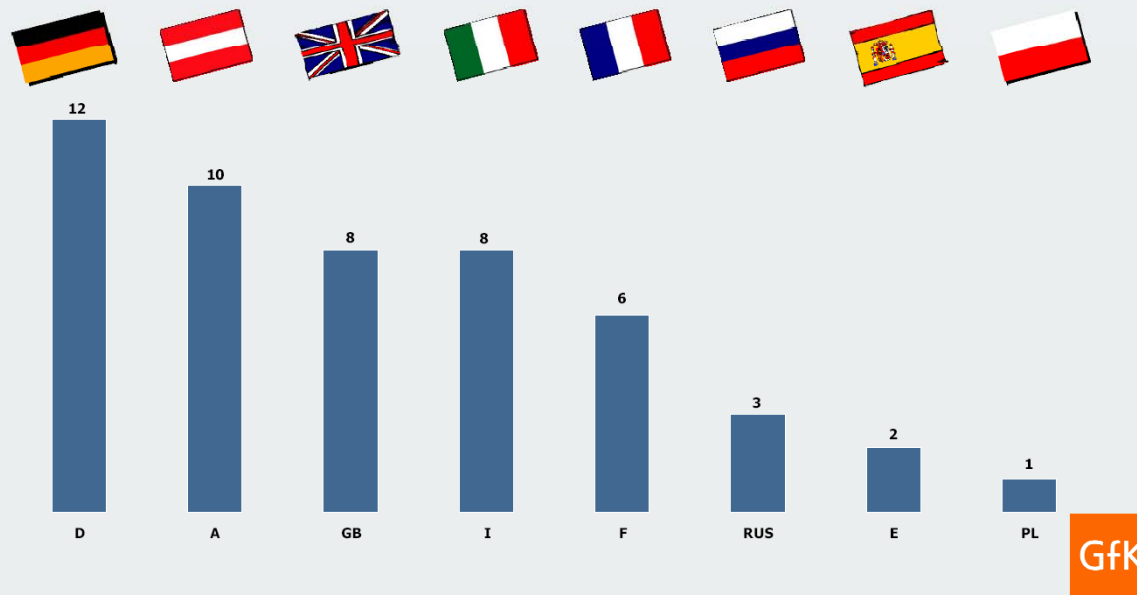
- Climate change
- Soil degradation
- Water holding capacity of the soil
- Loss of biodiversity
- Decreasing pest & disease resistance

# 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

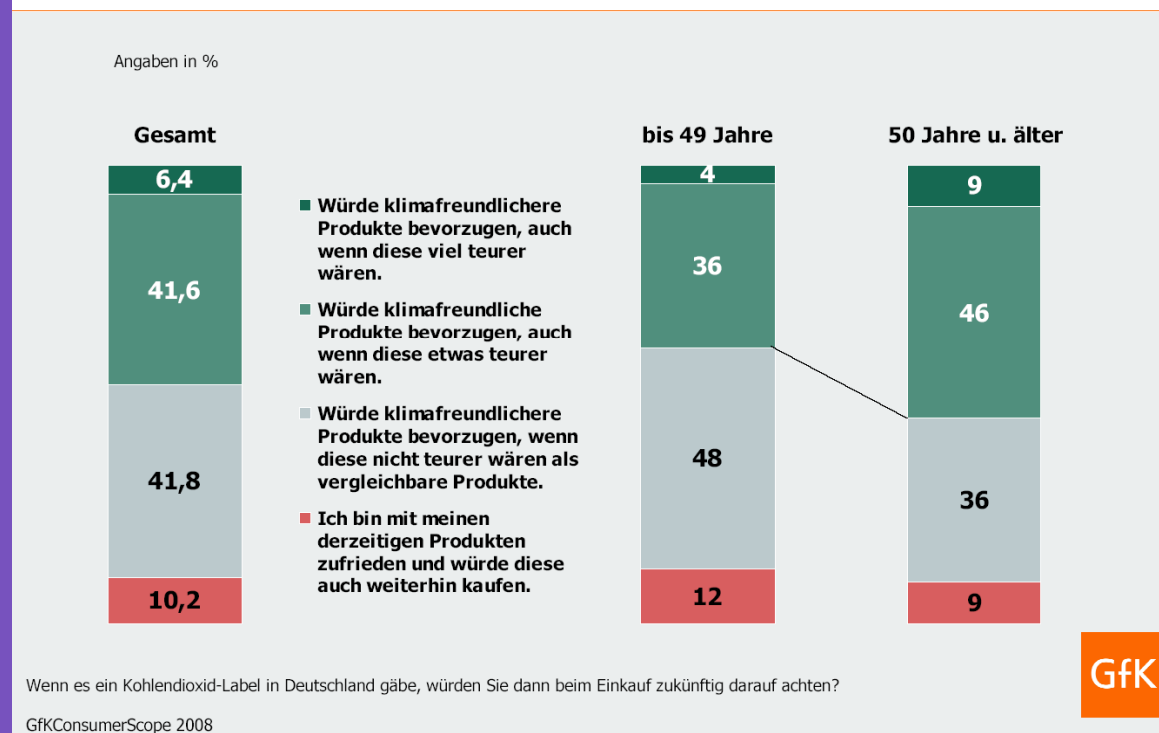
... % der Befragten nannten **Umweltschutz** als dringlichste Aufgabe in ihrem Land



# 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



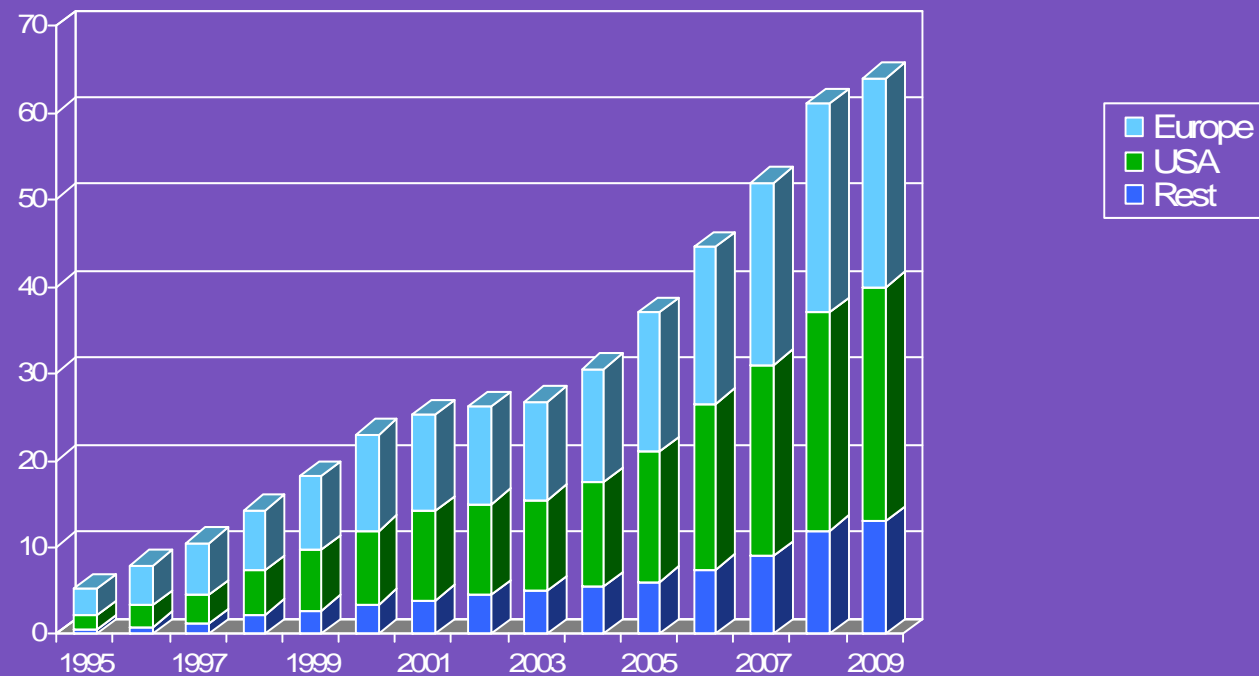
## 'Green and Blue' Services

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

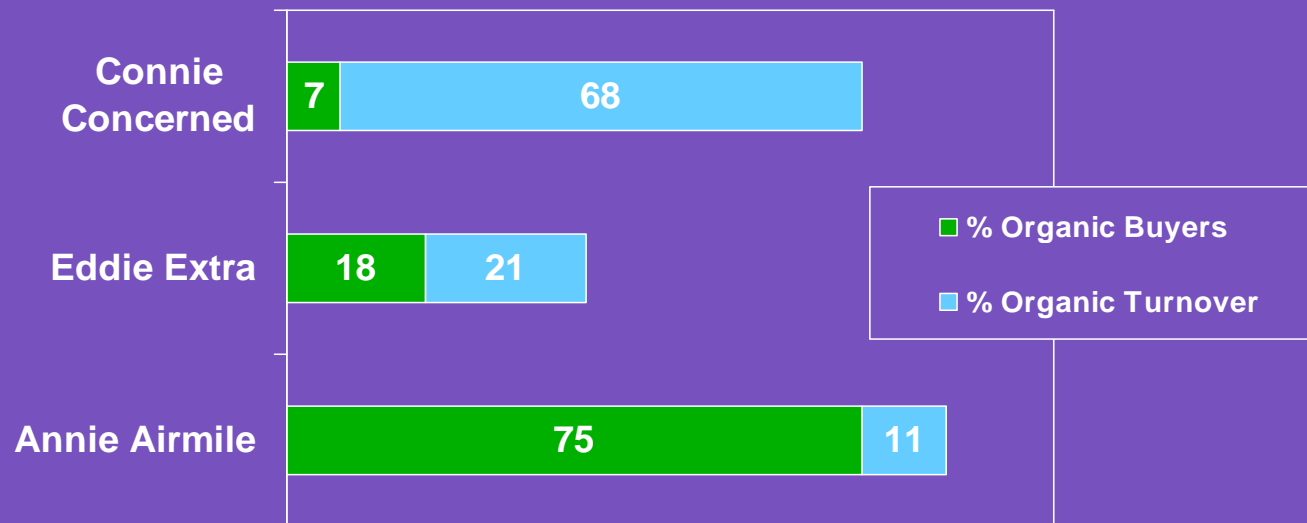
# Global organic market in US\$ billion



Source: IFOAM Market Data 2008



# Who is driving trend



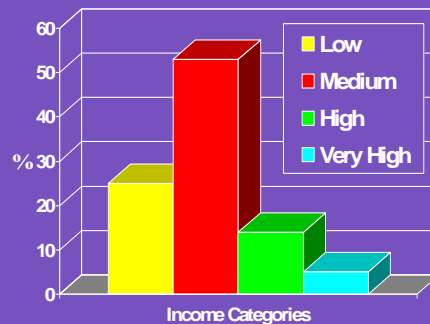
Source: TNS 52 w/e May 2008. Segmentation based on CMA data

# 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

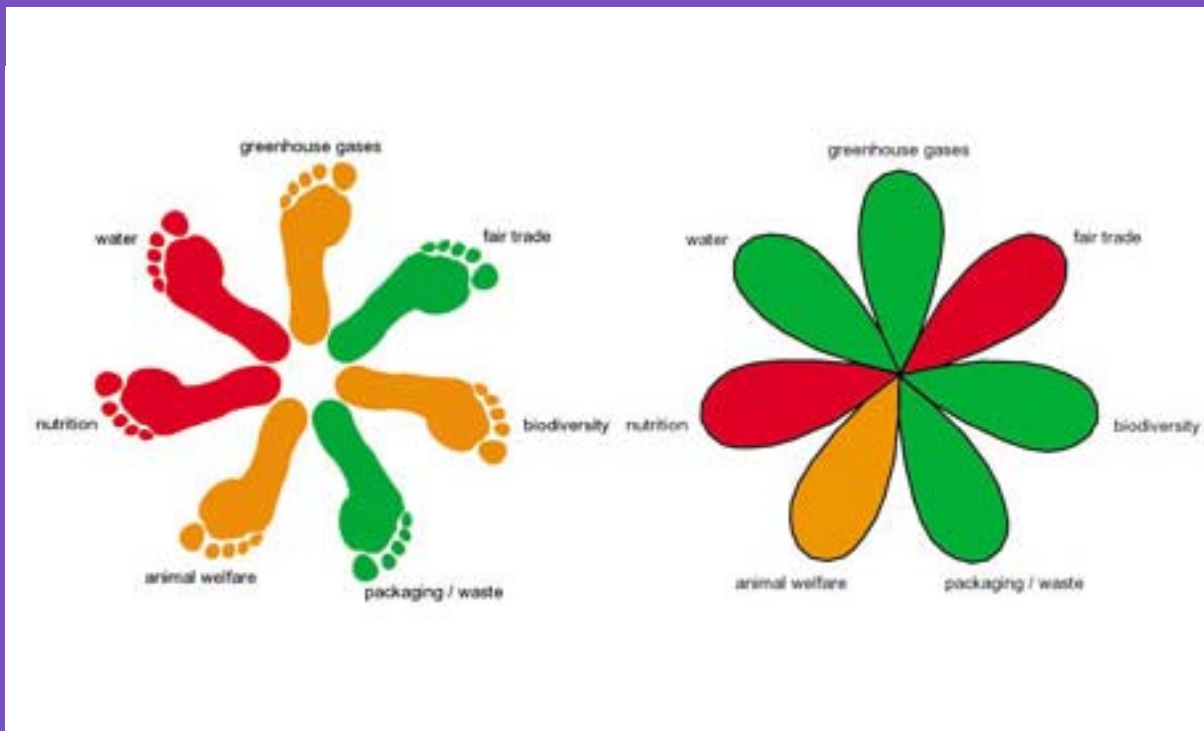


Majority medium income:  
awareness elite, no economic elite

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

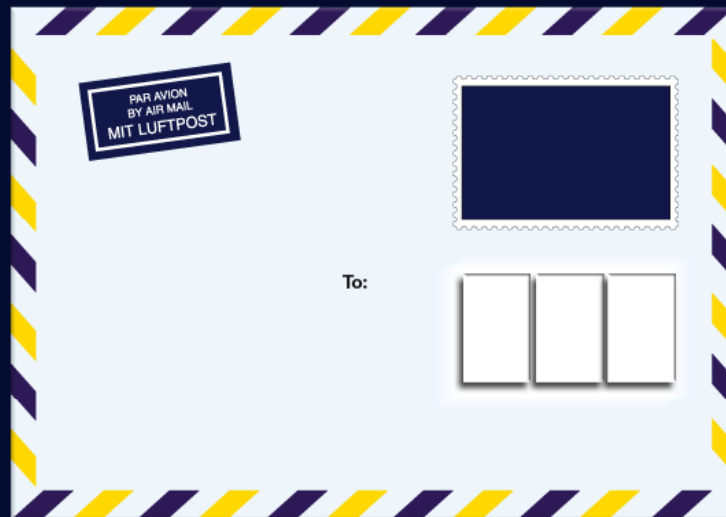


# You've got mail...



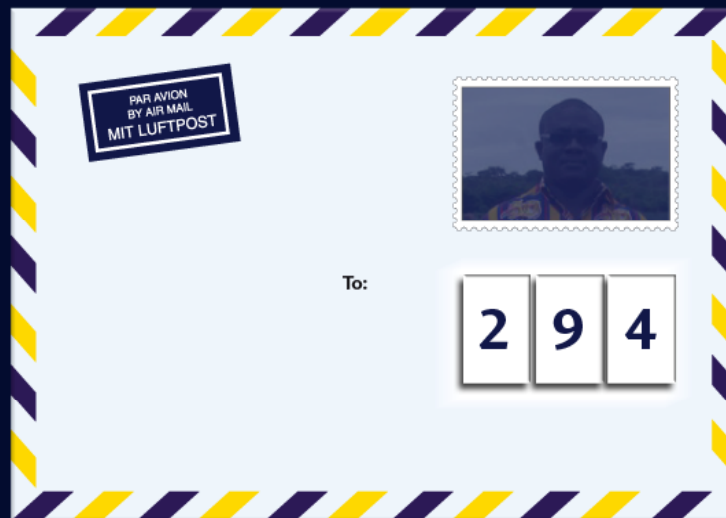


natureandmore.com



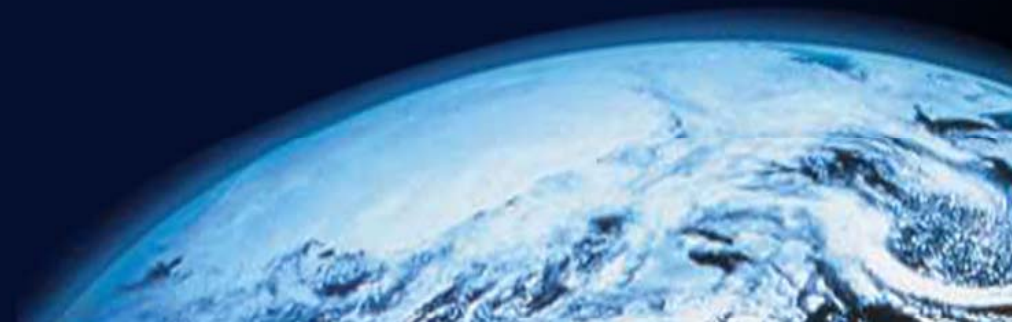
ENTER LABEL CODE  
HERE

SKIP INTRO

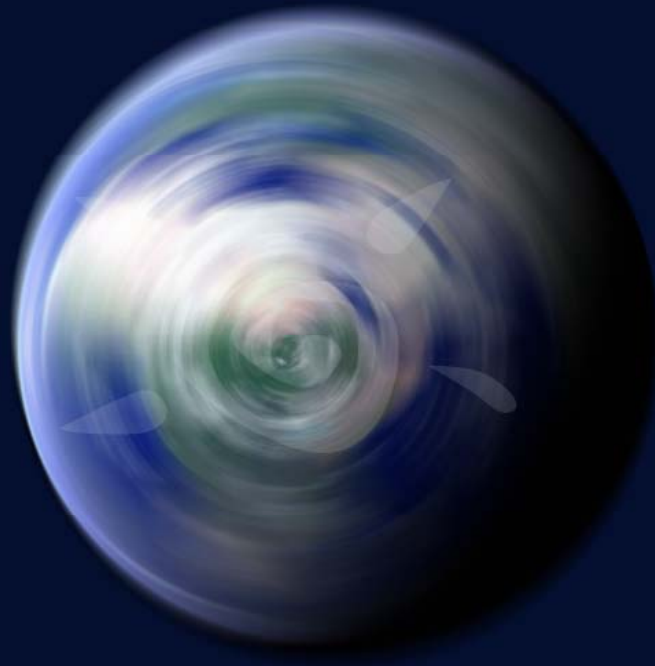


SUCCESS!

SKIP INTRO

















(play YouTube Movie)



(end YouTube Movie)

[Growers](#)[Products](#)[Organic](#)[Social](#)[Fairtrade](#)[Climate](#)**PRODUCT CODE** enter it here **SITE SEARCH** enter keywords **SUBSCRIBE TO  
NEWSLETTER** enter email 

### 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 !



certified !

### 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

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.

[Contact](#) | [About us](#) | [Disclaimer](#) | [Login](#)

# natureandmore.com



**nature & more home**

Growers | Products | Organic | Social | Fairtrade | Climate

**Organik Time**

PRODUCT CODE  
enter it here

SITE SEARCH  
enter keywords

SUBSCRIBE TO NEWSLETTER  
enter email

Hi, I'm Miquel from Huertos Organicos, Chile

**Farm Description**

Huertos Organicos de Chile is a group of agricultural companies comprising of producers and exporters of fresh fruit. These companies have recognized the ever increasing demand for organic fruit and together they have made a commitment to sustainable agricultural production. The majority of Huertos Organicos farms are involved in organic production of wine grapes, but apples and table grapes are also produced. Being involved in winemaking provides Huertos Organicos with a sound financial basis to employ modern technology and combine these with proven organic practices. Given such forward thinking it is not surprising that university students come and visit the farms to find out more about this (new/old) way of farming.

The seven farms associated with Huertos Organicos vary substantially in size: Fundo Llalagua in Las Perdices totals 6.7 hectares and Santa Emiliana consists of 1,500 hectares, the majority of which are natural forest in a watershed area, which also protects the farms from undesired influences. Among the 160 hectares of newly planted vineyards is a state-of-the-art winery and a farm building, in which students as well as farm workers receive training and instruction.

**Local Community**

It is a fact that organic agriculture has a positive effect on the environment, the biodiversity etc.

Generally speaking when businesses set up, the local community also profits as the farm provides work and income.

**Prince Charles visits Nature and More Partner**

Last month Prince Charles and his wife Camilla Parker Bowles visited Nature and More partner, Organik Time. Seeing the Prince's profound interest for sustainable agriculture it comes as no surprise that he visited one of Chile's most important players in this field.

**Products grown on this farm**

**Prince Charles visiting Nature & More partner**



**eosta**

where ecology meets economy



# Check his carbon footprint...





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



## Climate

Our lifestyle in the Western world has a tremendous influence on the worldwide climate. Through extensive use of technology we generate a lot of greenhouse gases. For example every time we use a means of transport or we grow or manufacture food. Through any use of energy we release CO<sub>2</sub> which has the largest impact on our climate.

CO<sub>2</sub> collects in the atmosphere and acts as an insulation shield, which means that excess heat is no longer released into the universe. As a result of which the temperature on earth is gradually increasing. Ever since the beginning since the industrial revolution the average temperature of our planet

There is overwhelming agreement that the average world temperature is rising ever since the beginning since the industrial revolution. Scientists estimate that it will rise further between 1.4 C and 5.8 C over the next 100 years.

Rather than engage in the endless debate about whether - and to what extent - we, as humans, are responsible for climate change, Nature & More is encouraging its affiliated companies and growers to act.

One of the possibilities to reduce CO<sub>2</sub> is to plant more trees, which bind CO<sub>2</sub>. This is being done by many initiatives (such as <http://www.plant-for-the-planet.de>). Organic growers have the possibility to increase the CO<sub>2</sub> holding capacity of their soil by incorporating humus-rich compost. Nature & More stimulates compost product in many ways.

In cooperation with Soil & More International, we strive to address the world's biggest environmental and agricultural problems, such as soil degradation, climate change, increasing carbon dioxide emissions, the excessive use of water and the increasing amount of waste. Using a sustainable business approach that unites ecological and social aspects with economic success, we contribute to making this world a healthier, better place for future generations.

If you want to support our growers' efforts, look out for products bearing the Nature & More climate neutral logo:



[Send this](#) | [Print this](#)

...se transparency, mutual awareness and shared responsibility of all stakeholders  
...d quality, ecology and social justice.

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## 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).

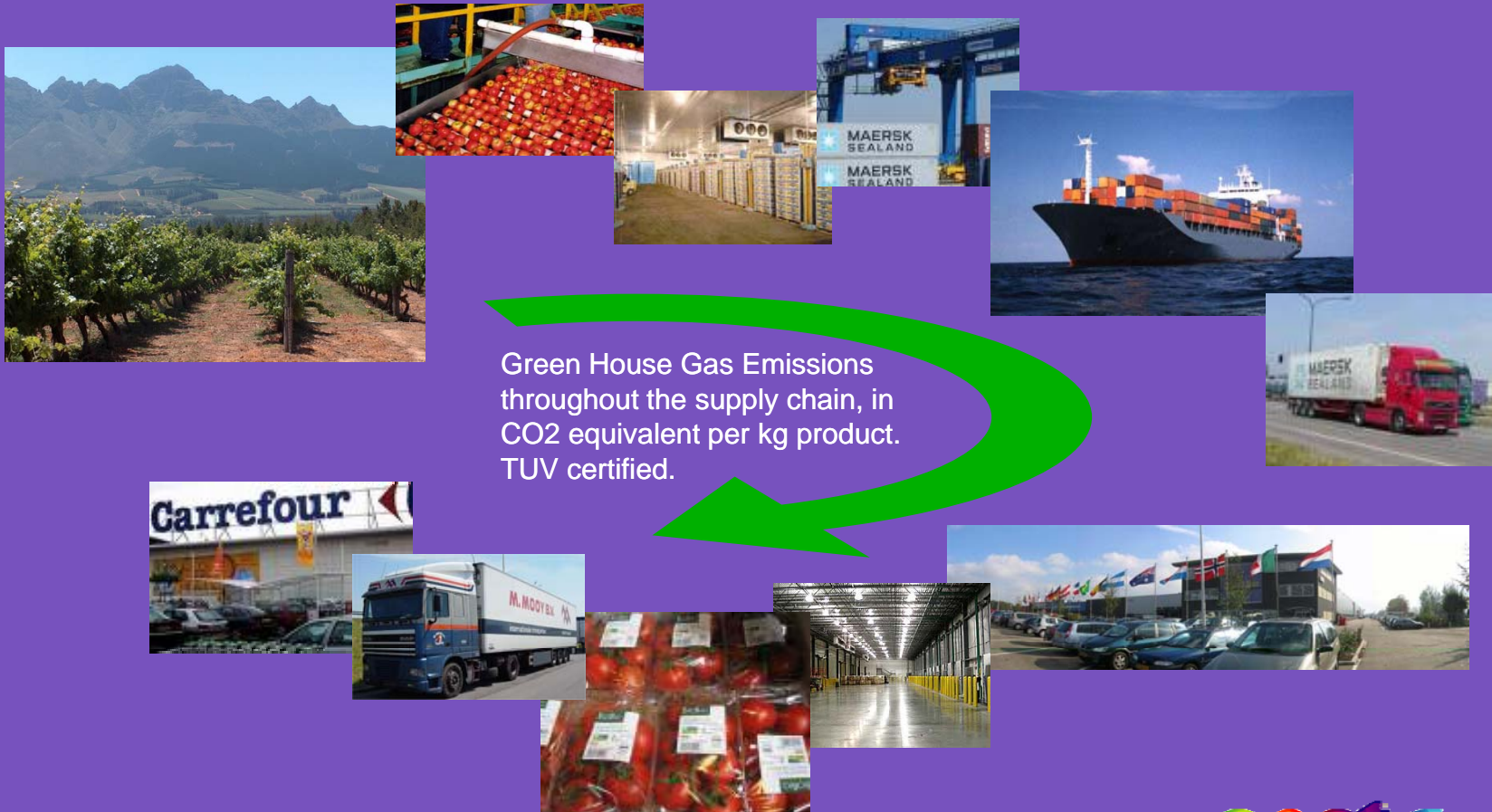
To neutralize this negative effect on the environment, the CO<sub>2</sub> emissions for this product are compensated for, using carbon credits generated from organic composting, which provides additional income to the growers participating in the program.

[For more information click here](#)

eosta

where ecology meets economy

# Full Product Cycle Assessment



Green House Gas Emissions  
throughout the supply chain, in  
CO2 equivalent per kg product.  
TUV certified.



# 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)

**eosta**  
where ecology meets economy

# Communicate...



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

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

**vierlinden Bio Supermärkte Preisgekrönt!**  
**SCHROT & KORN**  
vollkornbäckerei schubert  
**Bio Roggenkisten** 3.80 kg

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

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

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

**Bio Lyoner/Fle** Aus unserer Bedienungstheke  
**0.99**

**Frisch.Pur.Bio.** 80335 München • Seidlstraße 5/Ecke Marsstraße 25 • Tel.: 089-51265787 • Öffnungszeiten: Montag - Samstag, 7:00 - 20:00 Uhr  
Angebote gelten auch für unseren vierlinden BioSupermarkt in 85386 Eching • Wielandstraße 14

# Meet the grower ...



# Capitalising on sustainability



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



HEALTHY



ORGANIC



FAIR