



ORGANIC 3.0

EXECUTIVE SUMMARY

Just being a small niche is a thing of the past. Organic products have long since become part of mainstream consumer culture. They also have a good reputation amongst average consumers, even if they don't always end up in their shopping cart. If organic products are to play a more central role in people's lives in the future, then organic producers, organic stores and organic gastronomy need to recognise early enough the direction in which the lives of (potential) customers are developing, in order to react to the changing needs of people by providing the right offers.

It isn't possible to predict the future. But with the help of mega-trends, the big, worldwide operating drivers, that influence social development over the course of decades, it is also possible to draw relevant conclusions about the future of organic products; outline reliable scenarios and point out development potential, which is of great relevance for the industry.

In this trend study, we refer primarily to the six mega-trends that play a special role in the future of organics. Individualisation, connectivity, neo-ecology, globalisation, health and mobility. Proceeding from there, three relevant clusters have been formed, which we have given special attention to in this study. In our opinion, the upcoming challenges and opportunities are becoming more consolidated in the areas of global culture, the biography of organic health and daily organics. From this, scenarios can be derived for organics 3.0. The present study is a source of inspiration for the continuation of their successful development.



I Advancing **INDIVIDUALISATION** shows us quite plainly that nutrition is being used more and more as a tool on the search for our inner self. Individual foods, the way they are produced, the recipe, origin, but also self-compiled nutritional philosophies are increasingly becoming a means of expression for the individual. The consumption of food communicates values; food is being used as a tool for making the world a better place or for provocation.

▶▶▶ For Organic 3.0 this means:

The clearer the quality profile of organic products is defined, the easier they can develop their symbolic effect.

II "The customer is king" - To consumers of the 21st century this not only means that they can select from a variety of products, not only that these products are also produced the way they want them to be, but also that they actually help them "sustainably" cope with daily life. That is why new relationship qualities, customer integration, the support you offer them so they can live their own values daily - these factors are decisive for market success. That is why in the future, organics must be even more intensely oriented towards people's daily lives: Through better services, comprehensible and verifiable information, offensive transparency and an active exchange with consumers.

▶▶▶ For Organic 3.0 this means:

Shift from exclusive concentration on the product to focus on the needs of the customers.

III This not only includes additional efforts towards improving the organoleptic and nutritional quality of primarily processed products as well. This also includes the development of intelligent packaging that actively assists the preservation of food quality in terms of nutrients and freshness ("Active Packaging") while at the same time taking the offensive in regard to the garbage problem. This also includes gastronomic offers (incl. take-away) and services that contribute to overall complexity reduction. At a certain point, the diversity of available

offers will no longer be considered to be an advantage but instead to be a burden. Consuming in the 21st century has become a complex, permanent and highly networked process of inspiring, informing, assessing, selecting and purchasing beyond planned and predictable processes.

▶▶▶ For Organic 3.0 this means:

Service is more than just service. Service is also the right design, sensible simplification and support through technical innovations; when labelling, purchasing (curated food), cooking and preparing.

IV The power of networking (**CONNECTIVITY**) permeates all areas of life. The new organisation of people in networks - throughout societies and worldwide - open up great opportunities for the organics scene. That's because networked thinking, work in self-contained circuits and transparency for everyone involved has always played an important role in organic agriculture. In global culture, the idea of resource-sparing, sustainable production and consumption beyond agricultural production is gaining significance. In the last years, foods and cosmetics in particular have scored very well by seeming to satisfy the growing expectations of consumers even without meeting the strict organic criteria: "Natural products" and "regional foods".

▶▶▶ For Organic 3.0 this means:

Instead of defensively distancing from the competition, in the future a broadened strategy is necessary to continue to write the holistic philosophy of organic agriculture for the entire product cycle.

V The concept of sharing, revolutionises our consumptive behaviour, especially that of core organic consumers. The culture of utilising - promoted by the "Digital Natives" - as opposed to the culture of possessing, is a possible sustainable answer to the challenges of the present and of our future. Sharing not only enables better resource management in trade and

in budgeting as well as systematic charity activities; sharing also opens new perspectives on how to solve structural problems in organic agriculture.

▶▶▶ For Organic 3.0 this means:

The concept of sharing stimulates regional cooperation - keyword Community Supported Agriculture - and promotes the use of synergies between rural and urban areas. It binds consumers closer to the production making them "prosumers".

VI The subject of **HEALTH** penetrates all areas of life, influencing all markets and industries. Health is the mega-trend, which organics will also profit greatly from in the future. After many years of self-experimenting (diets, renouncing certain ingredients etc.) the desire of many people for holistic solutions is becoming evident when it comes to health. It makes particular sense for organics to focus hereby on the principle of "Soft Health" instead of wearing themselves down in senseless competition over "healthy food" with "better nutritional values" against conventional or even adapted products (functional food). In the same way that organic agriculture does not consist of individual measures, healthy nutrition also is not a question of consumption or the renouncement of certain foodstuffs.

▶▶▶ For Organic 3.0 this means:

Healthy nutrition through the consumption of organic foods alone is not attainable. This insight gives the organics sector the opportunity to newly accentuate the discussion on healthy nutrition and to guide the perspective away from monocausal health promises to systematic relationships between general lifestyle, nutrition and health.

VII What is applicable to the ecological method of production should also be a benchmark for healthy nutrition in the future. Priority for ecological diversity, optimisation of culinary variety. This new understanding of health argumentatively leads organics out of the "health trap" and nonetheless opens - accompanied by

corresponding research initiatives - new ways to distinguish themselves from conventional products. There are signs that indicate that more "health promoting potential" (ingredients) can be found in many varieties because of their neglected efficiency and profit strategies.

▶▶▶ For Organic 3.0 this means:

The return to old varieties of grains, fruit and vegetables and the cultivation thereof in organic agriculture must go hand in hand with intensive research in order to gain points not only with culinary alternatives, but also to prove their suspected health potential.

VIII In the 21st century, the world is not only characterised by increasing **MOBILITY** but also primarily by the increasing variety of types of mobility. Conversely, this promotes the strength and power of specific locations where people enjoy spending their time, locations that create identity and that bring people together. It is sometimes worthwhile for producers, processors and providers not to be mobile themselves and instead to become a real harbour for customers. To become a place that is not only defined by the sale of products but also by an environment that inspires, enables and connects, enabling sensory and sensible experiences.

▶▶▶ For Organic 3.0 this means:

Consumers consider organic products to be more than just "products". The more opportunities you have to appreciate them fully, in a cognitive and multi-sensory way in communicative exchange with others, the more they become part of a complex self-concept. This requires a special location that makes it possible.