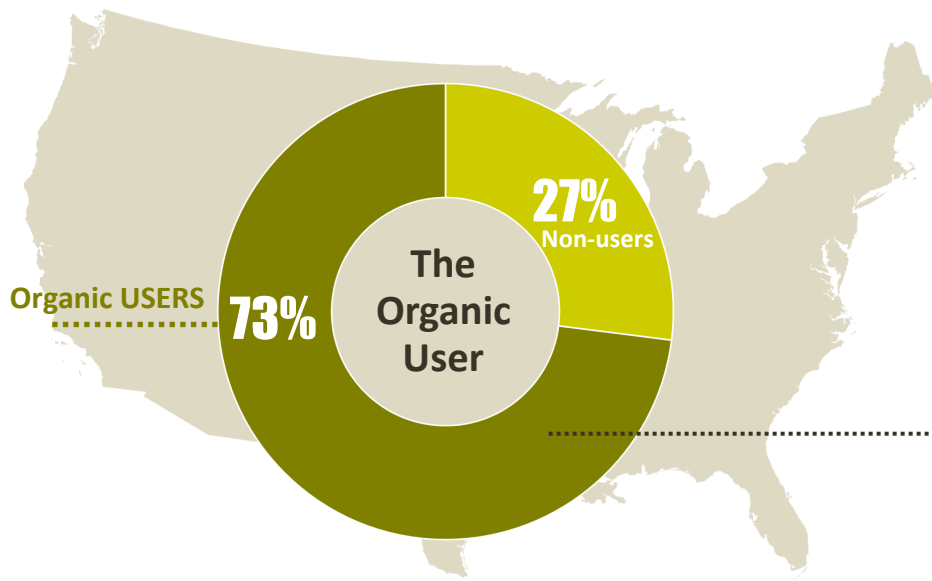


PROFILE OF ORGANIC USERS

In 1997, when The Hartman Group published its first strategic analysis of the rapidly changing organic market with the aptly titled report *The Evolving Organic Marketplace*, we accurately predicted not only a fast-changing corporate game board within a vibrant subset of consumer packaged goods (where large conglomerates would begin to dominate a fragmented market through acquisition of small, pioneering brands) but also correctly envisioned the explosive growth of the organic category. Since then, such predictions indeed proved true.

Since we first began examining the organic marketplace, we have seen consumers' approach to organic and natural products grow and evolve. Today, we find greater knowledge about and engagement with organics across all consumer segments. Here is brief glimpse at the organic and natural consumer.

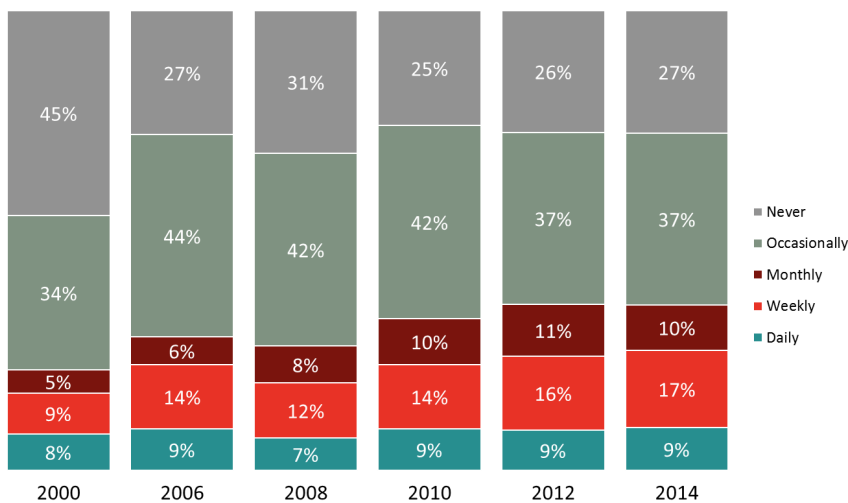


The biggest gap (11%) between organic and non-organic users is among 55- to 64-year-olds, among whom 19% are organic users and 30% are not.

About three-quarters (73 percent) of U.S. adult consumers participate in the World of Organics by buying organic products at least occasionally (based on past three-month usage). A renaissance within the Culture of Food and Beverage has brought an increasingly cultural focus on an assortment of food categories, notably local and artisanal products as well as categories that may link to organics but can also stand on their own (including fair trade, humane, cage-free or free-range).

Frequency of Organic Usage

Organic usage is holding steady, with more than a third of consumers using organics at least monthly.



"I eat organic to avoid chemicals, pesticides, and herbicides, to support farmers who take the time and integrity to farm organic, and, in the long run, for the environment." —Core Organic User

Demographic Profile

	TOTAL	ORGANIC USERS	ORGANIC NON-USERS	ETHNICITY	TOTAL	ORGANIC USERS	ORGANIC NON-USERS	REGION	TOTAL	ORGANIC USERS	ORGANIC NON-USERS
Average Household Income	\$70,571	\$78,837	\$58,732	White	78%	78%	80%	Northeast	18%	18%	16%
College Graduate or Higher	47%	50%	38%	African-American	13%	13%	14%	Midwest	21%	20%	26%
Employed Full Time	48%	51%	39%	Other	9%	10%	6%	South	37%	37%	38%
Average Age	43.4	41.5	48.5	Hispanic	12%	13%	9%	West	24%	25%	21%

Organic users vs. organic non-users. While demographic differences are not at the heart of how organic values and behaviors are expressed, there are nonetheless some differences in the demographic characteristics of consumers across the different segments. Organic users are more likely to have higher incomes and be more educated, younger, be employed full-time, and living in the West.

Source: *Organic & Natural 2014 report, The Hartman Group*