



What's NEXT?

Future Trends & Insights Shaping the Natural Products Industry

Questions Addressed

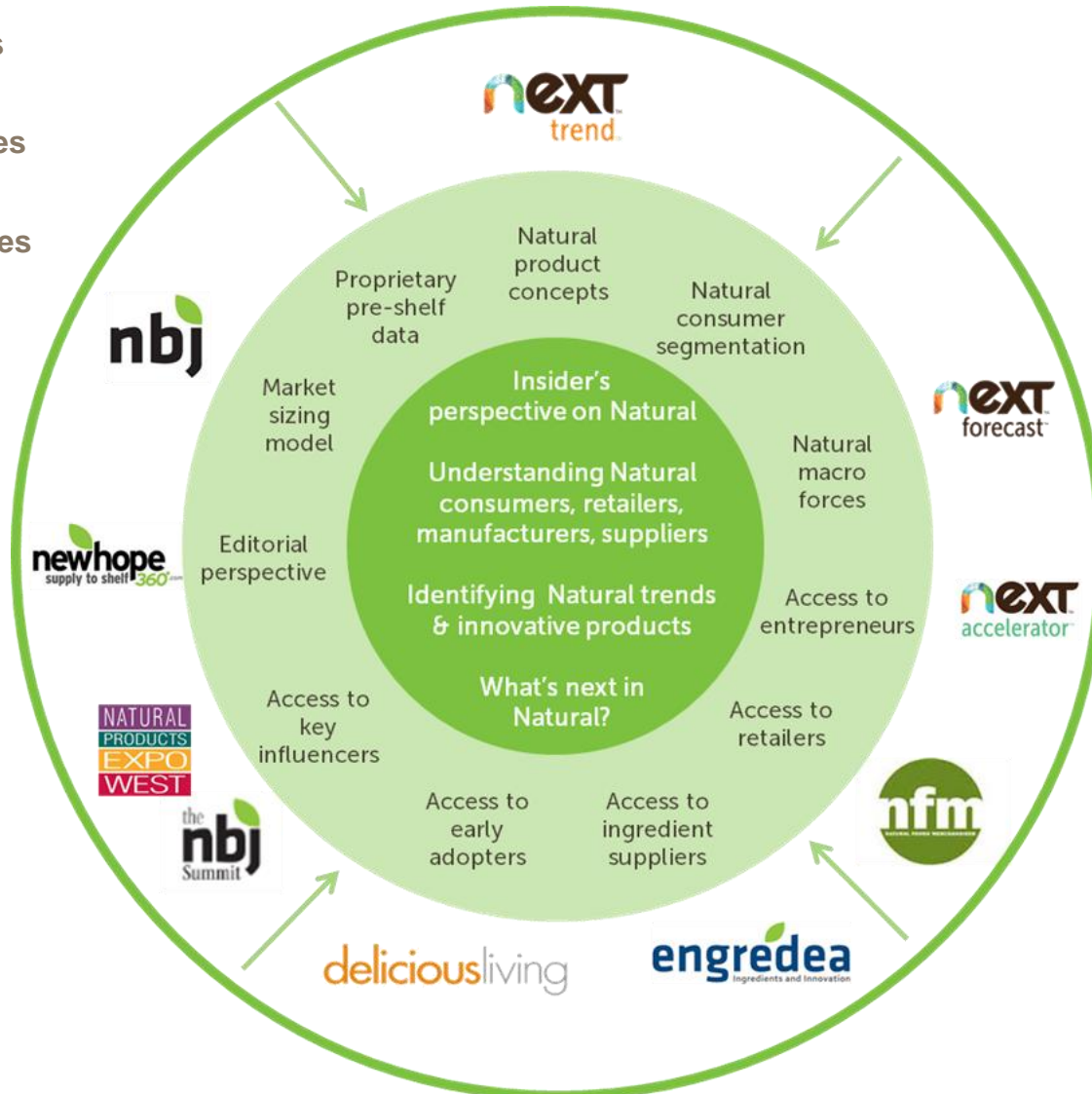
- What does today's natural products market look like? Where is the growth, and what's expected for tomorrow?
- What are the key macro forces and micro trends shaping the natural products industry?
- What are some of the newest products being launched nationwide?

Speaker

- Carlotta Mast Executive Director of Content & Insights, New Hope

New Hope's unique core competencies drive the Front-End of Innovation in Natural Products.

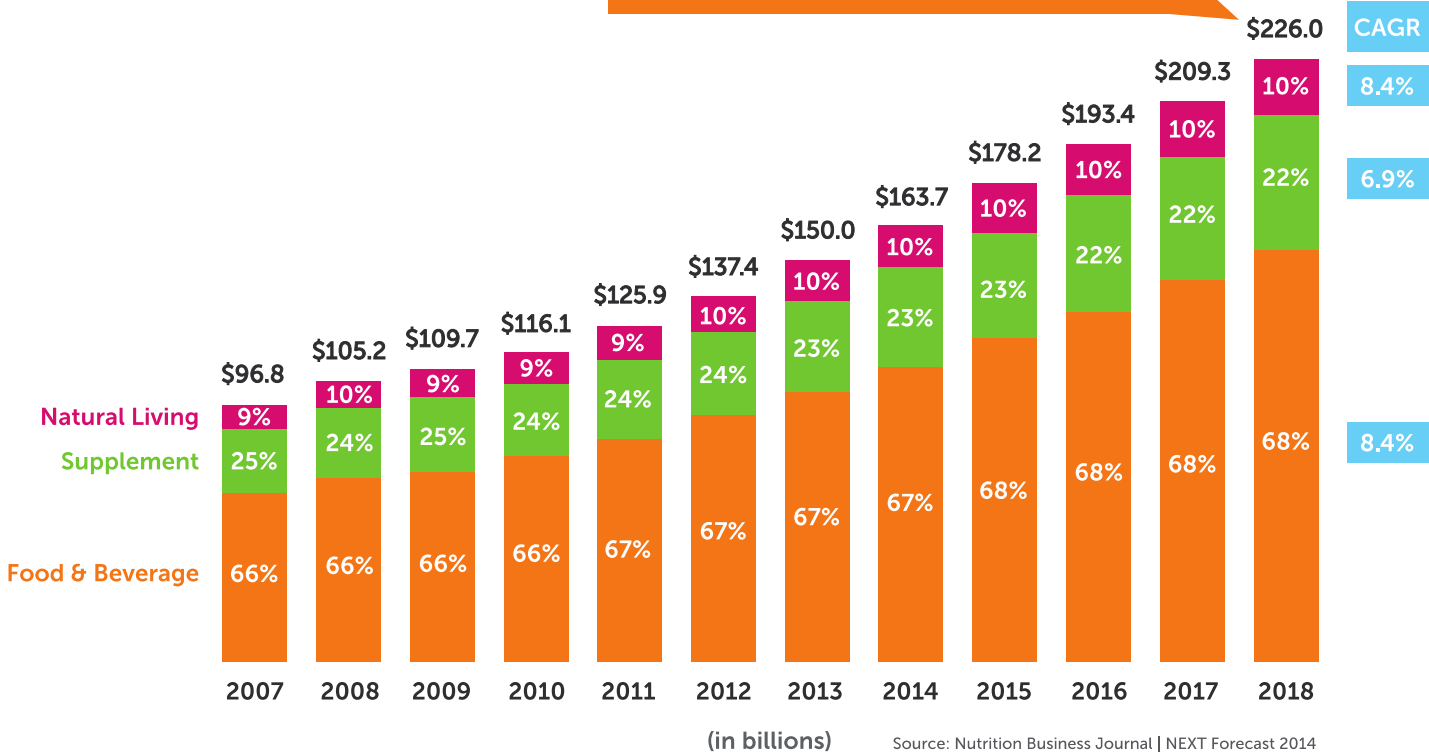
- Core competencies
- Enabling capabilities
- New Hope properties



The U.S. Natural Products market is gaining scale, and is expected to grow 8.1% annually.

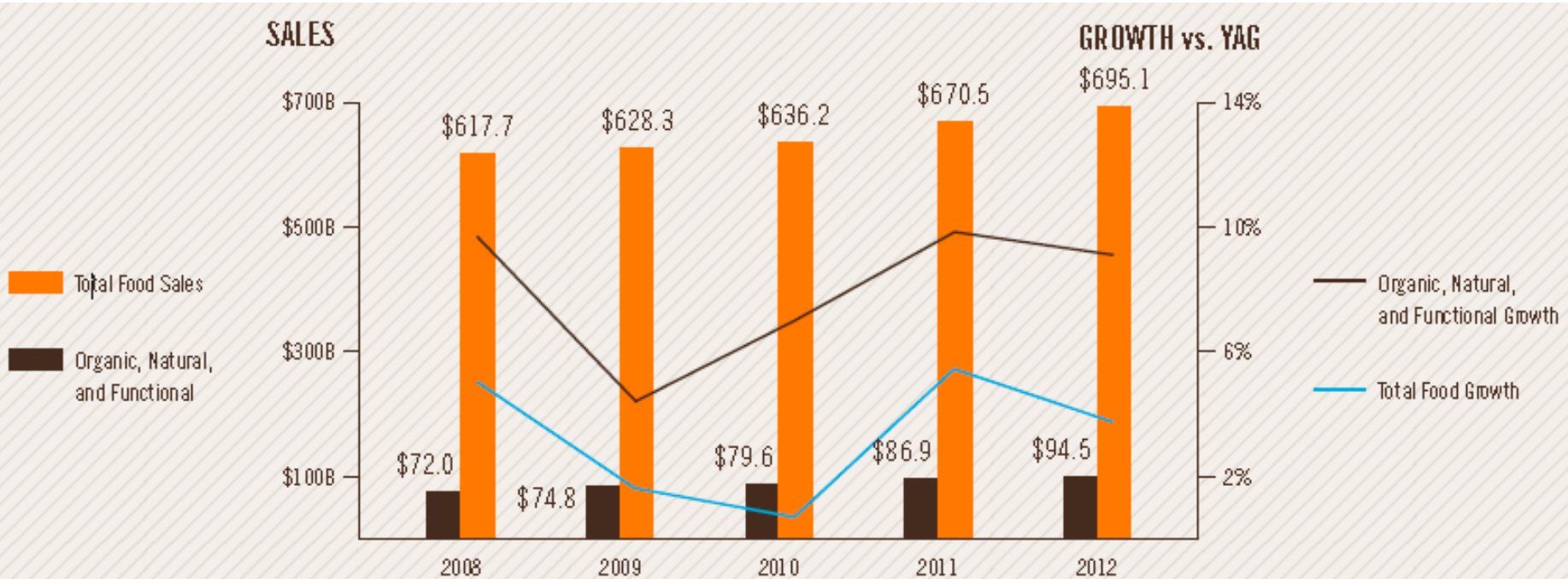
Projected U.S. Sales of Natural Products

2.5x the growth of mainstream packaged goods



Source: Nutrition Business Journal | NEXT Forecast 2014

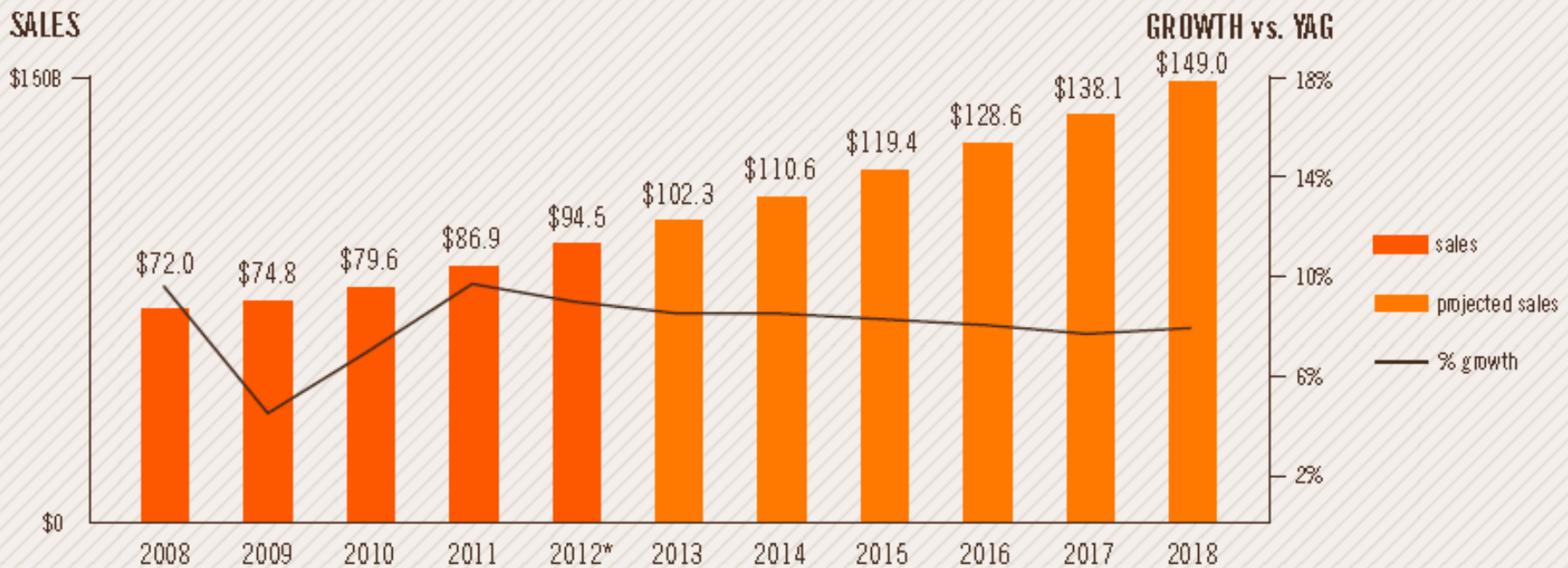
U.S. natural, organic & functional food is outpacing total food sales growth.



U.S. Natural, Organic, and Functional Sales vs. Total Food Sales: 2008-2012

Source: Nutrition Business Journal | NEXT Forecast 2014

Natural, organic & functional food sales are forecasted to hit nearly \$150B by 2018.



U.S. Natural, Organic, and Functional Sales and Growth: 2008-2012 | Forecast through 2018

Source: Nutrition Business Journal | NEXT Forecast 2014

NEXT Forecast

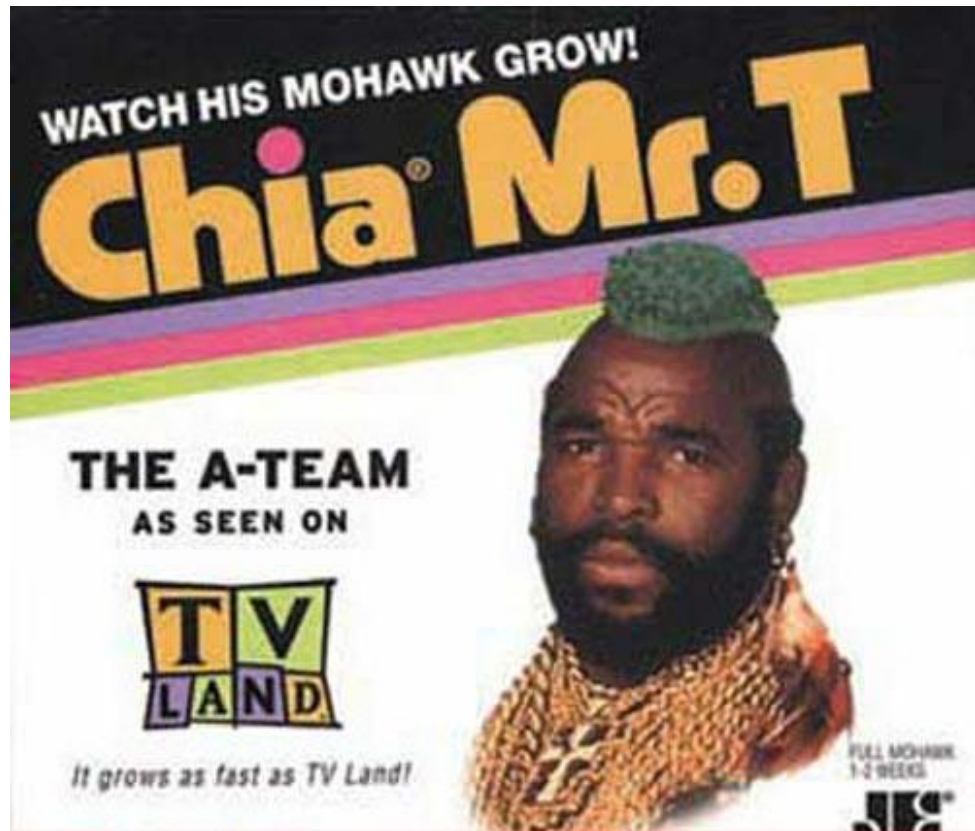
Macro Market Forces
And the Trends
They Drive



Ancient Wisdom

Our food future looks a lot like our past, but real success requires reverting in forward-thinking ways.

This is not what we
mean by ancient
wisdom...



... but Ancient Wisdom is all about getting back to the basics with simple, clean ingredients.



Chia
Mamma Chia

649



Hemp
Nature's Path

322



Apple cider vinegar
Fire Cider

419



Chickpeas
Banza

375

Ancient Wisdom is fueling (and blurring) the vegan, paleo and raw food movements.



Vegan
Perfect Bar



Paleo
Gemini Tigernuts



Raw
RawFoodz

Sophisticated flavors and customizable offerings give Ancient Wisdom a fresh twist.



I heart keenwah
Herbes de Provence
Quinoa Puffs



Tava
Green Chile Ghee



Back to the Roots
Heritage grains +
breakfast toppers

Transcendent Transparency

“In a world where nothing can be hidden,
you’d better have nothing to hide.”

Greg Page, CEO, Cargill

'Farm to fork' comes alive in packaged foods.



Wick-en-heiser Organic Farms
HAYS, ALBERTA

INGREDIENT TRACKER

You can see the source of every ingredient in our products. Just enter the code from the package in the boxes below.

TRACK IT!

[See an example](#)



Product certifications are one way to deliver transparency and trust.



USDA Organic
ams.usda.gov/nop



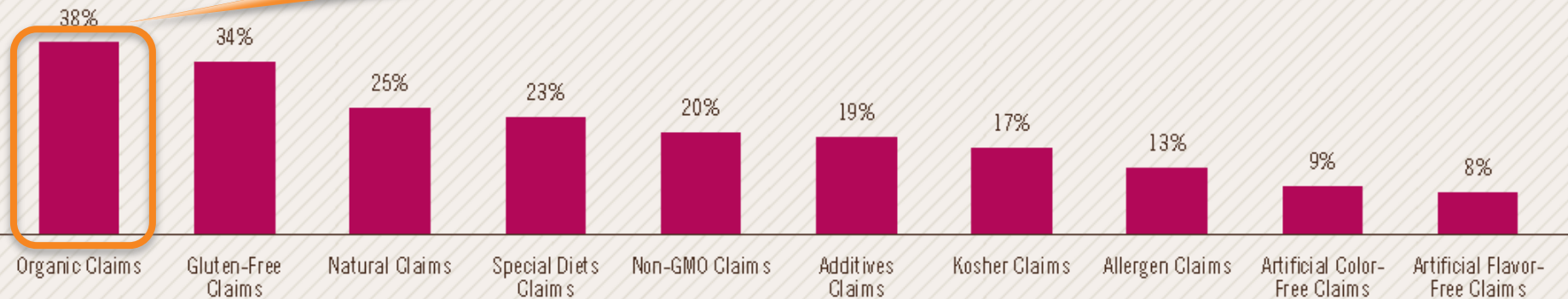
Non-GMO Project
nongmoproject.org



Fairtrade
International
fairtrade.net

Organic remains top claim/certification in products launched at Natural Products Expo

38% of products carry Organic label



Top 10 Marketing Claims and Labels

Source: New Hope Natural Media's NEXT Trend Database.

Providing traceability delivers

Quinn popcorn



Quinn Popcorn
Farm to Bag



Three Twins
Local Sourcing



Askinosie
Chocolate
Producer
Storytelling

meet your herbs
Introducing Meet Your Herbs,™ our industry-first traceability program.

step 1	step 2	step 3
Find the Meet Your Herbs ID number on the back of any Gaia Herbs product.	Enter your ID number at gaiaherbs.com or in our new mobile app.	All traceable aspects of the herb's cultivation, harvesting, extraction, and validation will be displayed.

Gaia Herbs
Ingredient
Traceability

Growing demand for allergen-free and special diet foods makes label transparency critical.



Tolerant Foods
One Ingredient



Upfront Foods
Front-of-Pack
Labeling



Source Organic
Multiple
Certifications

The protein boom is creating a need for more transparency.



Lenny & Larry's Complete Cookie

16 grams protein
(but 350 calories,
50 grams carbs)



Tru Table Protein Dip
10 grams protein



Powerful Yogurt 25 grams protein

The Value(s) Shopper

Consumers are moving beyond price as their single purchasing filter, and a whole new world of values and complexities now affect buying decisions.

Connecting with mission-oriented shoppers...



A PEACE CORPS VOLUNTEER HAD A DREAM TO USE THE NUTRITIOUS LEAVES OF THE MORINGA TREE TO IMPROVE THE LIVES OF WOMEN IN WEST AFRICA. OUT OF THAT DREAM, KULI KULI WAS BORN.



Value(s) shoppers care about the mission, causes and supply chains behind products.



Soapbox Soaps
Buy One Give One



Harmless Harvest
Sustainable Supply

OLOMOMO
B Corp



Dr. Bronner's
Advocacy

Convenience and nutrition can also trump price

Boulder Organic Heat & Serve Soup



Healthier Turmeric Brown Rice



Yumbutter Superfood Butters



Epic Bison Jerky Bites



Suja Juice Cold-Pressed Juice



Thank you!



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