

# Organic Dairy and the Role of Pasture

**Dairy Symposium**

**Presented by:**

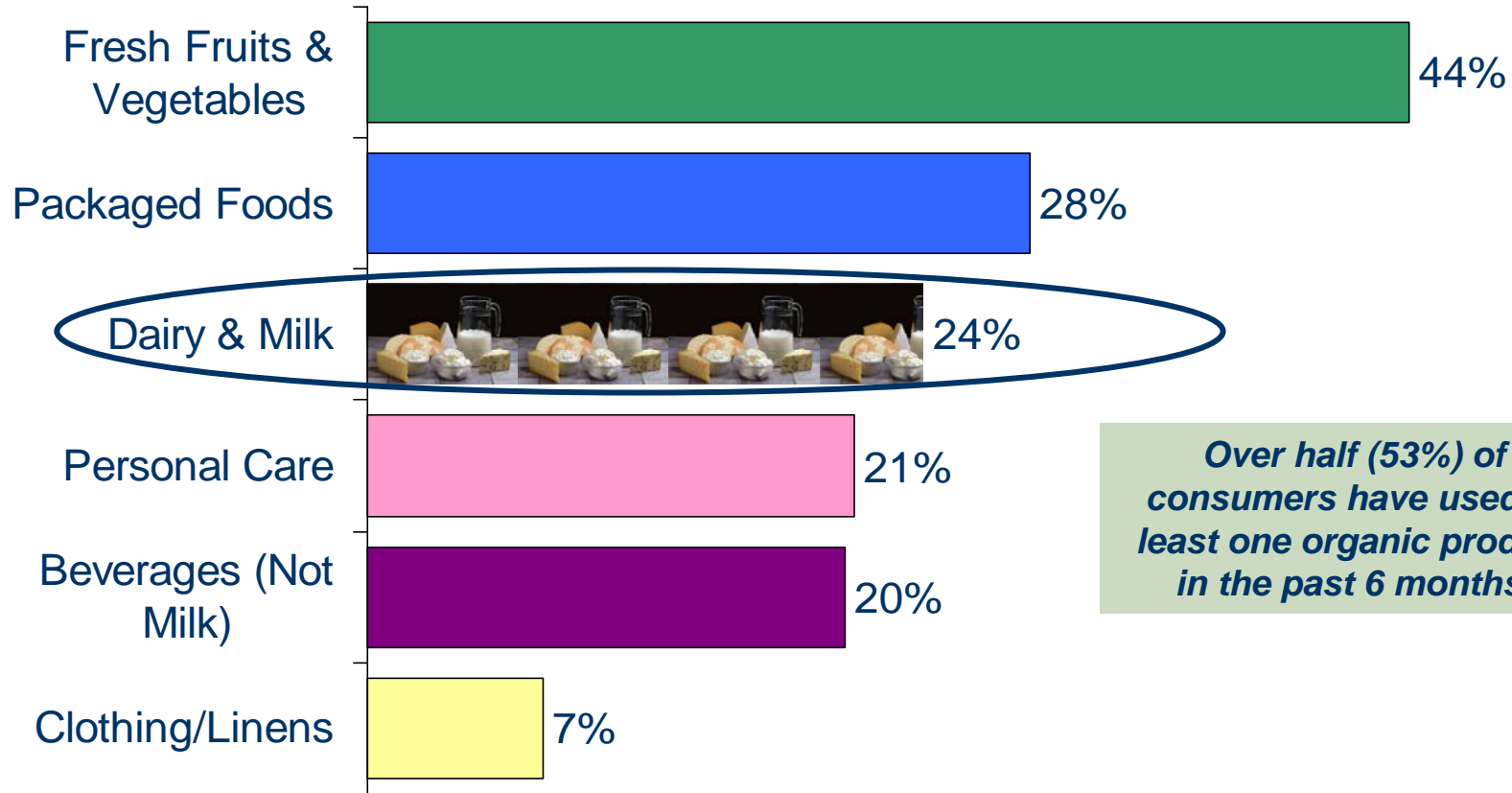
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The Natural Marketing Institute (NMI)  
April 18, 2006





# Almost One-Fourth of US Adults Have Used Organic Dairy in Past 6 Months

(Q2 – % GP stating usage of the following products over the past 6 months)



**Over half (53%) of consumers have used at least one organic product in the past 6 months.**



# Organic Dairy Users Are High Users Of Other Categories

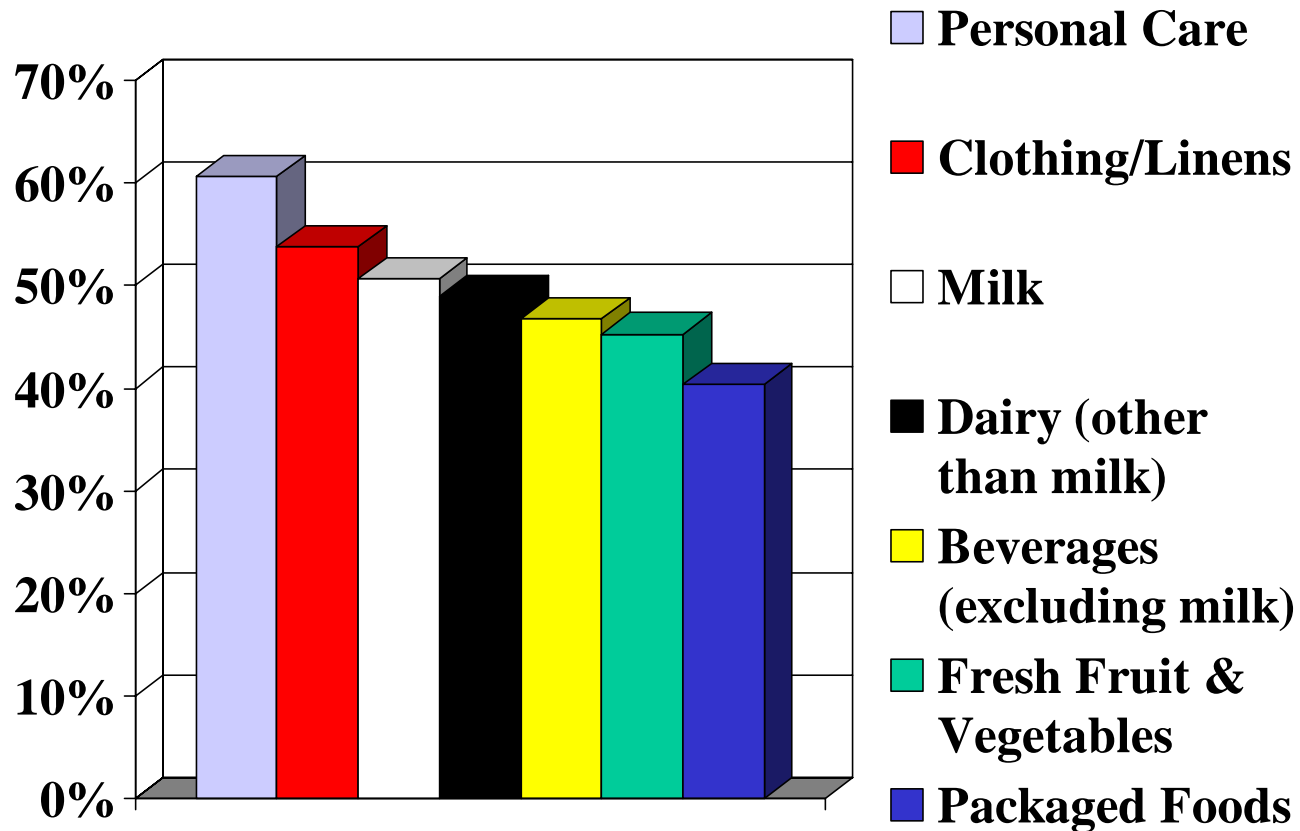
(Q2 – % consumer segment stating usage of the following products over the past 6 months)

Organic Products ↓	GP %	Users of Organic...						
		Fresh Fruits/ Veg. %	Packaged Foods %	Beverages (Not Milk) %	Dairy (Not Milk) %	Milk (%)	Personal Care (%)	Clothing/ Linen (%)
Fresh Fruits/Veg.	44	100	88	89	88	89	82	90
Packaged Foods	28	57	100	80	75	77	64	77
Beverages (Not Milk)	20	41	58	100	65	66	49	62
Dairy (Not Milk)	19	38	51	61	100	74	49	59
Milk	18	36	48	57	69	100	46	61
Personal Care	21	38	47	50	53	53	100	78
Clothing/Linen	7	15	20	23	23	25	28	100



# Almost Half of All Organic Dairy Users, Use More Than Once Per Week

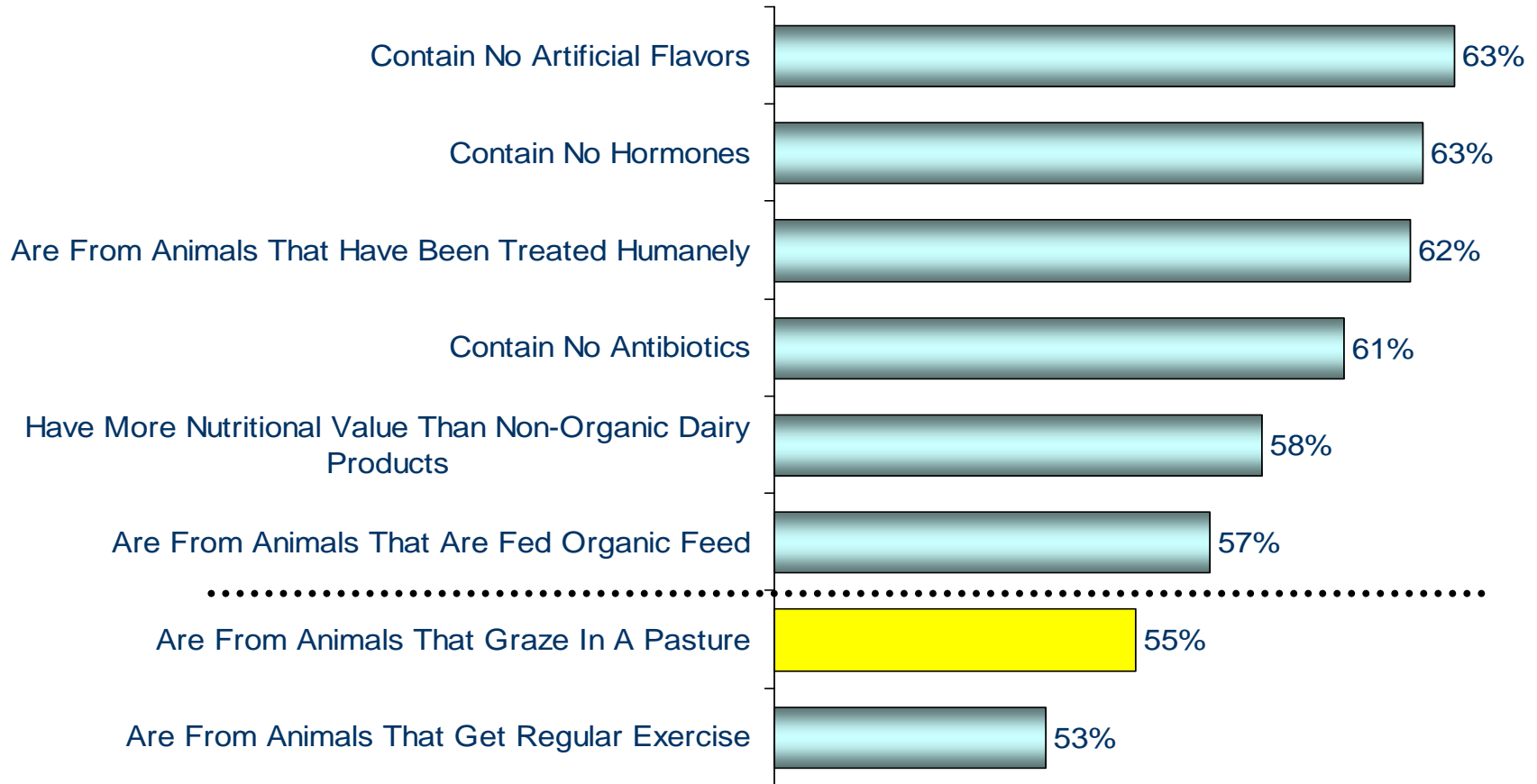
*(Q3 – % of users of each category who use more than once per week)*





# General Public - Attitudes About Organic Dairy & Milk Products

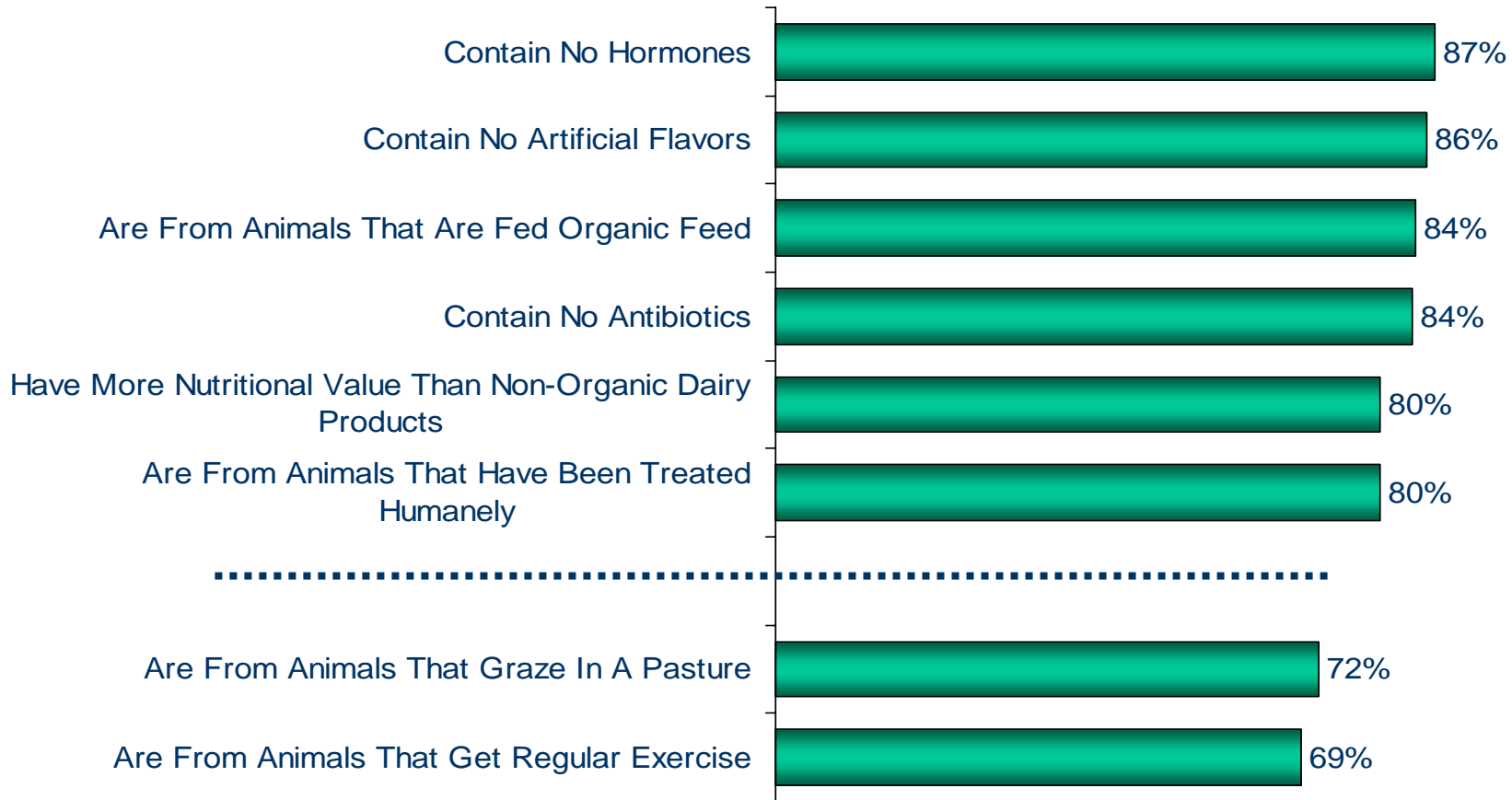
(Q4 - % GP indicating that it is "extremely/somewhat" important for organic dairy products including organic milk...)





# While Grazing Is Important – Most Other Attributes Are Significantly More Important

(Q4 - % **organic dairy users** indicating that it is “extremely/somewhat” important for organic dairy products including organic milk...)



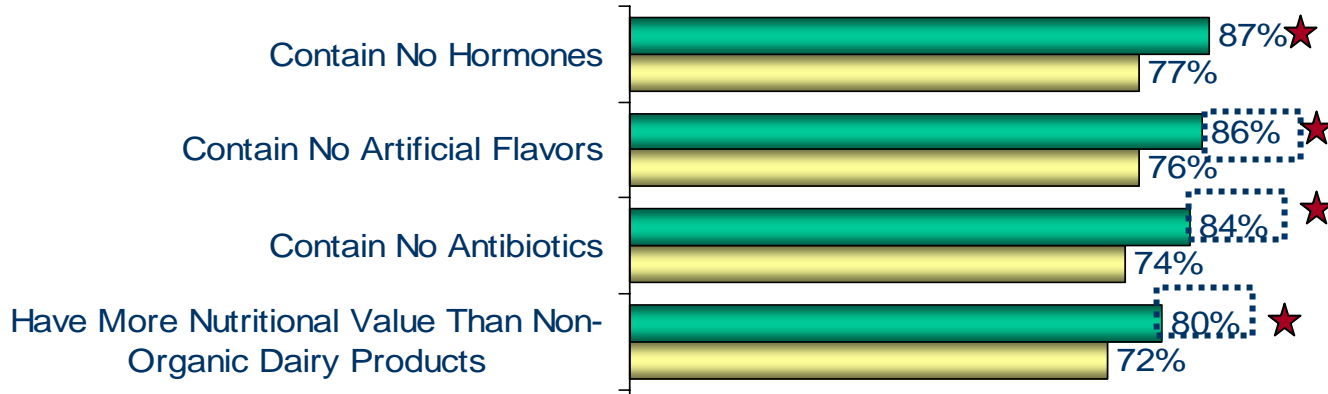
**Organic Dairy Users** = Those who have used organic milk and/or dairy in the past 6 months



# In General, Harmful Ingredients Are of More Concern

(Q4 - % consumer segment indicating that it is "extremely/somewhat" important for organic dairy products including organic milk...)

## Harmful Ingredients & Nutritional Value



**Organic Dairy Users =** Those who have used organic milk and/or dairy in the past 6 months

## Treatment of Animals



**Organic Non-Dairy Users =** Those who have used other organic products in the past 6 months but not milk or dairy.



= between groups, significance at the 95% confidence level

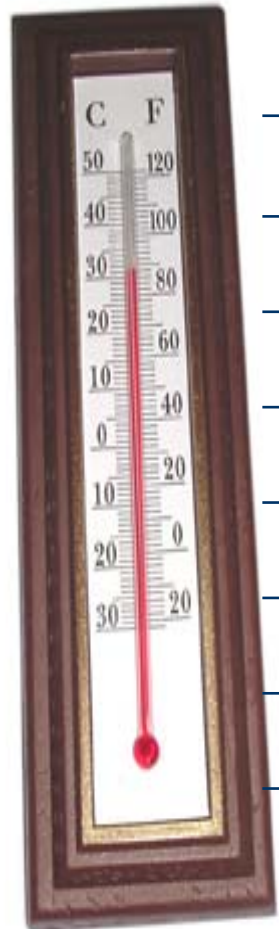


= within Organic Dairy Users, significance at the 95% confidence level

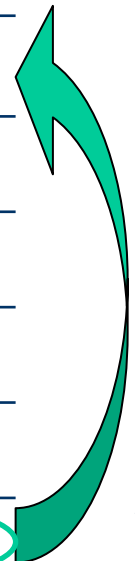


# No Antibiotics and Organic Feed Strongest Predictors of Frequent Organic Milk/Dairy Use

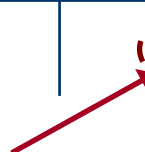
## Classification And Regression Tree Analysis



Attribute	Relative Importance Score
Contain no antibiotics	100
Are from animals that are fed organic feed	98.4
Contain no hormones	83.7
Are from animals that graze in a pasture	83.3
Contain no artificial flavors, colors, or preservatives	74.2
Are from animals that have been treated humanely	43.4
Have more nutritional value than non-organic dairy products	37.7
Are from animals that get regular exercise	10.9



Half as important as antibiotics & feed



Relatively speaking, very low on consumer radar





# Daily and Heavy Users More Likely to Consider Grazing Important

(Q4 - % consumer segment indicating that it is “extremely/somewhat” important for organic dairy products including organic milk...)

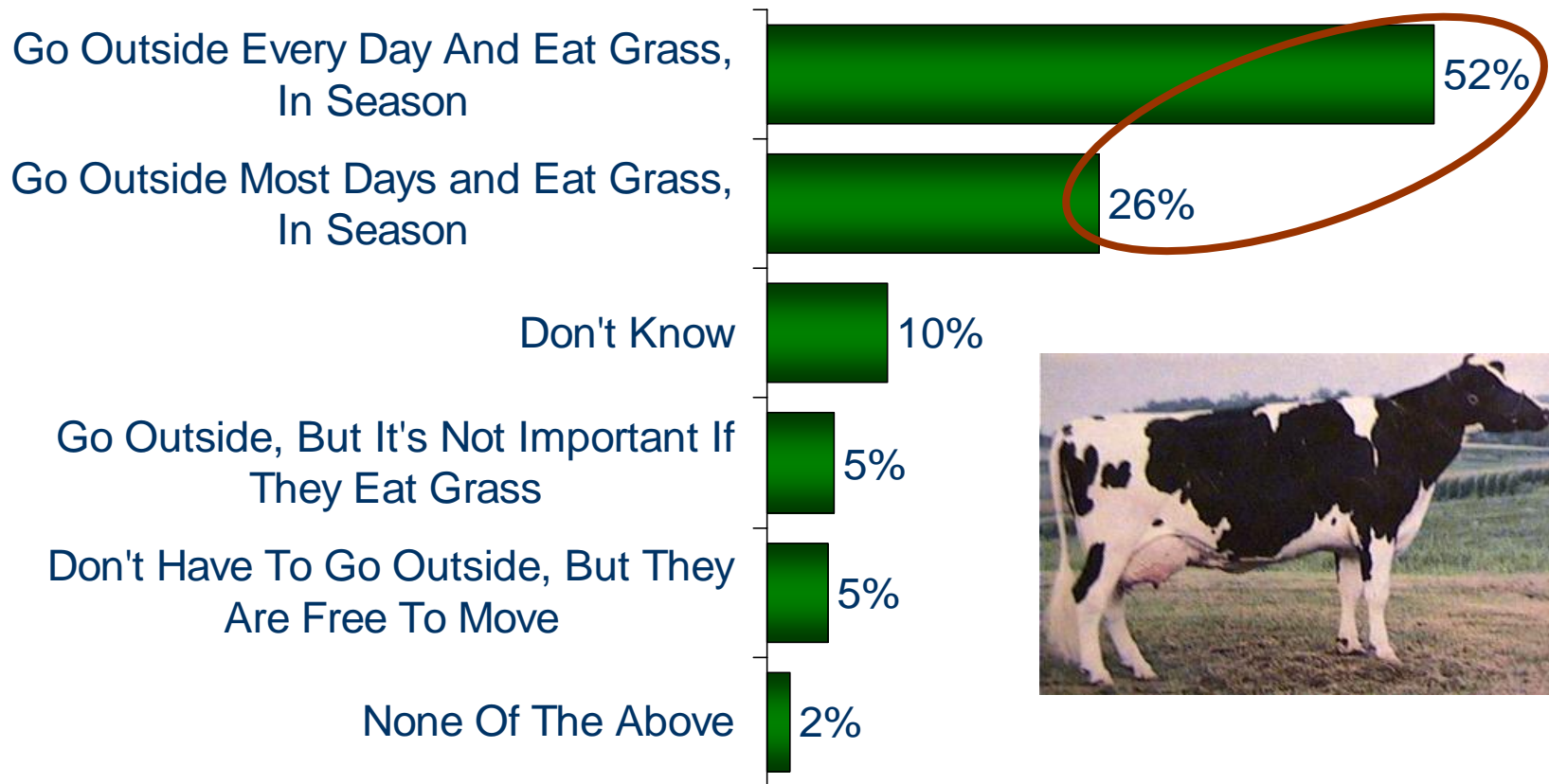
		Organic Dairy Usage		
		Daily = once a day or more (B) %	Heavy = 1x per week or more than 1x per week (C) %	Light = Less than 1x per week (D) %
<b>Harmful Ingredients &amp; Nutritional Value</b>	Contain no antibiotics	84	89	79
	Contain no hormones	88	91	82
	Contain no artificial flavors, colors, or preservatives	93 <sup>D</sup>	85	80
	Have more nutritional value than non-organic dairy products	89 <sup>D</sup>	86 <sup>D</sup>	65
<b>Treatment of Animals</b>	Are from animals that have been treated humanely	81	88 <sup>D</sup>	70
	Are from animals that graze in a pasture	81 <sup>D</sup>	79 <sup>D</sup>	55
	Are from animals that are fed organic feed	87	90	76
	Are from animals that get regular exercise	73 <sup>D</sup>	85 <sup>D</sup>	51

A capital letter = significance at the 95% confidence level between groups



# Three Out of Four Who Believe in Grazing Think Cows Should Frequently Go Outside and Eat Grass

(Q5 – % of those who think it is extremely/somewhat important for animals to graze in a pasture, indicating what this means to them...)



*The ranking of these attitudes is consistent across groups, including Organic Dairy and Milk Users, and Frequent Organic Dairy and Milk Users.*

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