

Outlook on the consumption of organic products in Brazil

2019



**ORGANIC
BRASIL**

organis

Organic Promotion
Association



APAS* 2019 Research

46%

of consumers would like to find more **organic**, natural and healthy products at the supermarket shelves

Annual growth rate

20%

Productive units

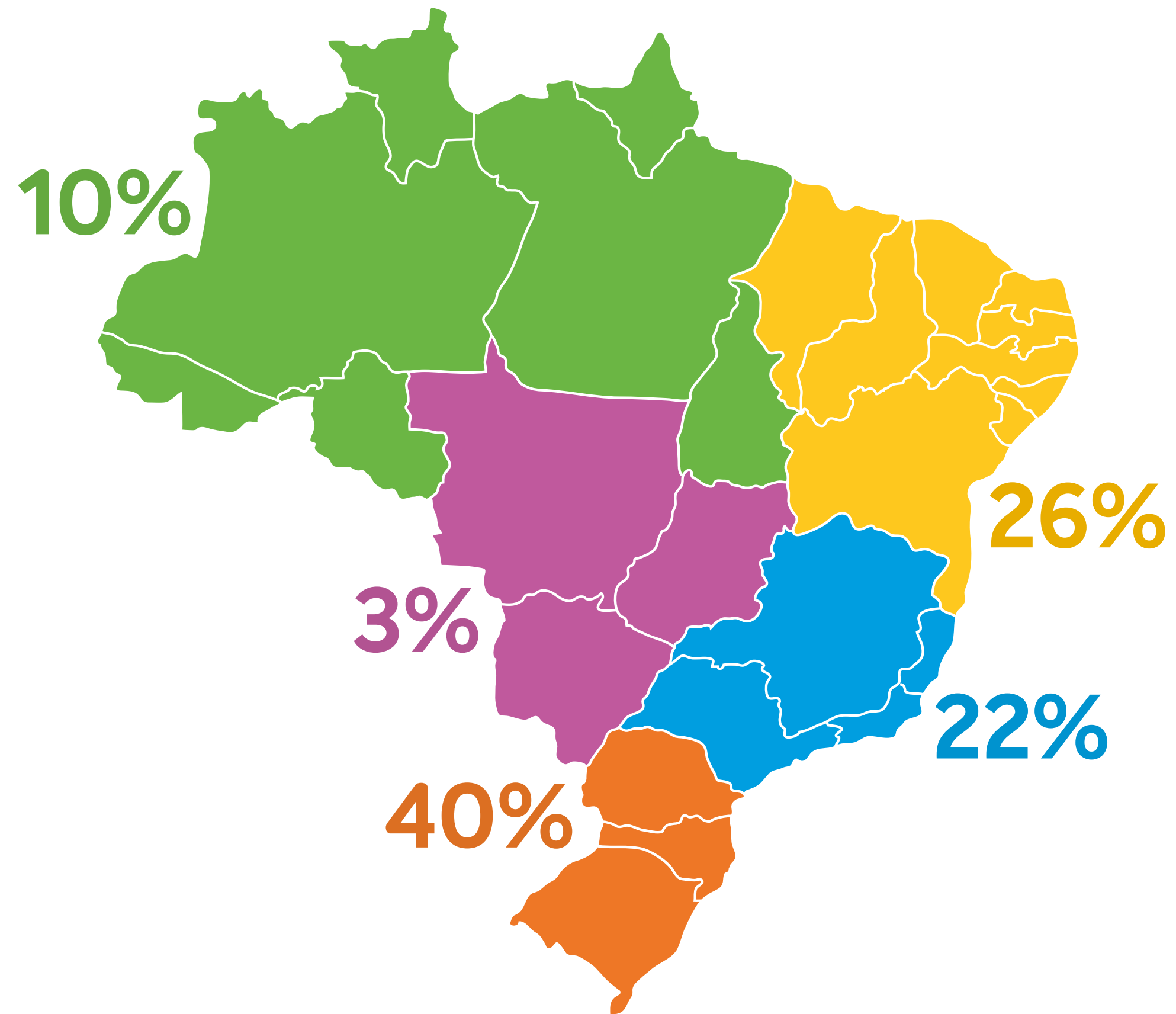
21142 march 2020

In 2016 were 12,769

+ 65%

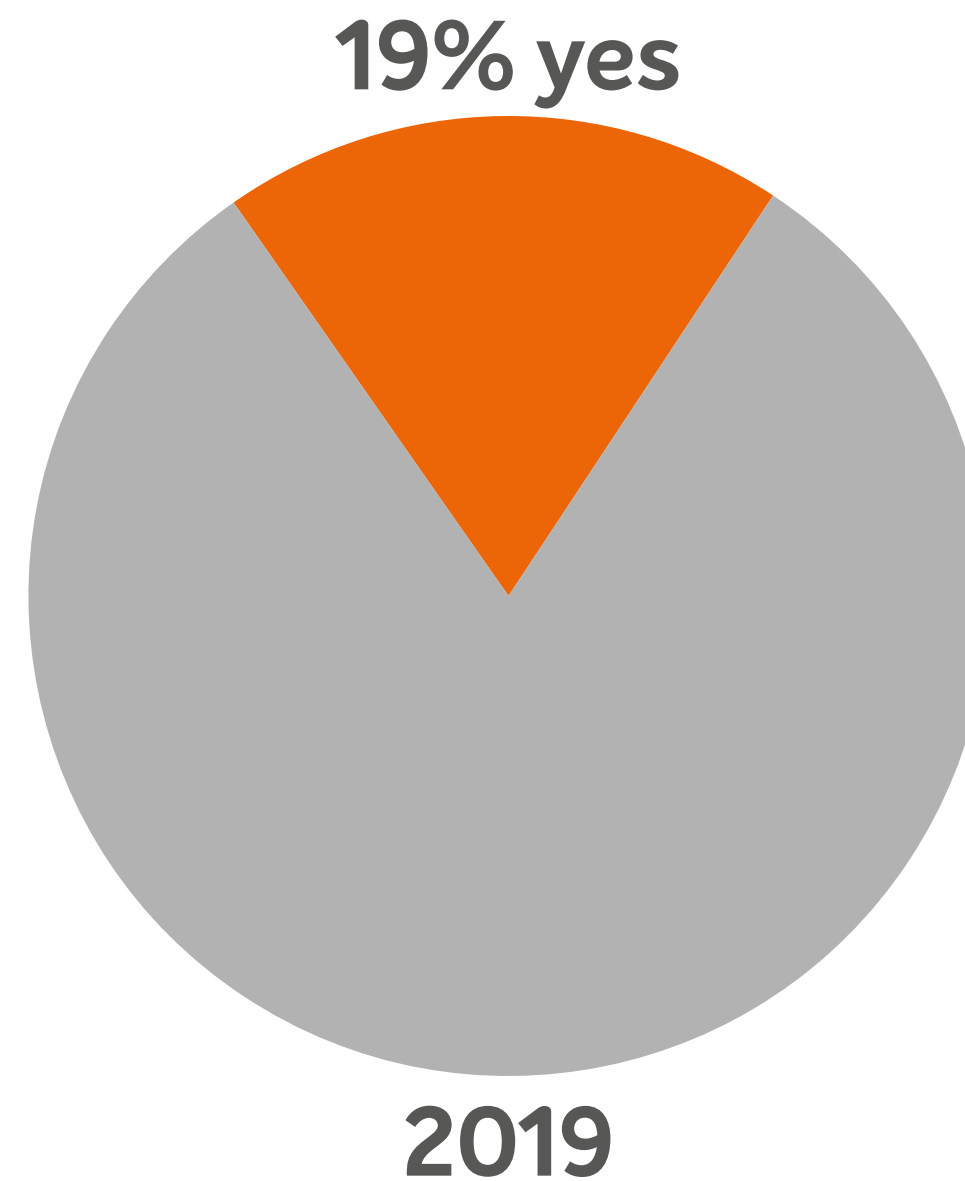
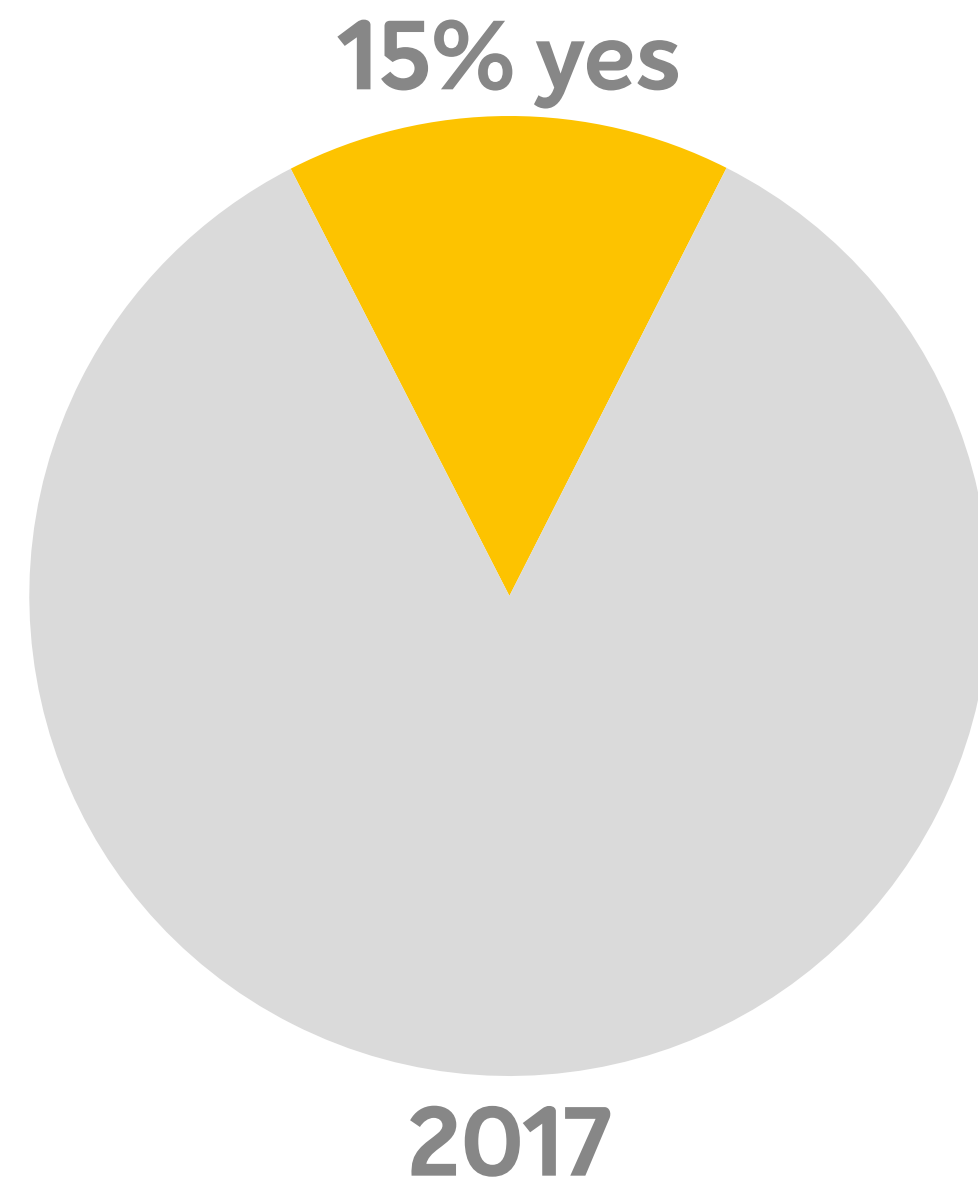
Productive units

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Organic products consumption

Consumed organic products in the last 30 days

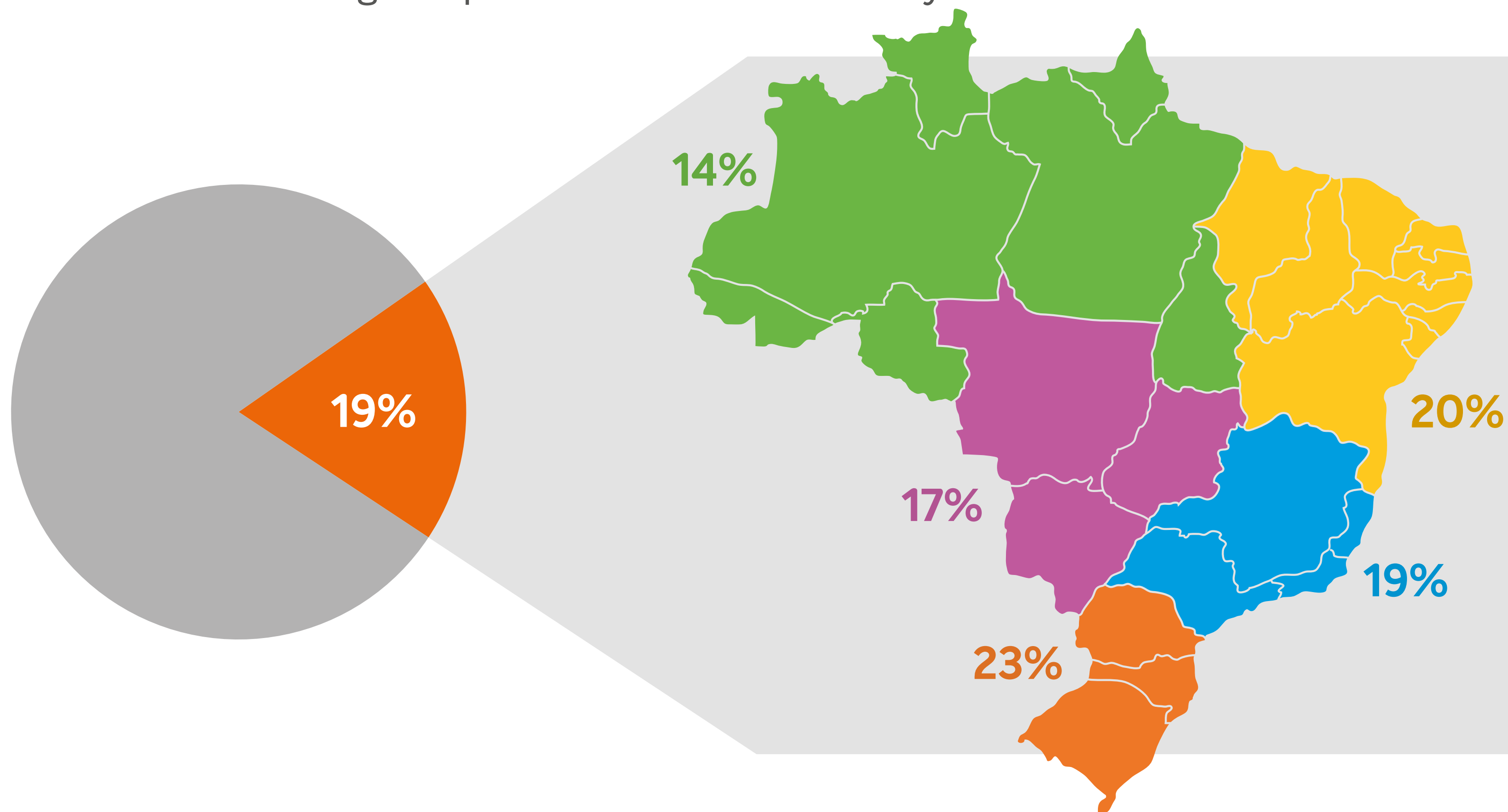


Highlight 2019

Without north area,
20% consumed any kind
of organic products in
the last 30 days.

Organic products consumption

Consumed organic products in the last 30 days – Per area

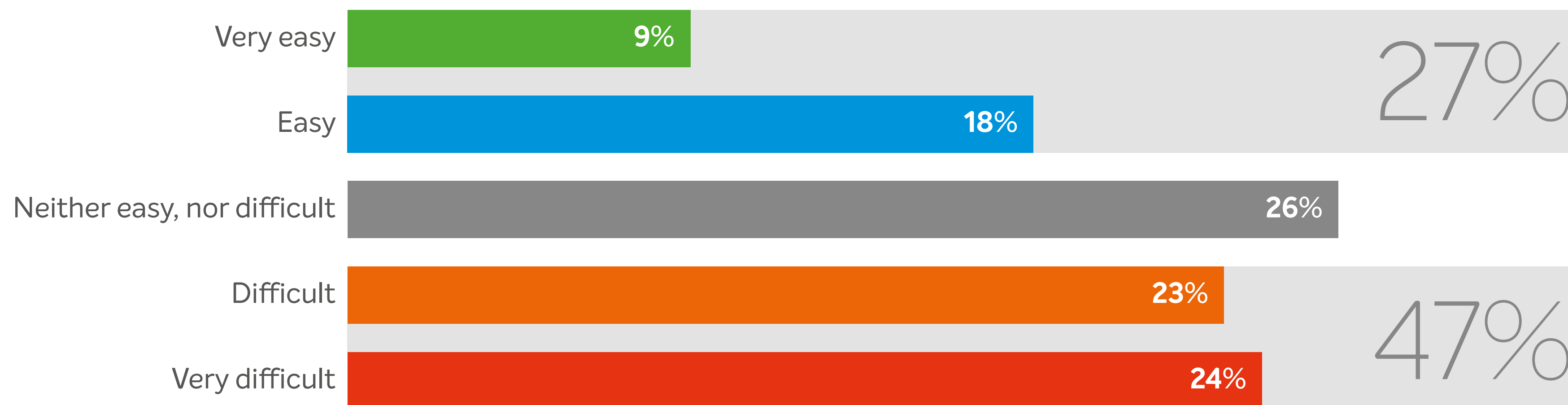


Basis: 1,027 interviewed

Question: Have you bought any organic products in the last 30 days?

Facility to find organic products in the area

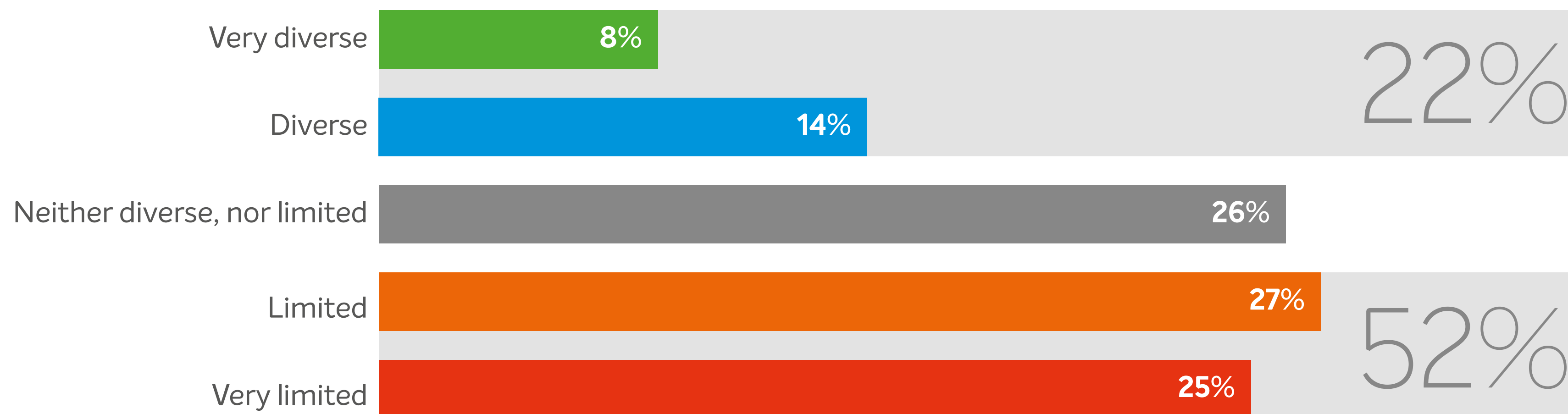
Stimulated



Basis: 1,027 interviewed
Question: How easy do you find organic products in you area?

Organic products diversity in your area

Stimulated



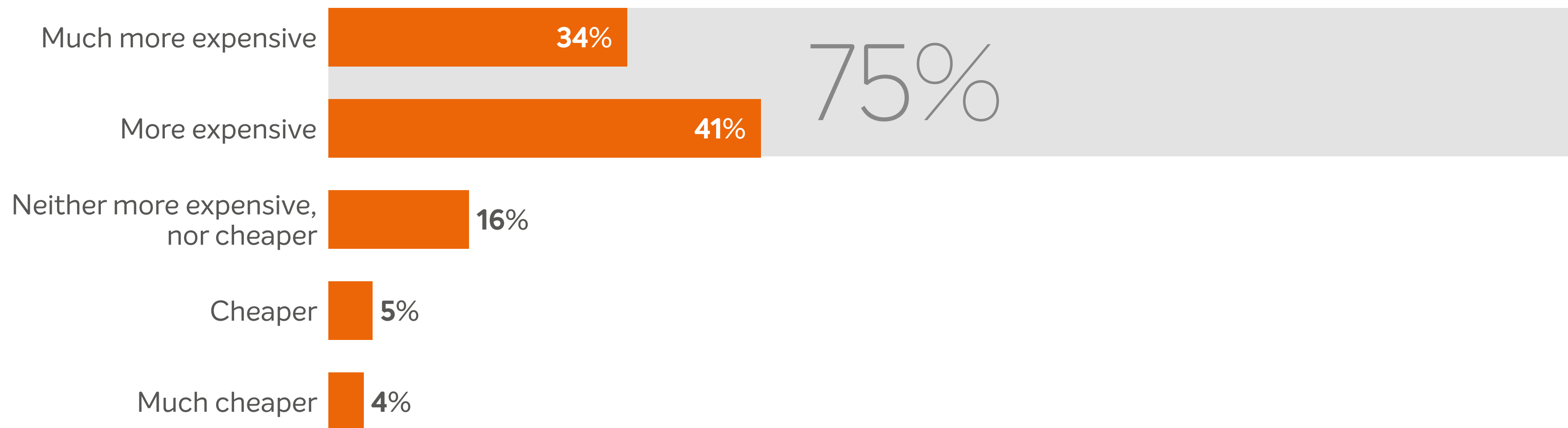
Basis: 1,027 interviewed

Question: What is the offer of organic products diversity in your area?

Evaluation of organic products prices

Stimulated

How do you rate the organic products prices compared to non organic products?

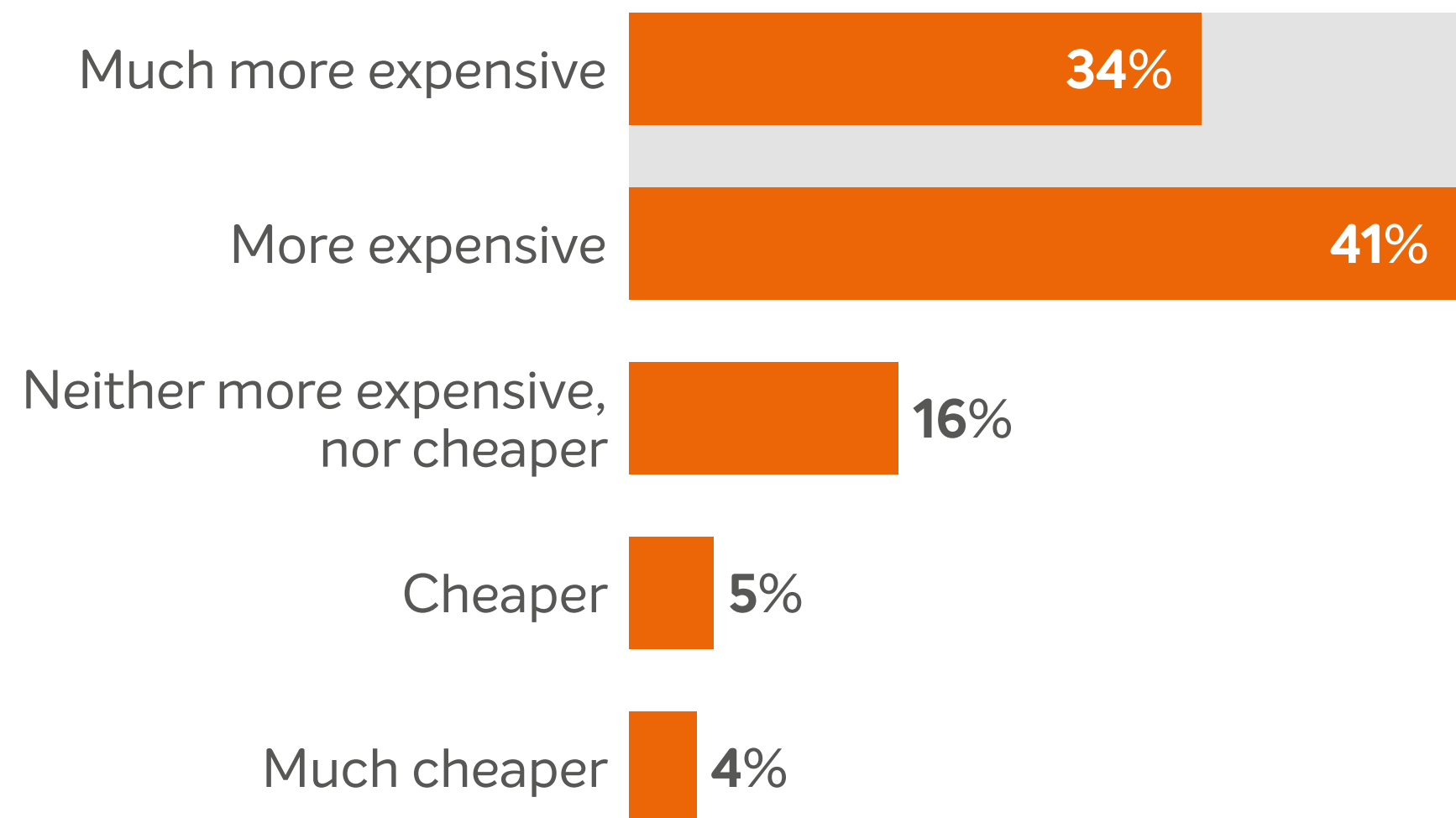


Basis: 1,027 interviewed | **Question:** In a scale of 1 to 5, where 1 means much cheaper and 5 much more expensive, how do you rate the organic products prices compared to non organic products?

Evaluation of organic products prices

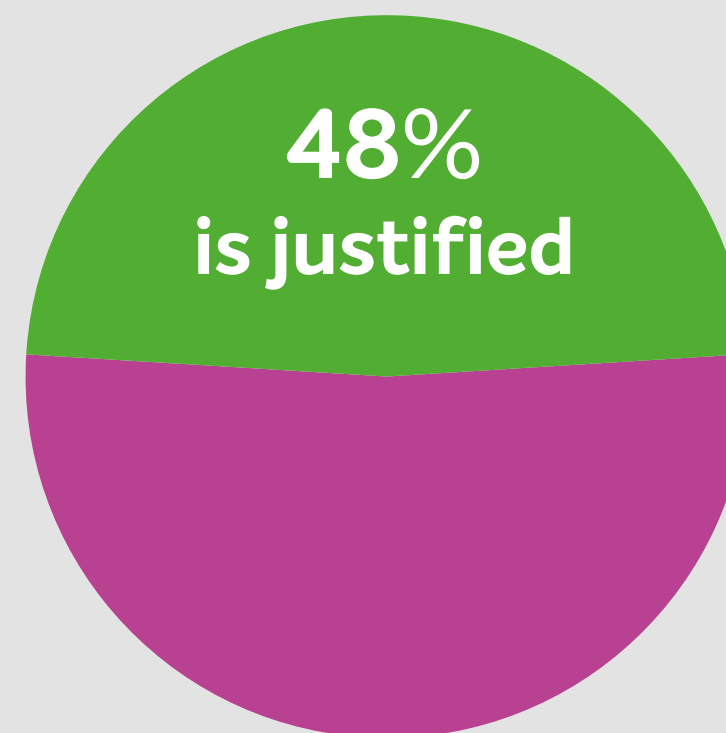
Stimulated

How do you rate the organic products prices compared to non organic products?



75%

Do you believe that this difference is justified?

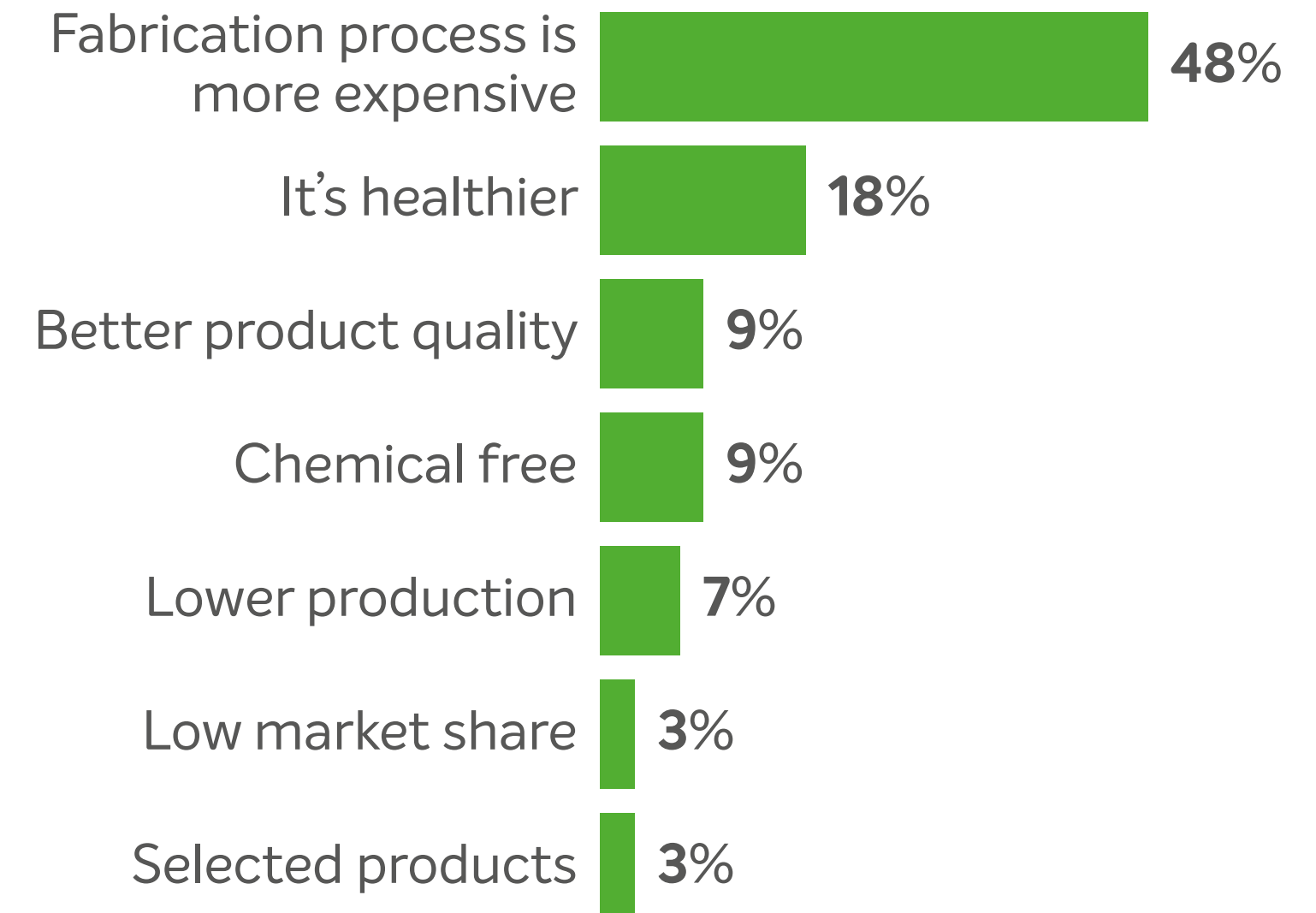
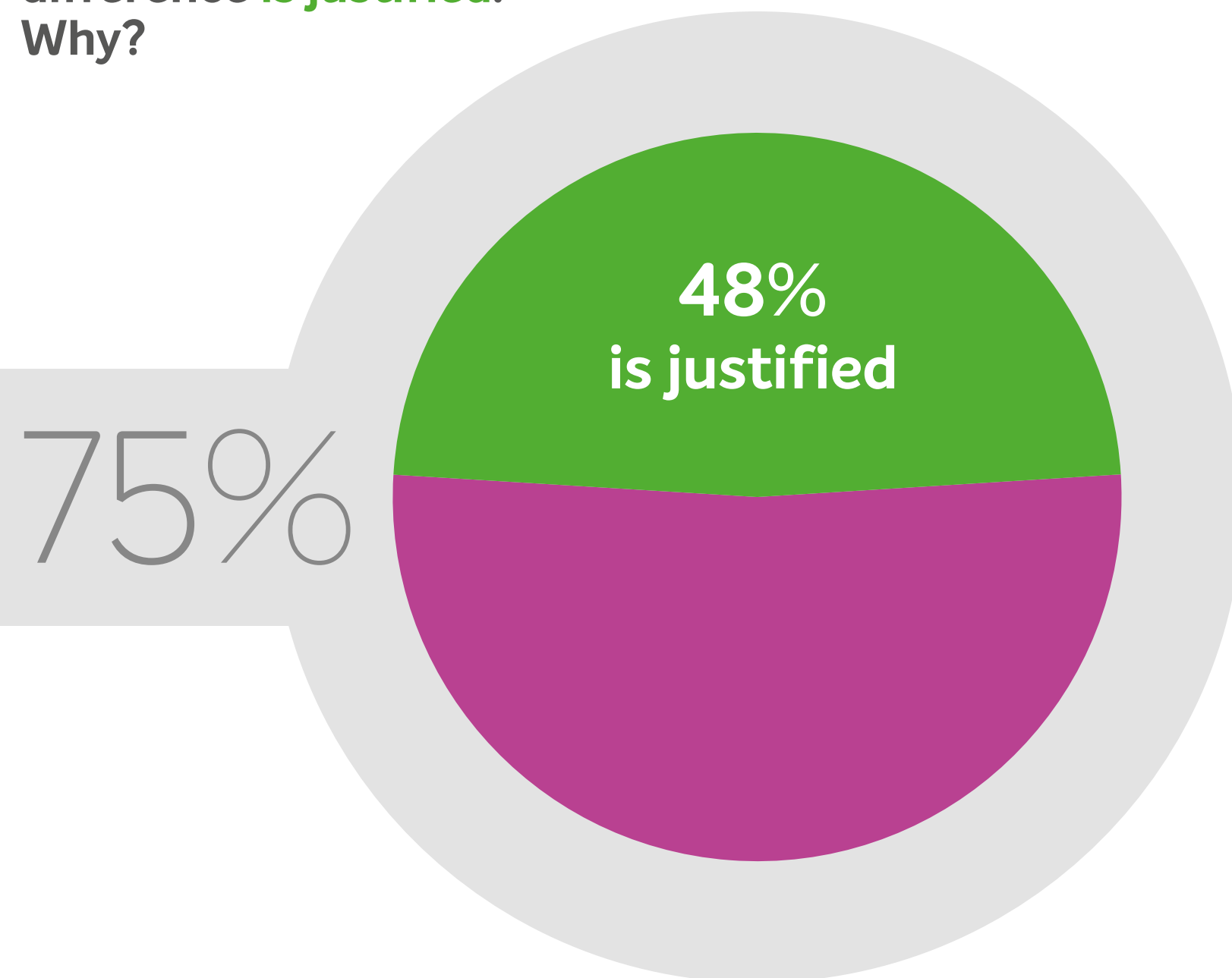


Basis: 1,027 interviewed | **Question:** In a scale of 1 to 5, where 1 means much cheaper and 5 much more expensive, how do you rate the organic products prices compared to non organic products? Do you believe that the difference in organic products prices is justified?

Organic products prices perception

MR – Spontaneous – Amongst the 75% who consider organic products much more expensive or more expensive

48% believes that the organic products price difference **is justified**.
Why?



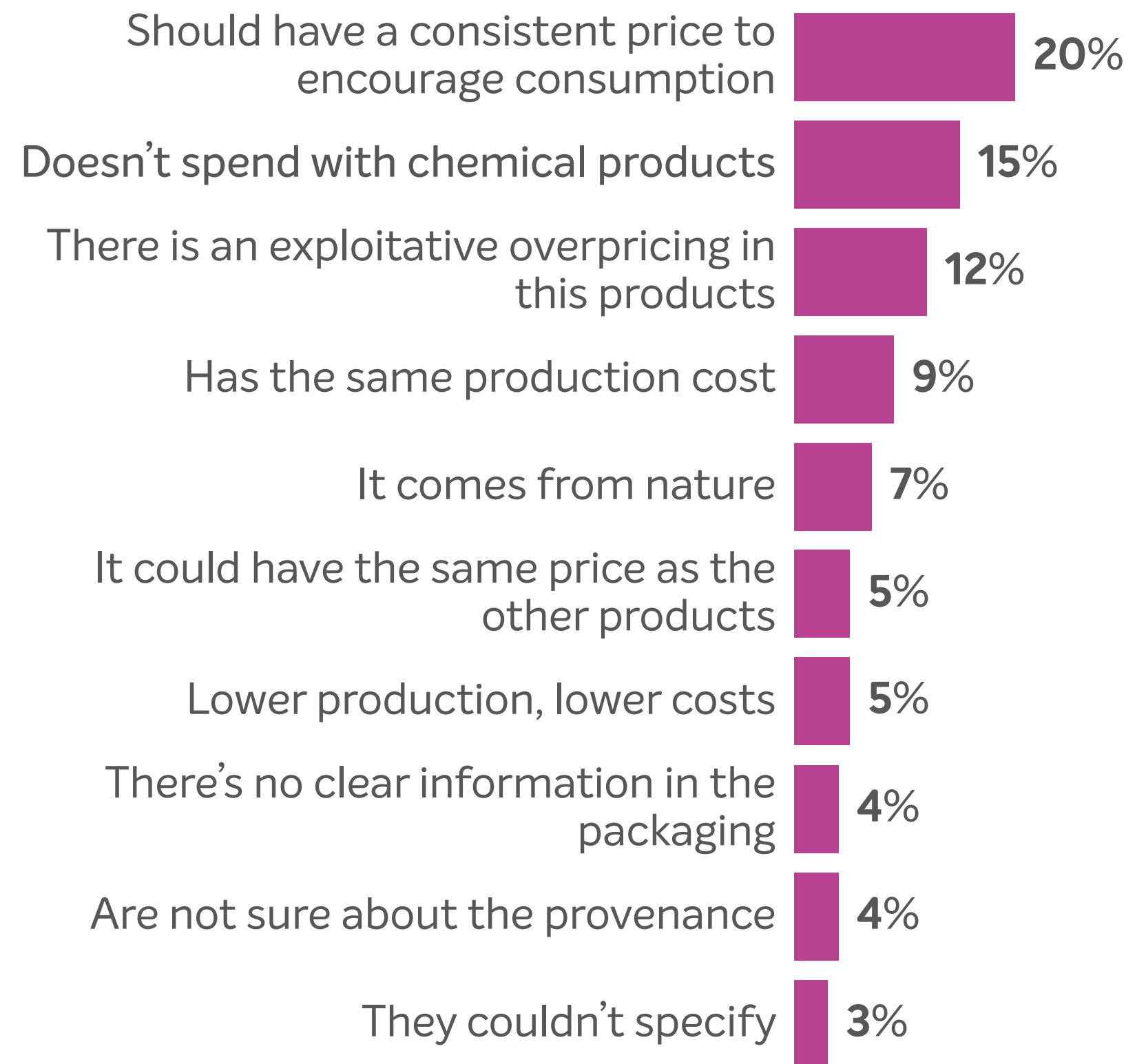
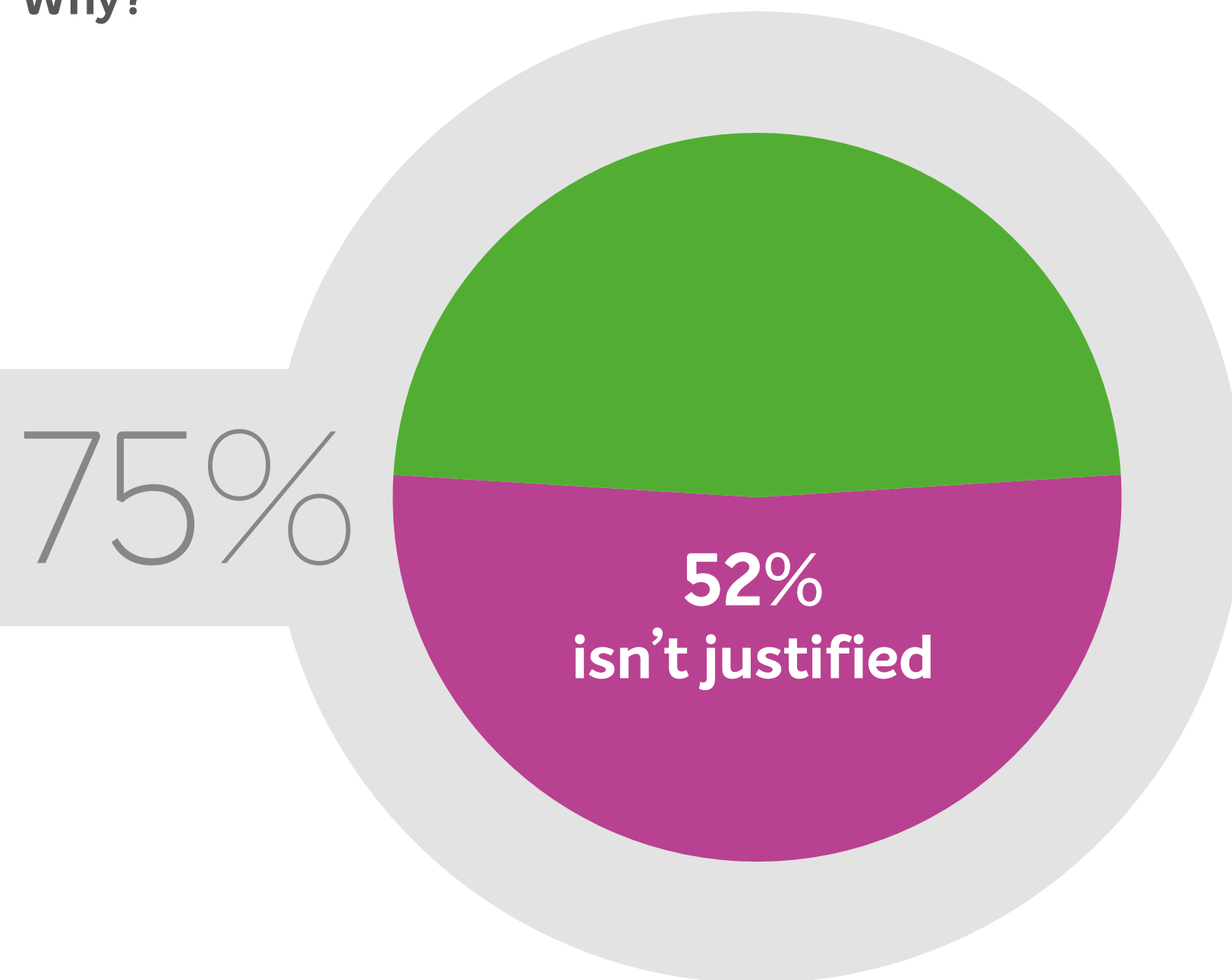
Basis: 370 people considers that organic products are much more expensive or more expensive and also believe that the difference is justified.

Question: Do you believe that the difference in organic products prices is justified?

Perception of organic products' pricing

MR – Spontaneous – Amongst the 75% who consider organic products much more expensive or more expensive

48% believes that the organic products price difference **isn't justified**.
Why?



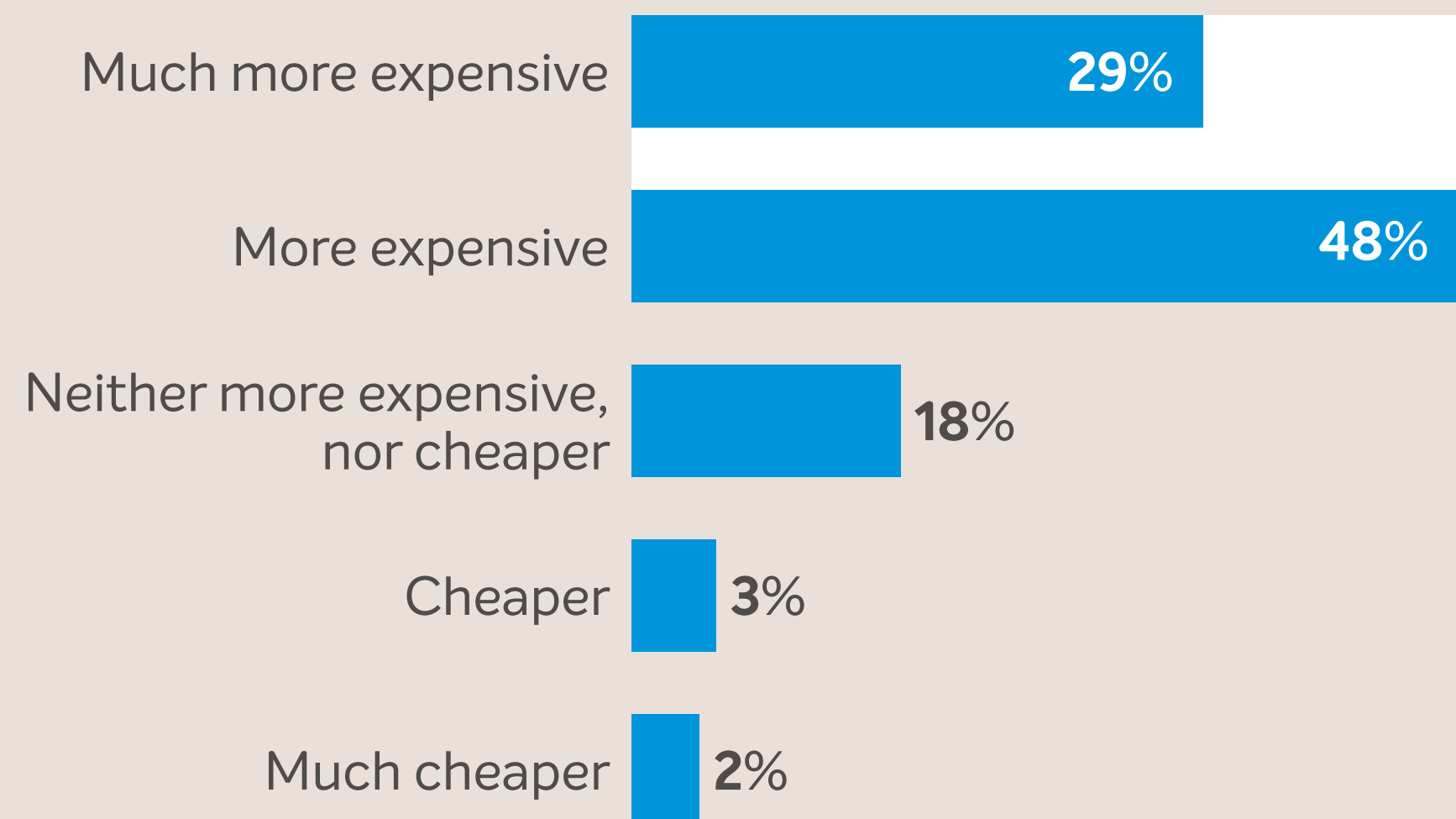
Basis: 400 people considers that organic products are much more expensive or more expensive and also believe that the difference isn't justified.

Question: Do you believe that the difference in organic products prices is justified?

Organic products pricing

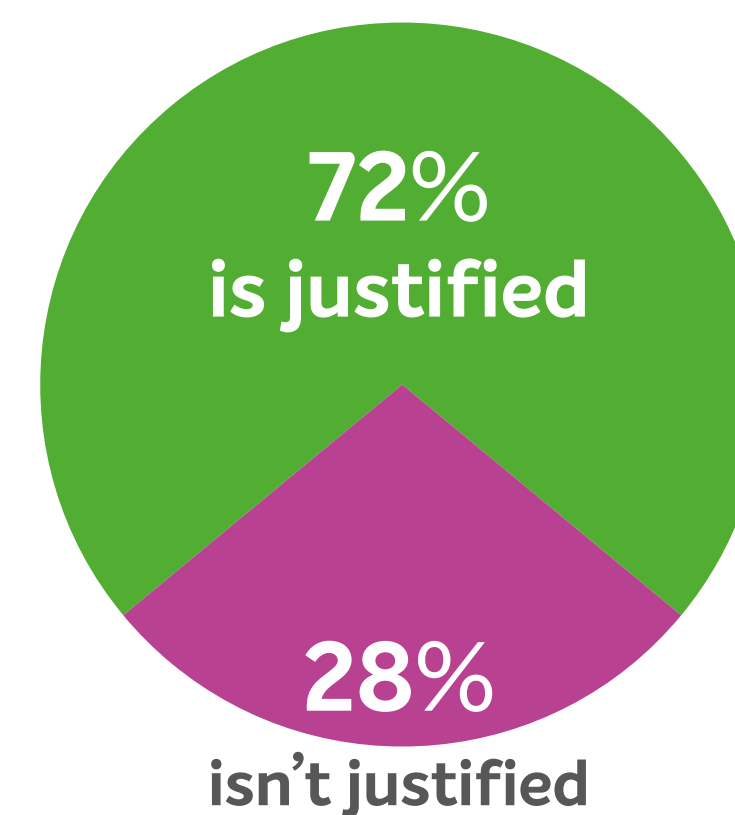
Stimulated

How do you rate the organic products prices compared to non organic products?



77%

Believes that the difference in organic products prices is justified

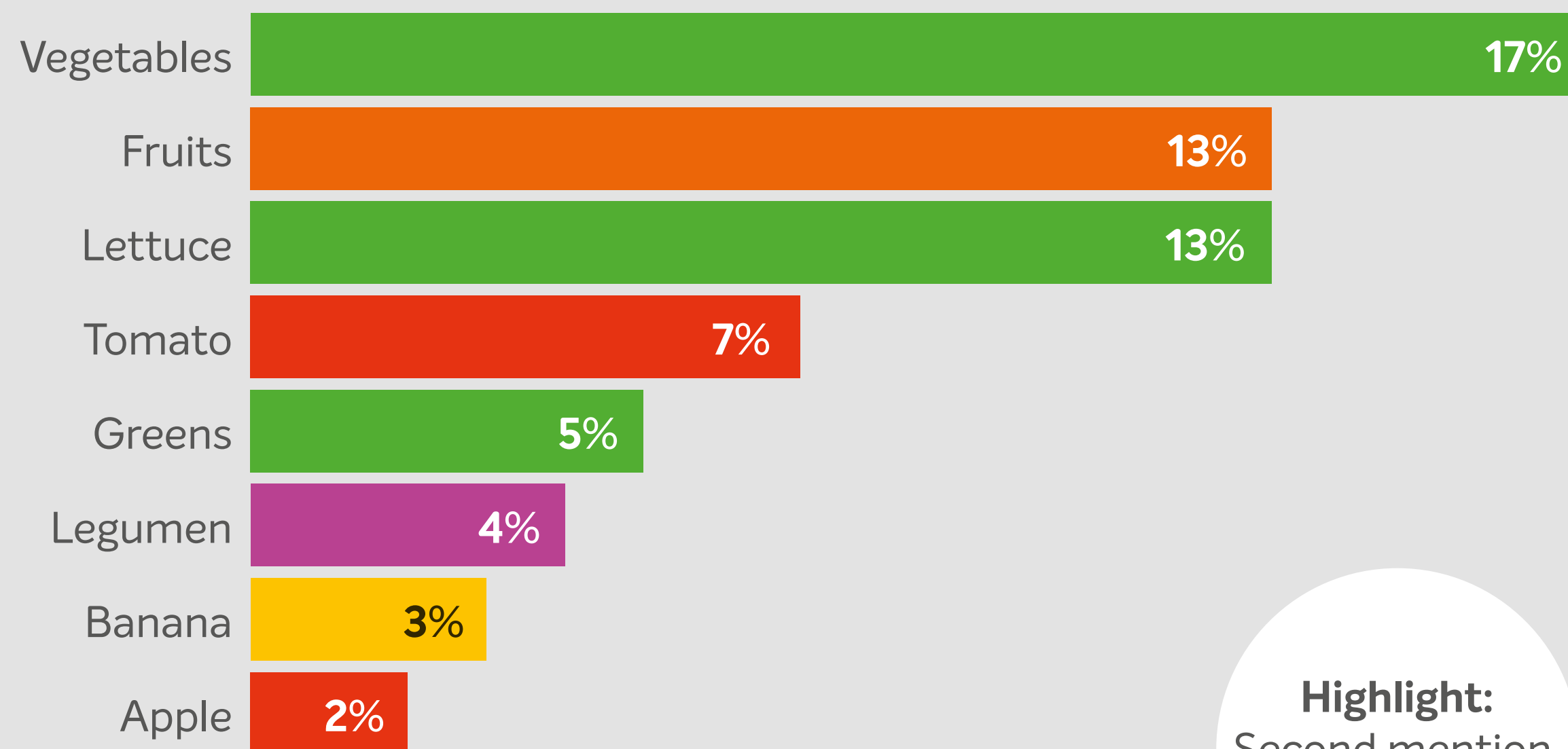


Basis: 600 interviewed | **Question:** In a scale of 1 to 5, where 1 means much cheaper and 5 much more expensive, how do you rate the organic products prices compared to non organic products? Do you believe that the difference in organic products prices is justified?

Most consumed organic products

Spontaneous

600
research
subjects
of organic
consumers

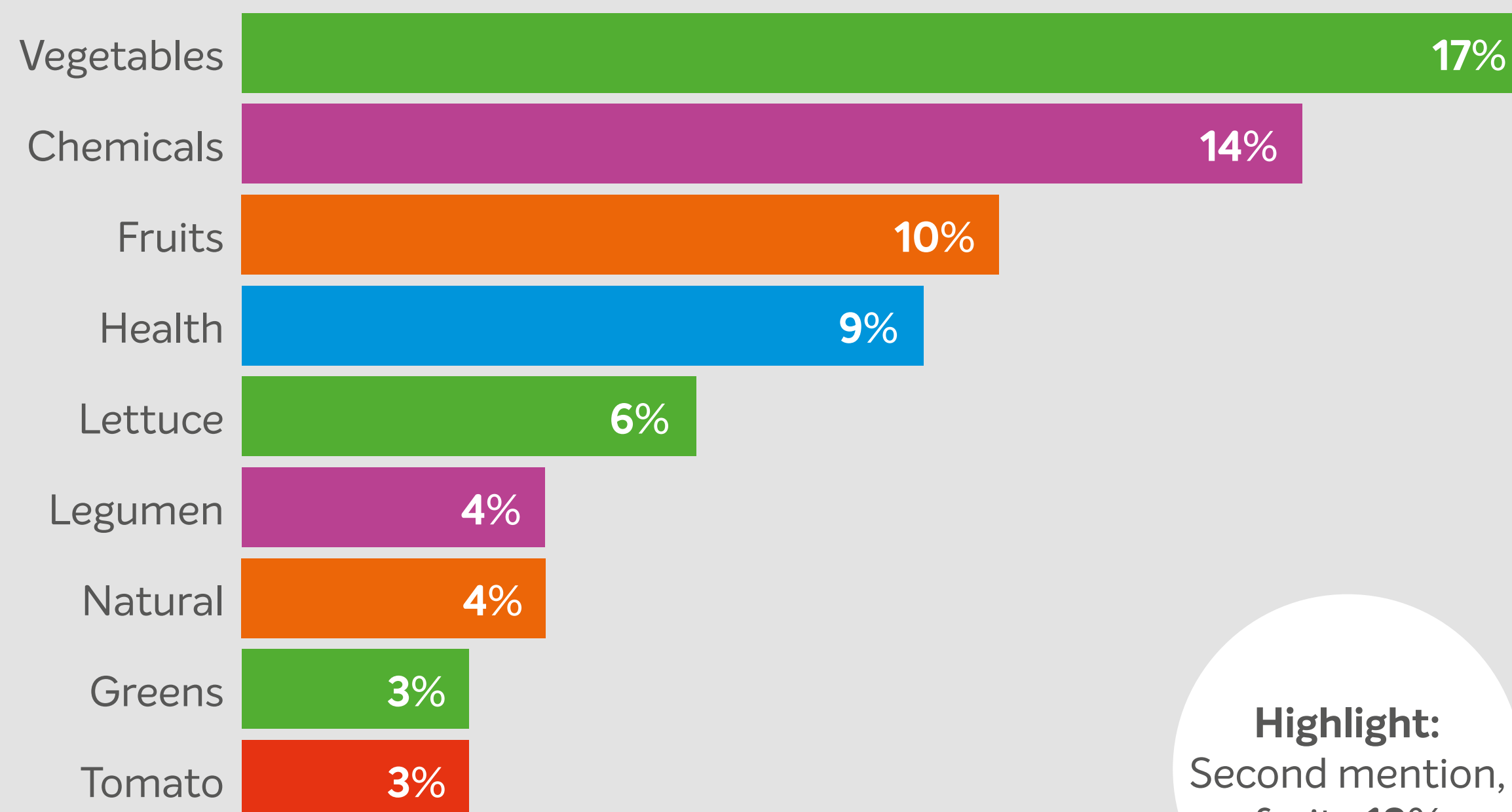


Highlight:
Second mention,
fruits **36%**

The most frequent associations of organic products

MR – Spontaneous

600
research
subjects
of organic
consumers



Highlight:
Second mention,
fruits **18%**

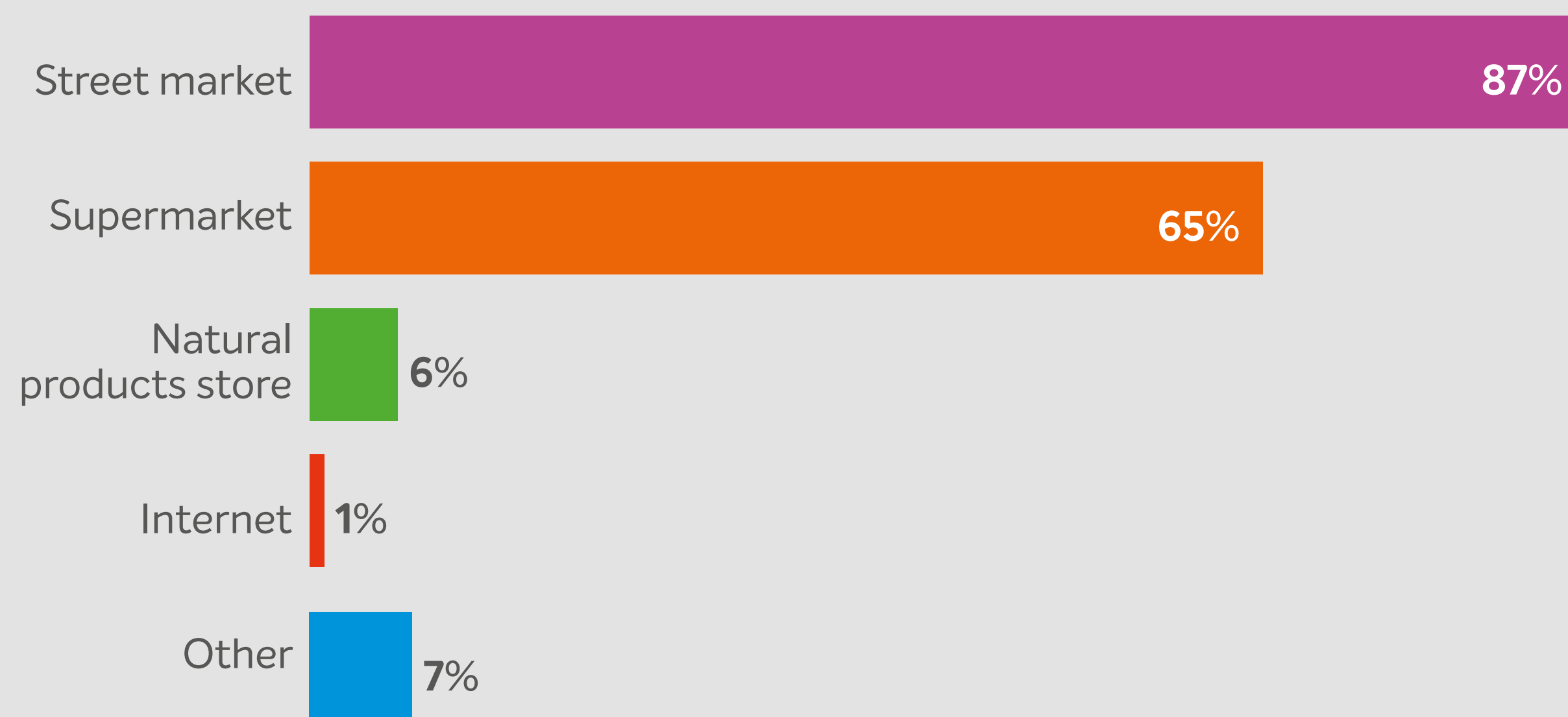
Basis: 600 interviewed

Question: When we talk about organic products what is the first thing that you have in mind?

Preferred places to buy organic products

MR – Spontaneous

600
research
subjects
of organic
consumers

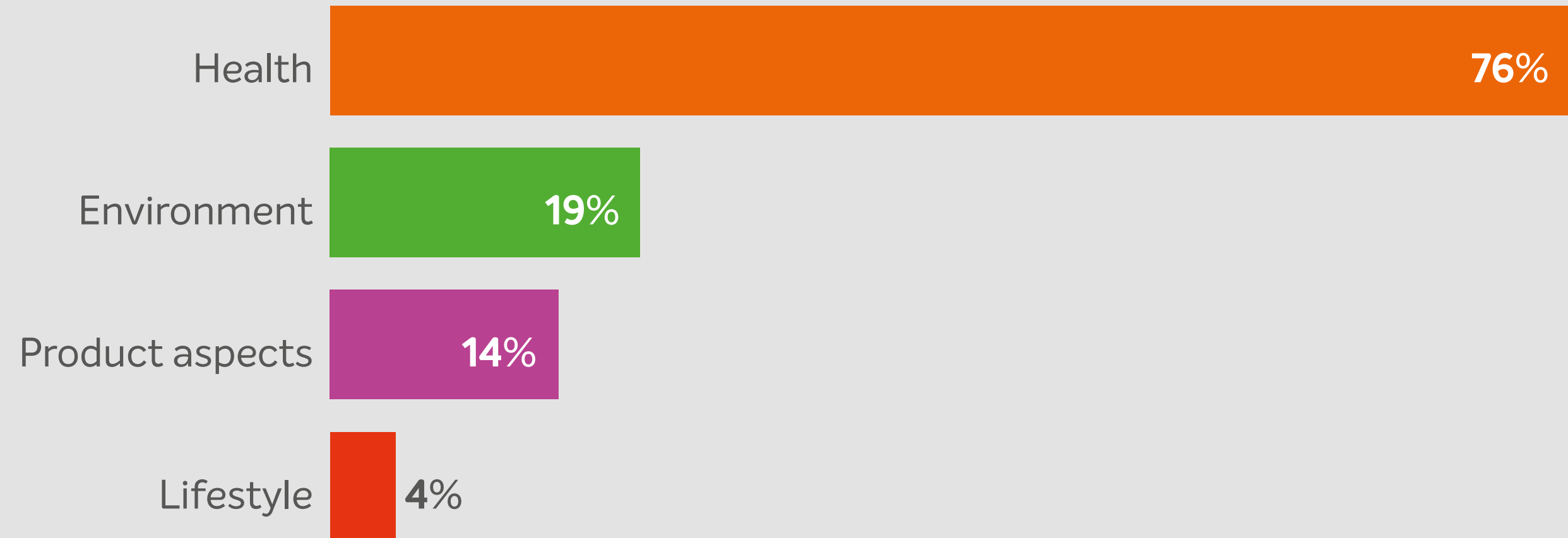


Basis: 600 interviewed
Question: What places do you prefer to buy or consume organic products?

Reasons to consume organic products (grouped)

MR – Spontaneous

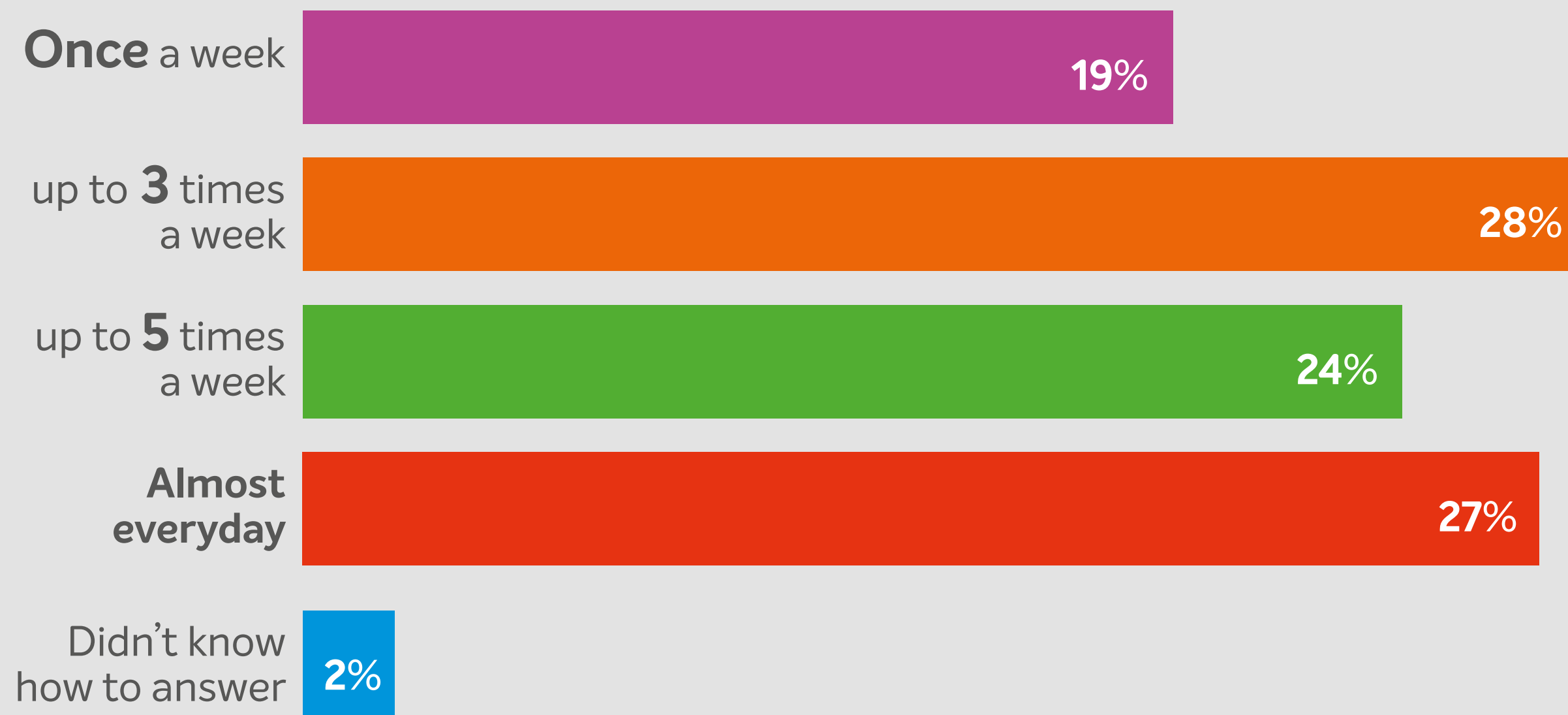
600
research
subjects
of organic
consumers



How often do you consume organic products per week?

Spontaneous

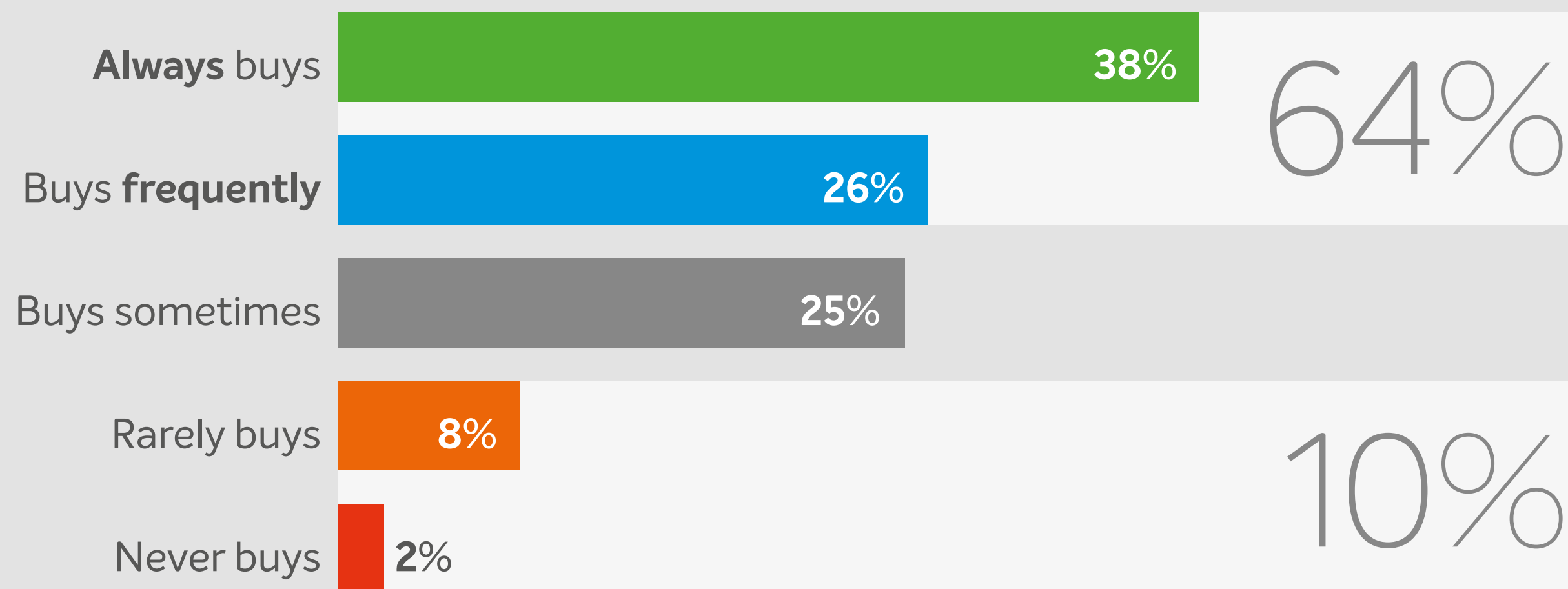
600
research
subjects
of organic
consumers



How often you consume organic fruits and vegetables?

Stimulated

600
research
subjects
of organic
consumers



Basis: 600 interviewed

Question: What organic product you consume the most?

How would you rather find the organic products in a store?

Stimulated

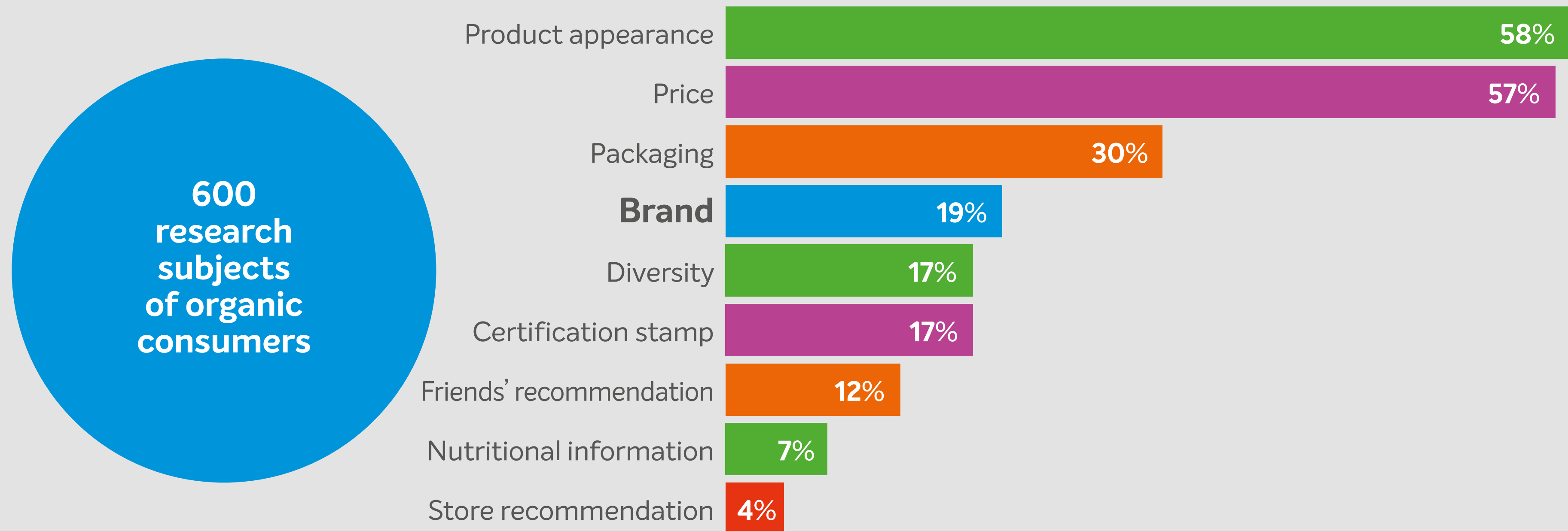


Basis: 600 interviewed

Question: When you go to your favorite store to buy organic products, would you prefer it arranged in a specific section / aisle / shelf or arranged next to non organic products?

Standards used when buying organic products

MR – Spontaneous



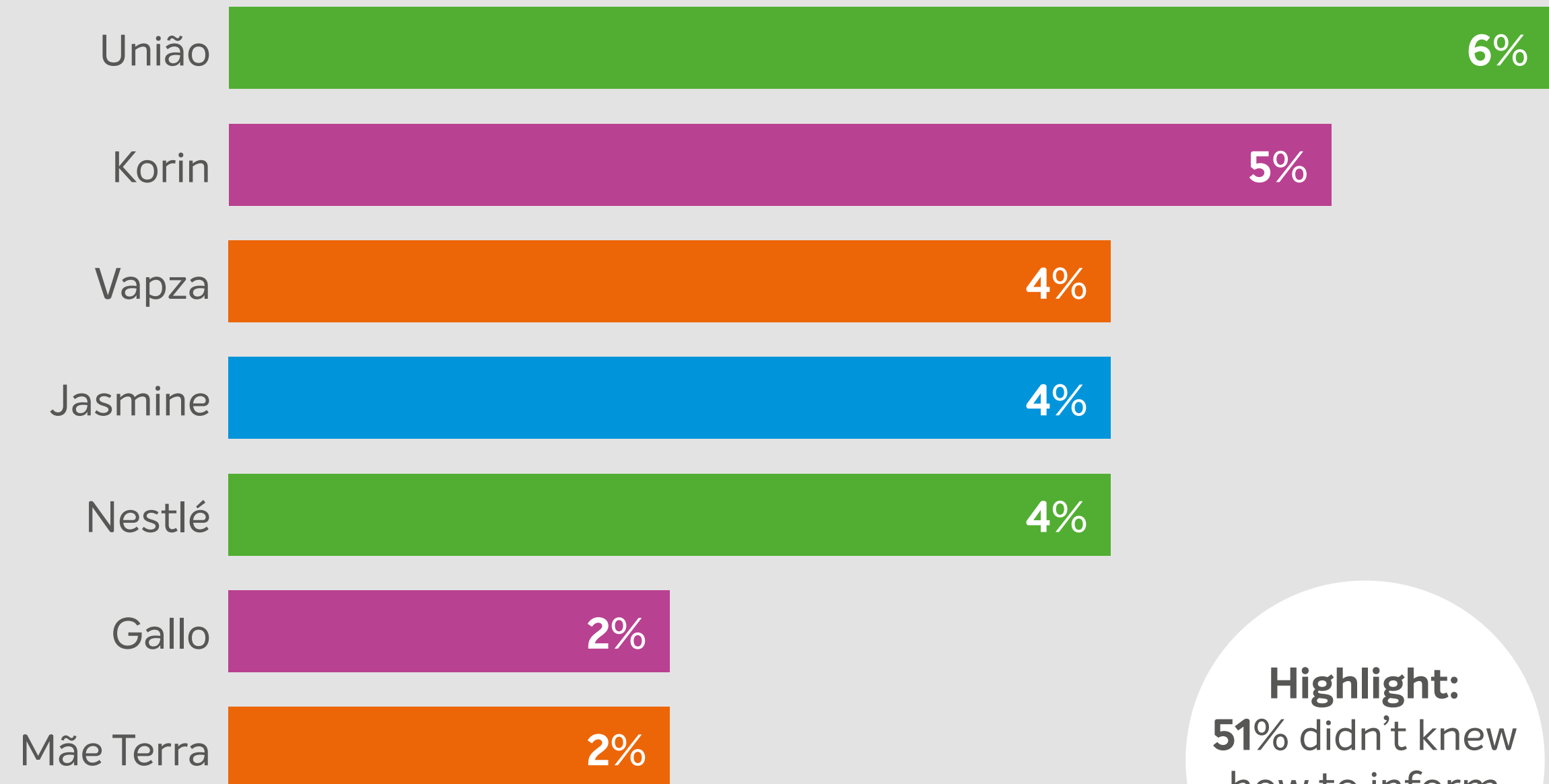
Basis: 600 interviewed

Question: Which standards do you use when you are in your preference store choosing organic products?

Most associated organic products brands

MR – Spontaneous

600
research
subjects
of organic
consumers



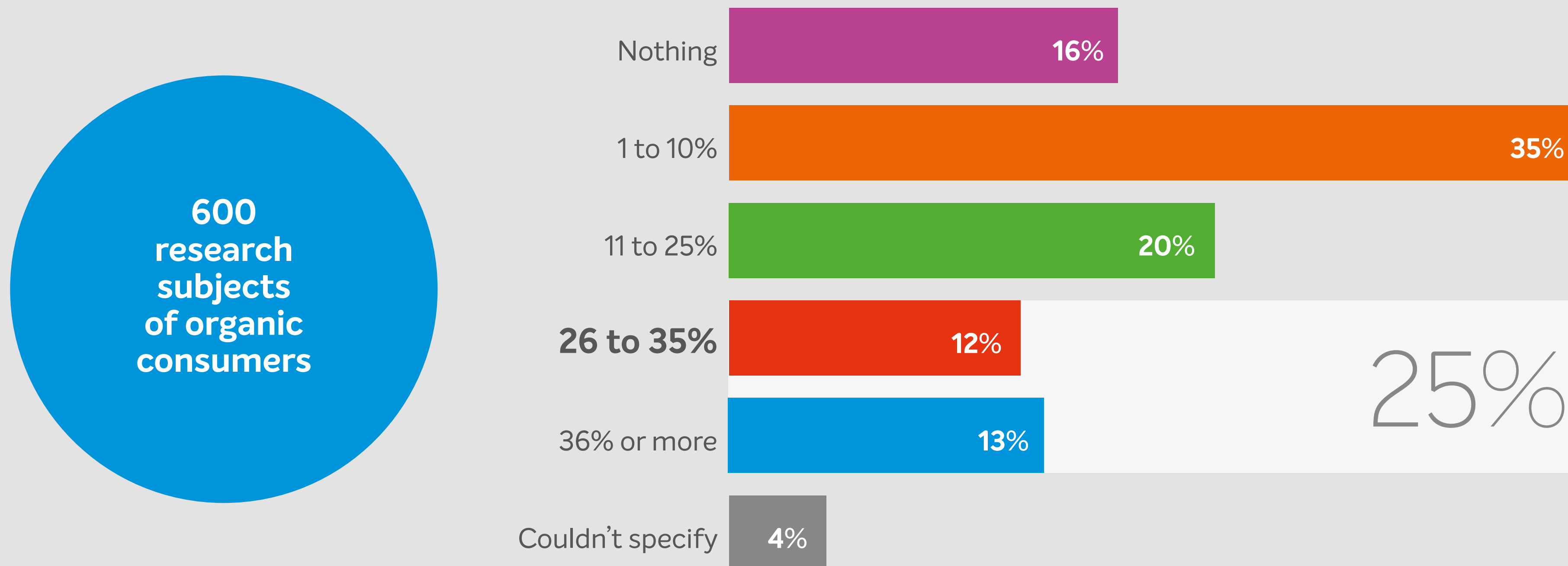
Highlight:
51% didn't know
how to inform
brands

Basis: 600 interviewed

Question: Regardless of whether you consume products from these brands, what are the brands currently available in the market that most relate to organic products?

How much would you be willing to overpay for an organic product?

Spontaneous



Basis: 600 interviewed

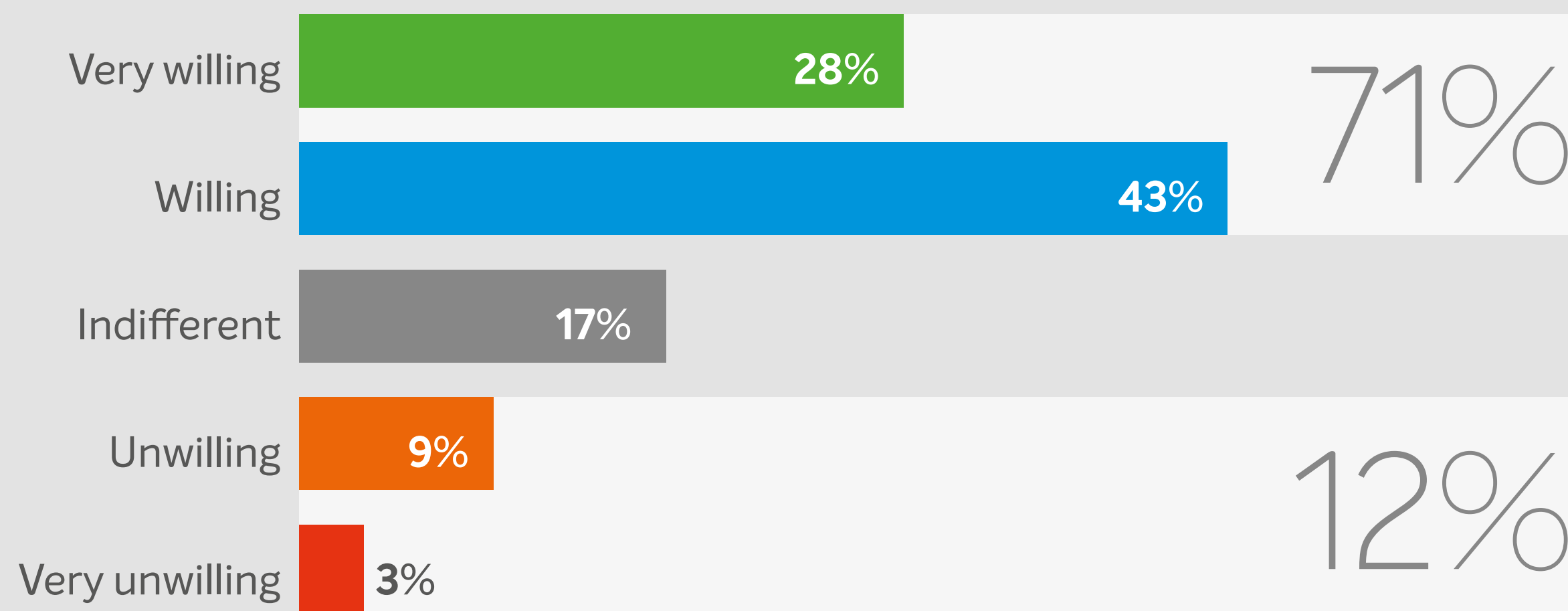
Question: On average, how much would you be willing to accept to overpay for an organic product compared to a non organic product?

Potential growth in the organic products consumption

Stimulated

Willingness to consume more organic products within 6 months

600
research
subjects
of organic
consumers



Basis: 600 interviewed

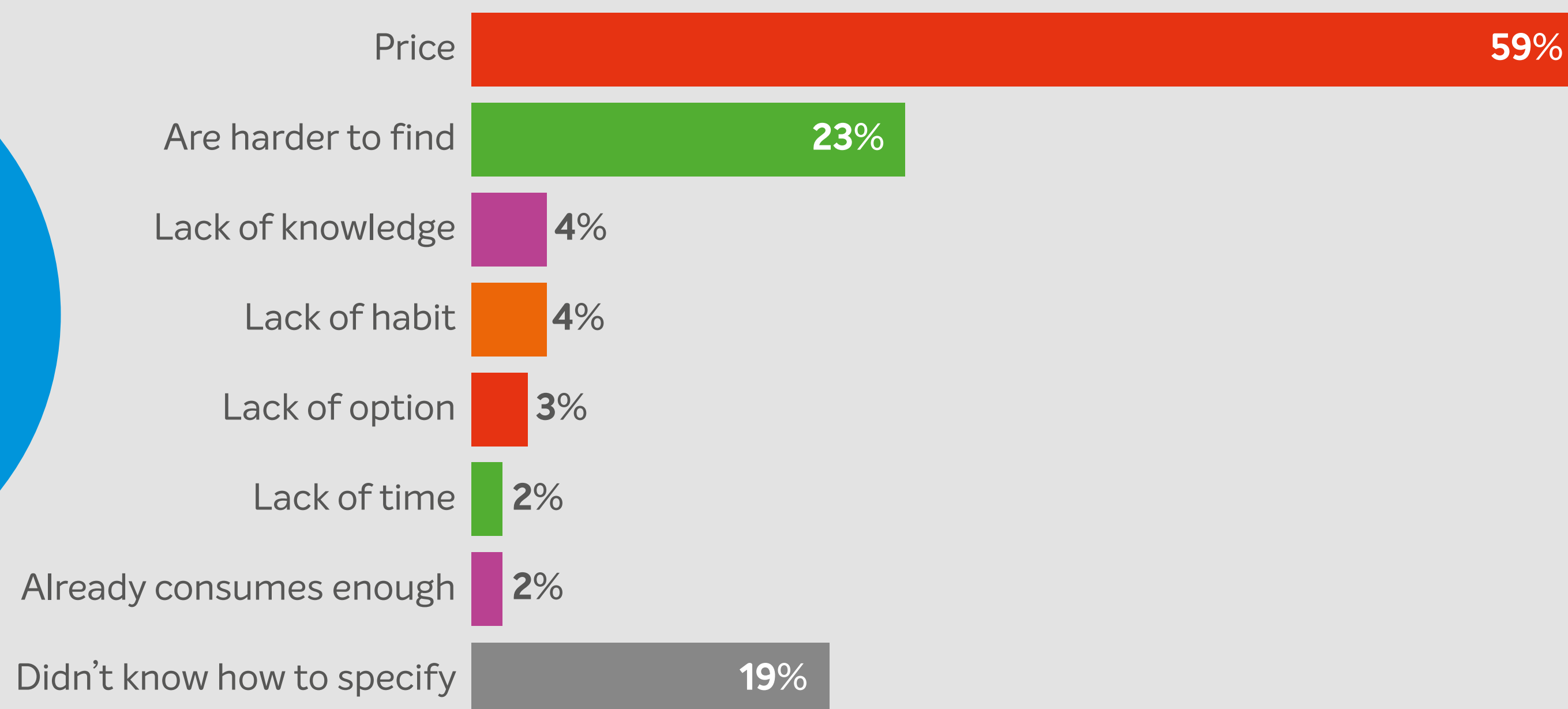
Question: How willing are you to consume more organic products within six months?

Potential growth of organic products consumption

MR – Spontaneous

Which are the reasons for consumers not to choose organic products in a higher amount

600
research
subjects
of organic
consumers

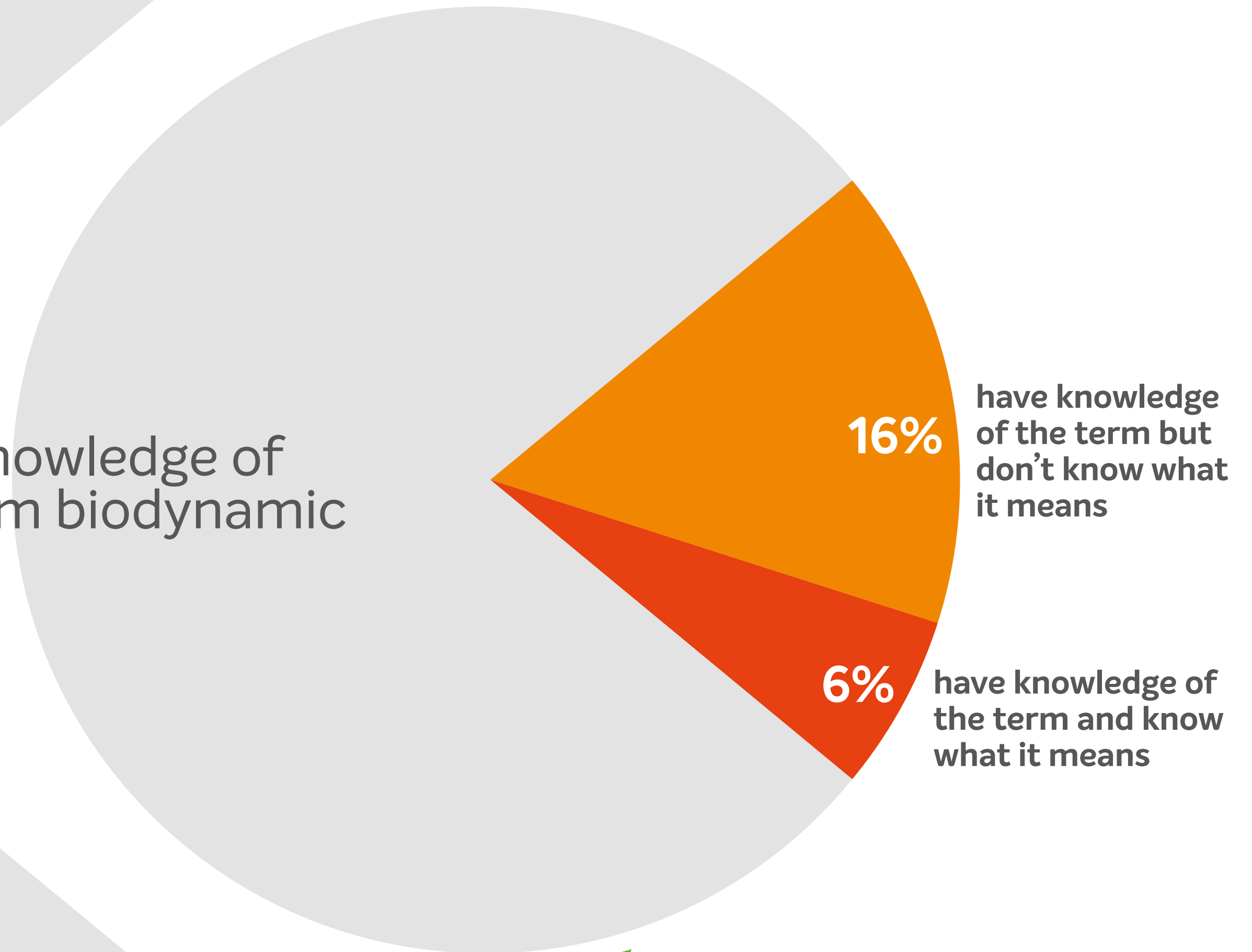
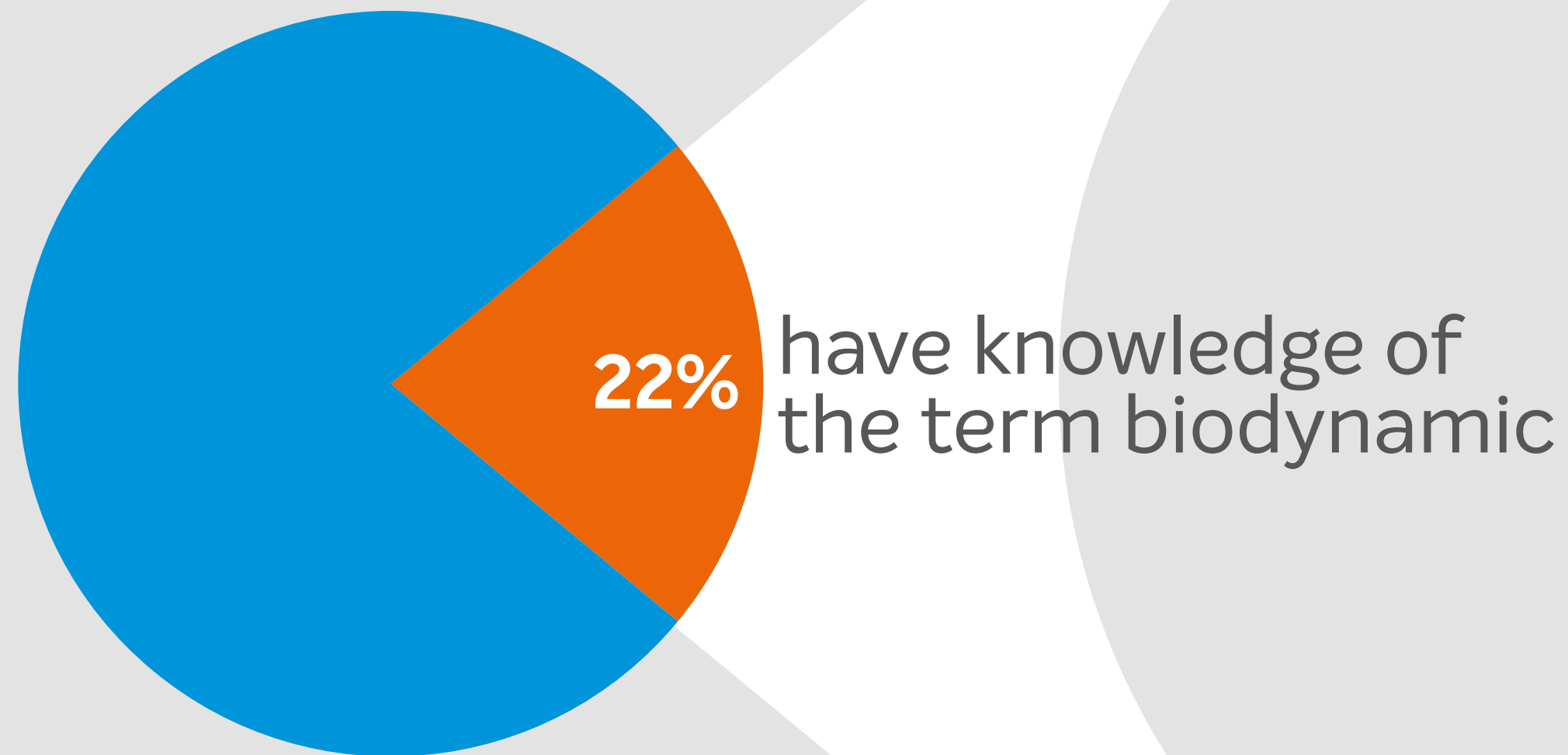


Basis: 600 interviewed

Question: Which are the reasons for not consume organic products in a higher amount

Knowledge of what are biodynamic products

Spontaneous



Basis: 600 interviewed

Question: Could you tell what a biodynamic product is?

Reasons of why you don't consume organic products

MR – Spontaneous – Among those who did **not** buy organic products

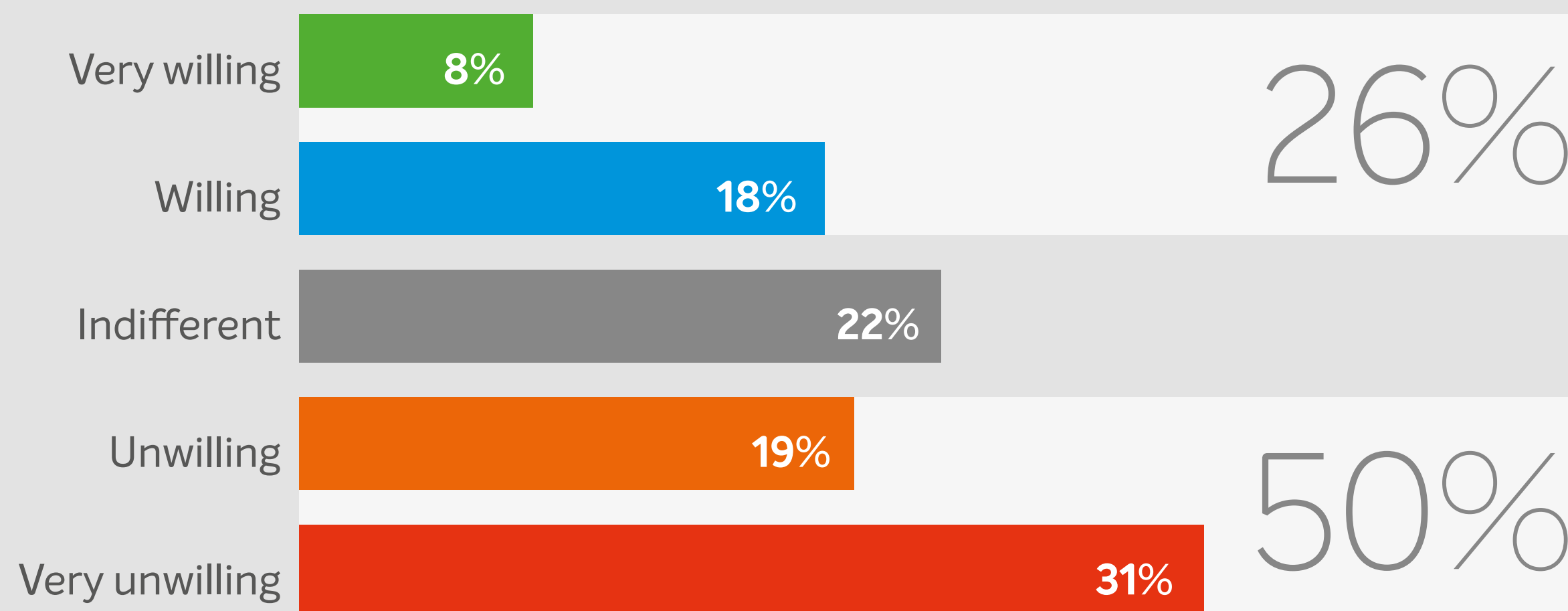
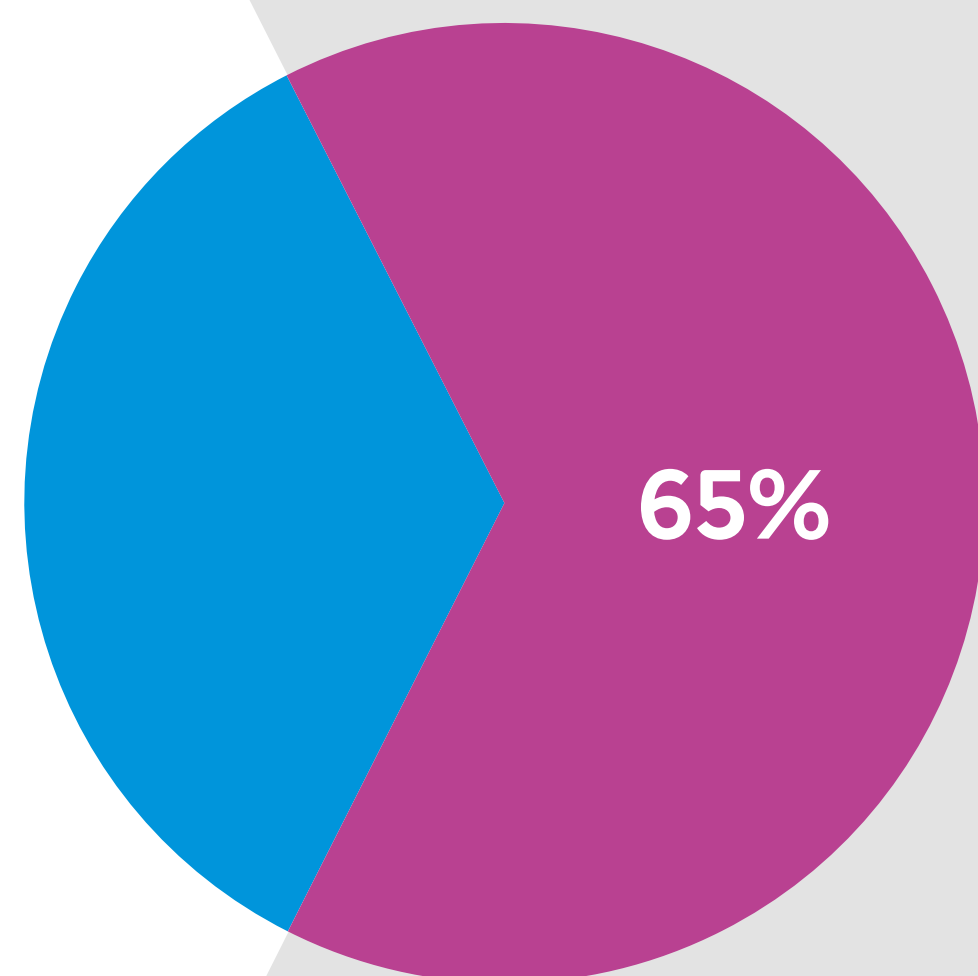


Basis: 667 interviewed

Question: What are the reasons for you to not consume organic products?

Willingness to start consuming organic products

Stimulated – Among those who do **not** buy organic products



Basis: 667 interviewed | **Question:** In a scale of 1 to 5, where 1 means very unwilling and 5 very willing, how willing you are on consuming or consuming more organic products within 6 months?



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