

Natural and Organic Food Shopper - US - 2022

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This report looks at the following areas:

- External market factors impacting the natural and organic food landscape
- Competitive strategies and market opportunities for natural and organic brands
- Conventional versus natural and organic product type purchase by food and beverage category
- Changes in purchase compared to one year ago
- Organic product purchase motivators and barriers
- Opinions and attitudes toward natural and organic products

Overwhelming agreement among consumers that natural and organic foods should be more affordable (80%) – even among those consumers decidedly against natural and organic purchase (89%) – points to a larger theme of disengagement based in skepticism related to premium costs. As natural and organic brands ride the waves of inflationary chaos right alongside conventional, they must work overtime to continue clearly communicating their differentiating factors – even to consumers already presently engaged and in support.

One of the biggest threats to the natural and organic markets is sheer product accessibility complicated by the many (and mounting) food production challenges: extreme weather and labor shortages, inflation's continued attack on all things CPG and distrust in the food system itself. Understand how presently engaged natural and organic shoppers' blended (and fluid) product type repertoires poise brands for cross-category interest in both natural and organic; expanding lines to capture the spectrum of needs ensures that compromises in preferred product purchase, if necessary, do not mean losing a consumer altogether.

Walking the walk and leading with transparency and clear value communications is the surest way to preserve brand integrity, build consumer trust and come out ahead once the storm passes.



"Natural and organic brands' uphill battle in justifying their products' prices has only gotten steeper as inflation's record grip heightens sensitivity to sticker shock and scrutiny toward all products' value."

- **Adriana Chychula, Analyst**
- **Food, Drink and Nutrition**

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