

INTERNATIONAL
**FRESH
PRODUCE**
ASSOCIATION



2024 Consumer Tracker
BRAZIL



Brazilians & Sustainability

The International Fresh Produce Association (IFPA) is the leading global trade association representing companies in the fresh produce and floral supply chains.



Research Purposes & Objectives

The IFPA performs a Global Intelligence Consumer Tracking Study on an annual basis to understand and trend consumer behavior and motivations when purchasing fresh fruit and vegetables.

Research is conducted in seven (7) unique geographic areas:

- United States
- Australia
- Brazil
- China
- Germany
- UK
- South Korea

This report summarizes the findings in **Brazil with 753 consumers**.

Margin of Error:

Overall, the sample size has a margin of error of +/- 1.4% at a 95% level of confidence; or +/- 3.6% for Brazil.



Methodology and Sample Composition

A total of 753 Brazil based surveys were conducted for the study from December 3 - 18, 2024. Participants were sourced from leading online research panels.

To qualify for study inclusion, respondents were screened to meet the following qualifications:

- Age 18 - 78
- Primary or shared responsibility for purchasing groceries for household
- Purchase groceries once a month or more often
- Reside within Brazil
- Does not work in a competitive industry

All research was carried out in compliance with all relevant legal and ethical requirements within Brazil and in compliance with ISO 20252:2019.



Brazilians & Sustainability

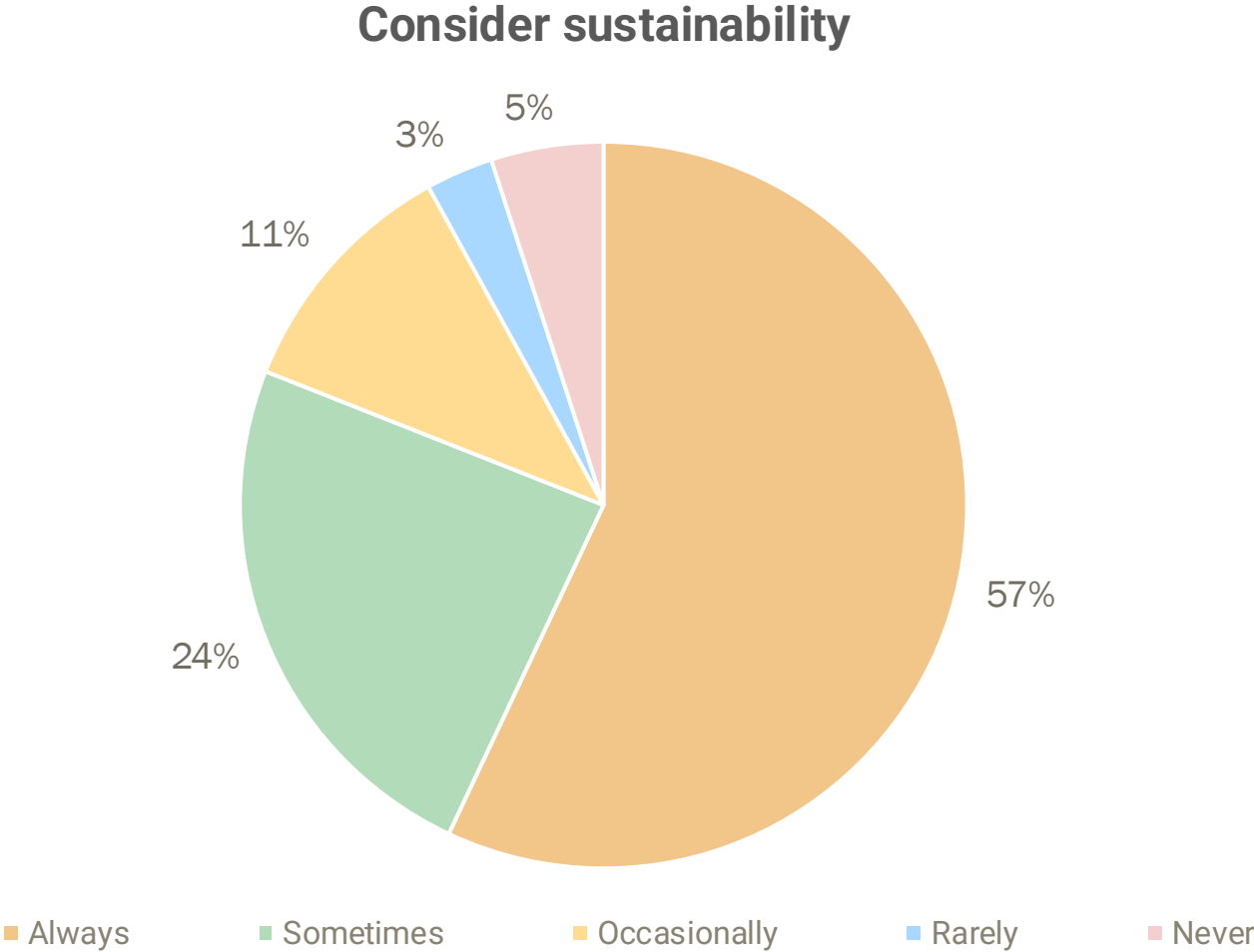
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Sustainability

Just eight out of ten Brazilian consumers consider sustainability attributes, such as growing methods and packaging materials, when purchasing fresh fruits and vegetables. Production methods and pesticides have the greatest influence on purchasing decisions. Consumers are most confident in defining the term "organic," followed by recyclable packaging, locally grown, and sustainably grown. Nearly 90% of Brazilian consumers are willing to pay a premium for produce labeled as "organic". Almost three fourths of consumers are willing to pay a premium for packaging.



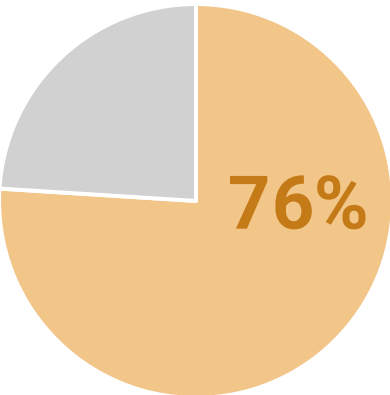
81% of Brazilians consider sustainability when purchasing fruits and vegetables.



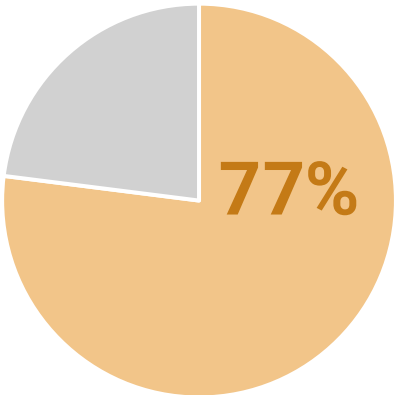
How often are you to consider attributes associated with sustainability, such as growing methods and packaging materials when purchasing fresh fruits & vegetables and cut flowers in the supermarket?

Brazilians are **willing to support sustainability.**

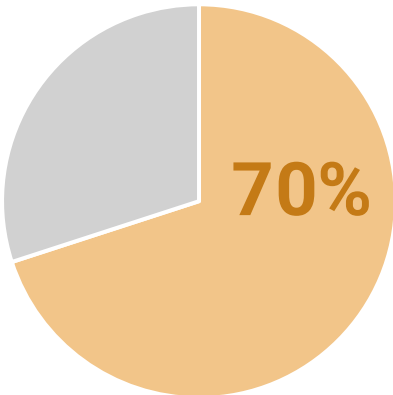
I am willing to make lifestyle changes to benefit the environment (i.e., composting, recycling, reusables)



I try to eat organic foods whenever possible

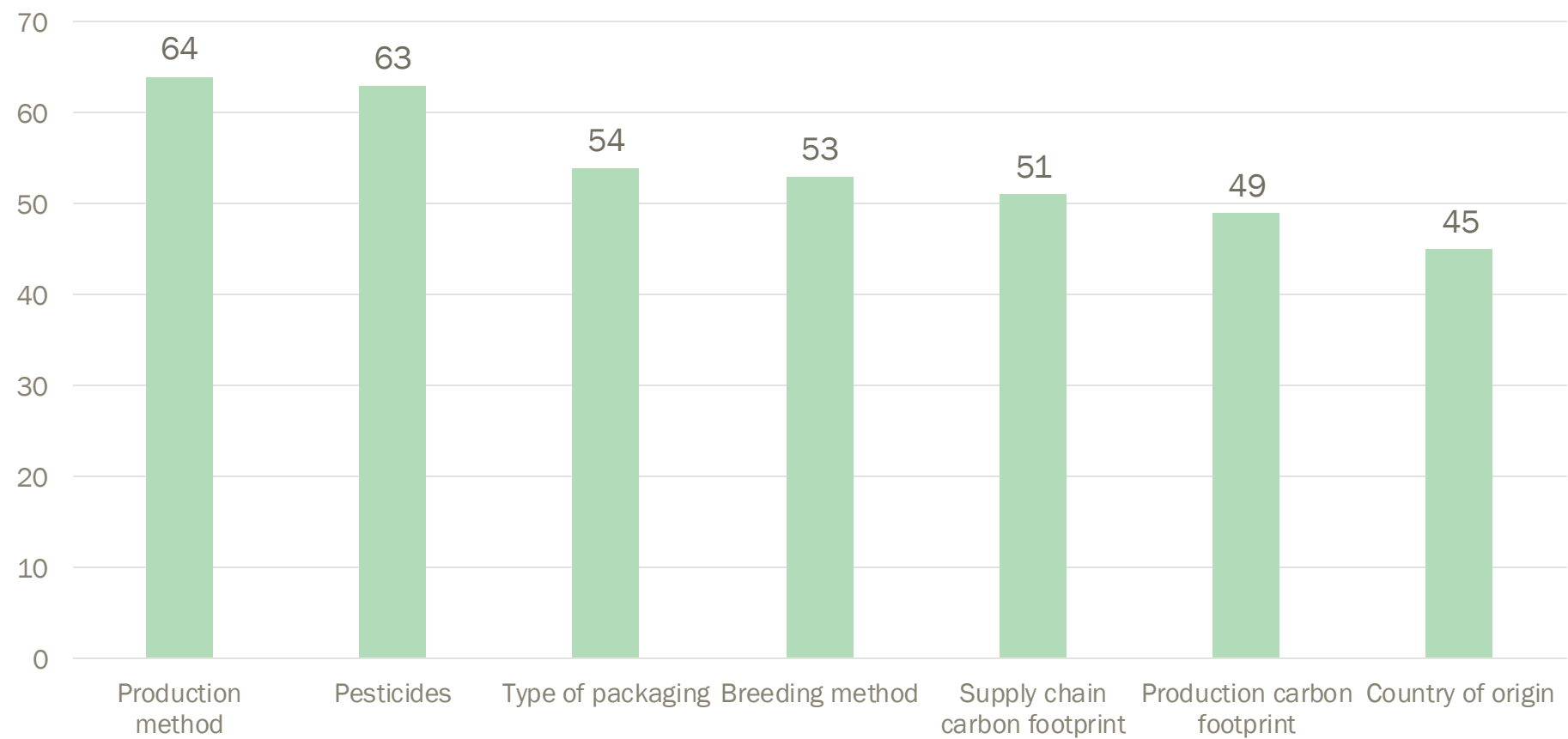


I am willing to pay more for products that are good for the environment/sustainable



Please indicate how much you agree or disagree with each statement.

Sustainable issues are growing in influence when purchasing fresh fruits and vegetables.

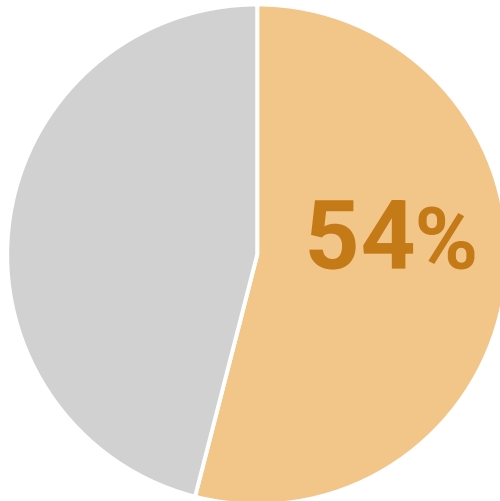


How much do the following attributes influence your purchasing decision for fresh fruit and vegetables?

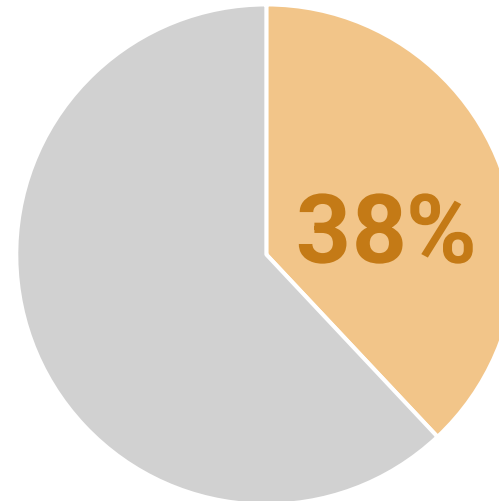


More than half of Brazilians understand the terms carbon farming and **almost 40% understand climate smart ag.**

Climate Smart Ag

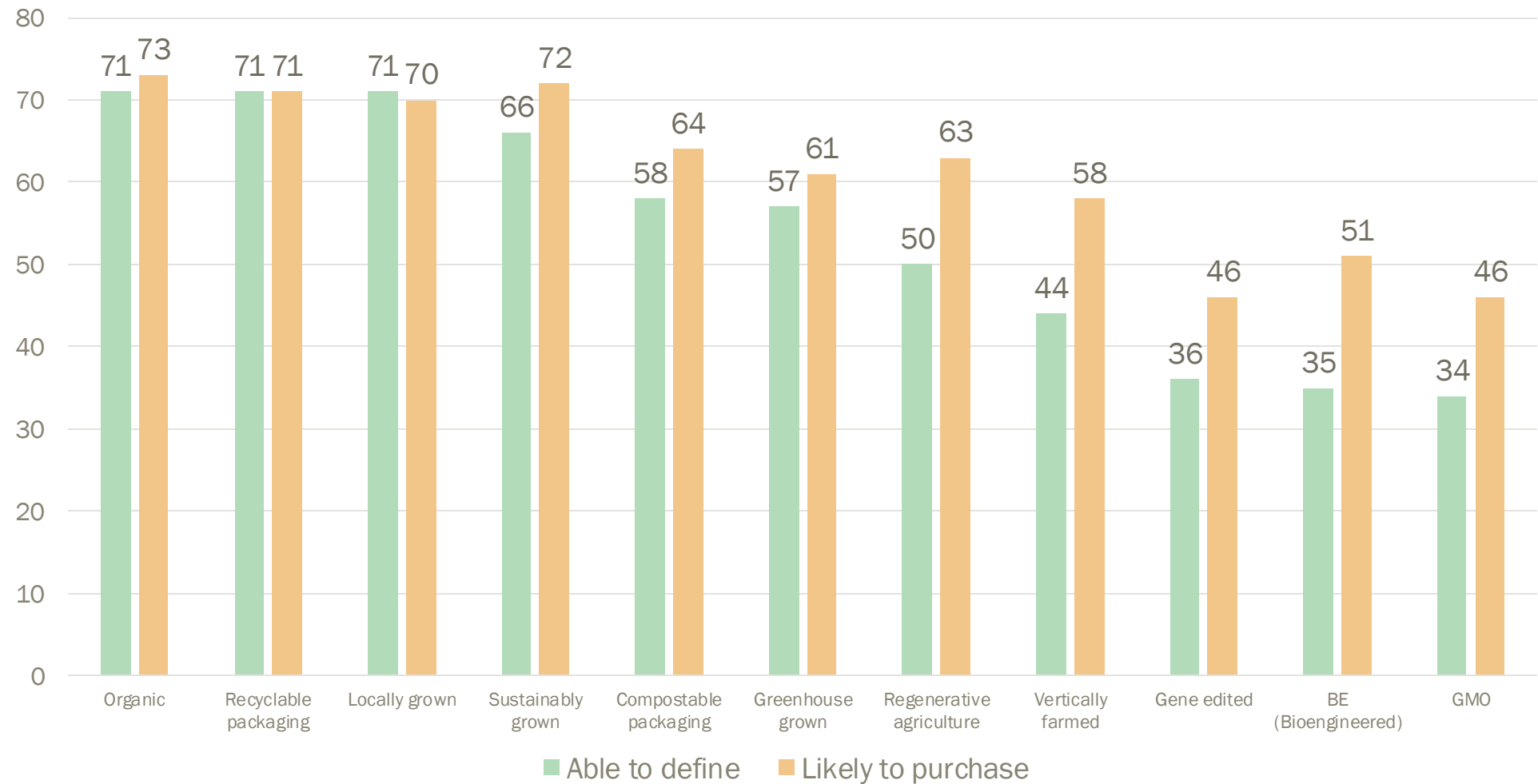


Carbon farming



How well can you define the following terms used in the produce department?

Brazilians are willing to purchase items that use sustainable practices **when understanding them** as well as **without fully understanding others**.



How well can you define the following terms used in the produce department?

Brazilians continue to make decisions about quality and food safety **without fully understanding the terminology.**

	Define the term (extremely/likely)	Likelihood to purchase (extremely/likely)	Perceived Quality (good/excellent)	Perceived Safety (good/excellent)
Organically grown	71%	73%	79%	82%
Locally grown	71%	72%	79%	73%
Field grown	-	-	82%	76%
Greenhouse grown	-	-	75%	68%
Regeneratively grown	50%	63%	71%	55%
Vertically farmed	44%	58%	73%	59%

Please rate the perceived quality of the following produce attribute

Please rate the perceived food safety of the following produce attributes:



Brazilians struggle to define molecular breeding. It is perceived to produce a quality product but the safety perception is low.

	Define the term (extremely/likely)	Likelihood to purchase (extremely/likely)	Perceived Quality (good/excellent)	Perceived Safety (good/excellent)
2024 Molecular breeding	34%	46%	62%	44%

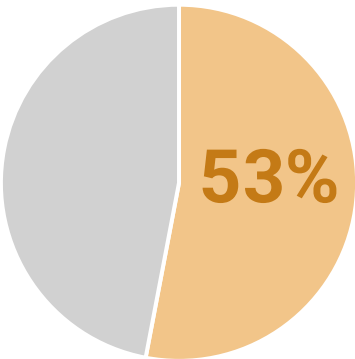
Please rate the perceived quality of the following produce attributes:

Please rate the perceived food safety of the following produce attributes:

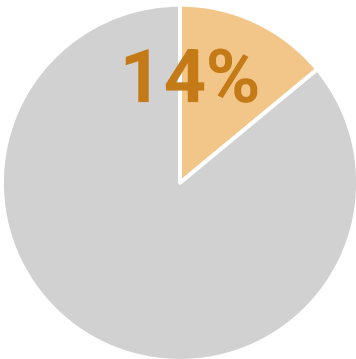


If price were a non-factor, organically grown would be the most likely produce to be purchased by Brazilians.

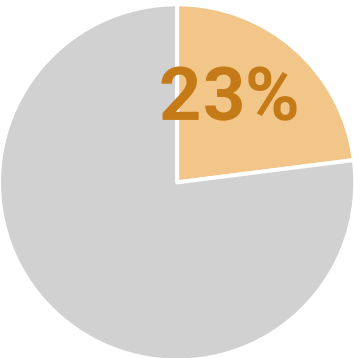
Organically Grown



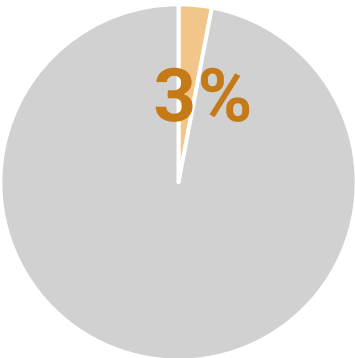
Locally Grown



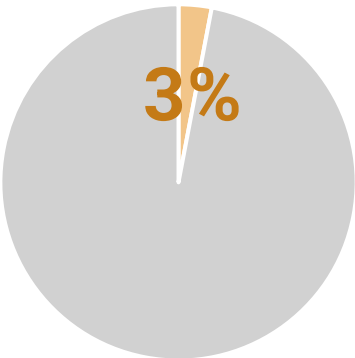
Field Grown



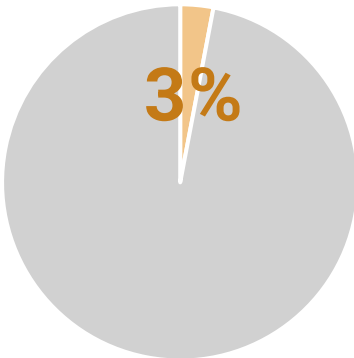
Greenhouse Grown



Vertically Grown



Regeneratively Grown

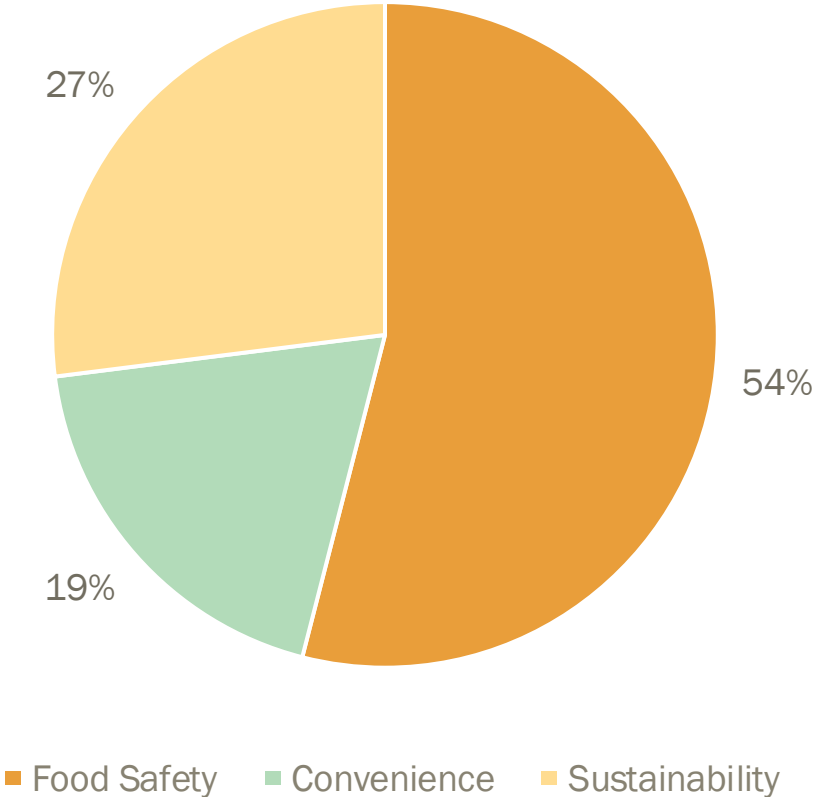


When grocery shopping for fresh fruits and vegetables, if priced the same, which product would you most likely purchase?



The first consideration about packaged produce for Brazilians is food safety.

First consideration when comparing packaged and non packaged fruits and vegetables



When comparing packaged to non-packaged fresh fruits and vegetables in the supermarket, what is your first consideration about packaged produce?

Breeding methods not likely to generate a premium.

	GMO	BE (Bioengineered)	Gene Edited
Average premium total is willing to pay	5.8%	7.05%	6.25%
Brazilians not willing to pay a premium in 2024	44%	36%	42%

How much more are you willing to pay for the following produce attributes?

Production methods not likely to generate a premium.

	Vertically Grown	Regenerative Ag
Average premium total is willing to pay	7.85%	8%
Brazilians not willing to pay a premium in 2024	28%	29%

How much more are you willing to pay for the following produce attributes?



Production methods likely to generate a premium.

	Greenhouse grown	Locally Grown	Sustainably grown	Organic
Average premium total is willing to pay	8.15%	9.55%	10.7%	11.65%
Brazilians not willing to pay a premium in 2024	27%	20%	15%	11%

How much more are you willing to pay for the following produce attributes?

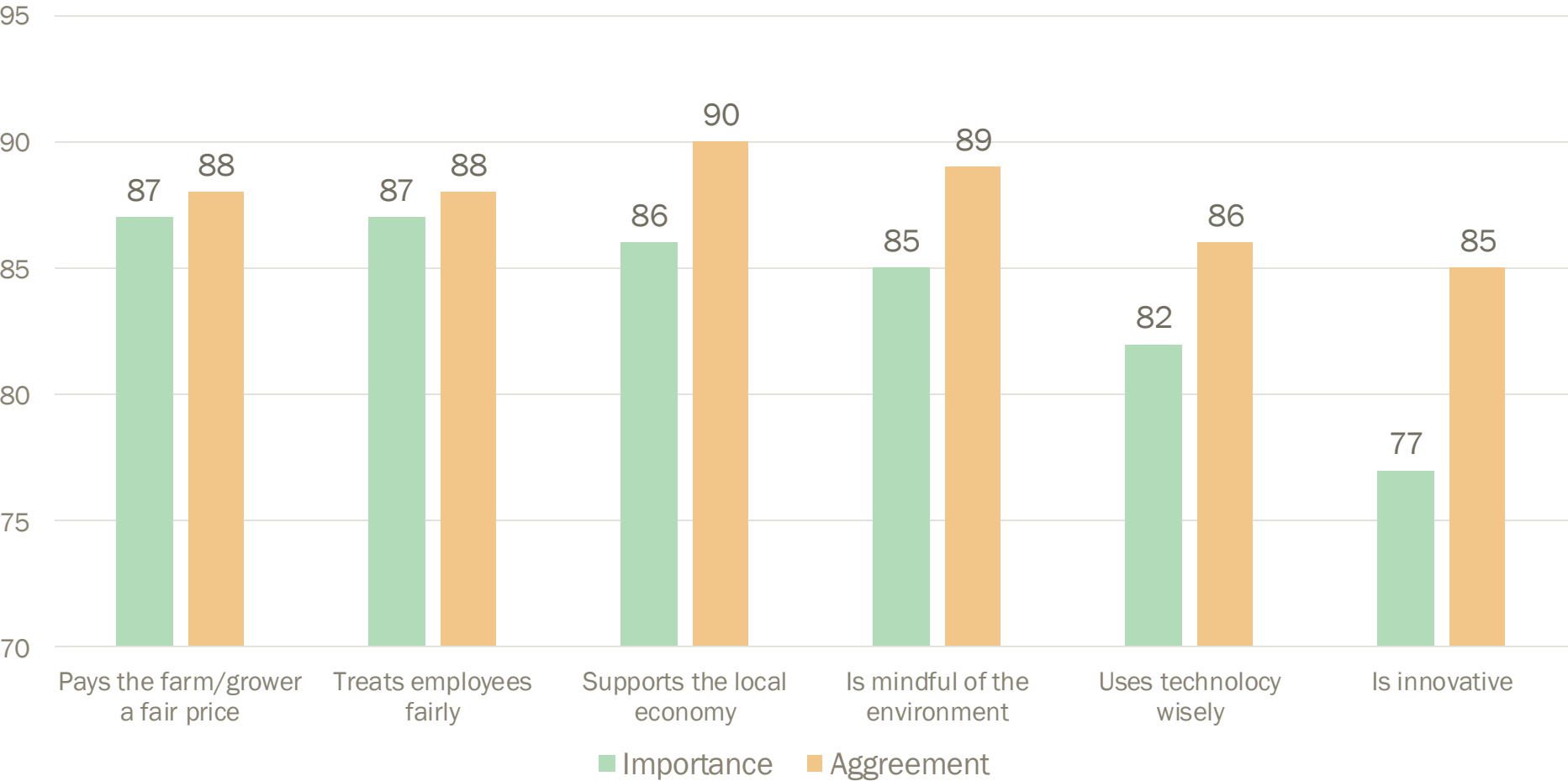
Packaging **likely to generate a premium with more than three quarters of Brazilians**

	Recyclable Packaging	Compostable Packaging
Average premium total is willing to pay	9.45%	8.85%
Brazilians not willing to pay a premium in 2024	22%	23%

How much more are you willing to pay for the following produce attributes?



In all areas, **the produce industry lives up to consumer expectations.**



When thinking about the produce industry, how much do you agree with the following?