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ORGANIC 2022: Then, Now, Next

A Hartman Group Syndicated Research Report

Published: April 2022
Market Coverage: U.S. Market

CONSUMER/ SHOPPER INSIGHTS

FORESIGHT AND TRENDS

STRATEGIC CONSULTING

INNOVATION AND IDEATION

Organic 2022: Then, Now, Next

The Hartman Group's biennial survey of organic and natural consumers provides robust consumer insights and in-depth analysis backed by a range of data, charts, graphs, and illustrations. *Organic 2022: Then, Now, Next*, offers comprehensive consumer-centered perspective on the key topics, motivations, tensions, and drivers associated with the organic and natural marketplace both today and in the future.

Hartman Group Syndicated Report Published: April 2022 | Report length: 112 pages | Market coverage: U.S. Market

Organic 2022: Then, Now, Next features unique hybrid analyses of both quantitative and qualitative data drawn from a study-specific survey and consumer interviews. The 112-page report is an essential, investigative research study, providing in-depth analysis and thought-provoking insights backed by a range of data for startups, established companies, investors, and stakeholders across the food and beverage industry.

What's Included?

- Executive summary
- General report (PowerPoint and PDF)
- Demographic data tables (Excel)

Explore the Report

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Methodology

- Integrated qualitative and quantitative methodologies.

- **Quantitative:** Online national survey February 1–11, 2022, n=2,858 U.S. adult primary shoppers aged 18–76 (MOE ±1.8% at 95% confidence level). Respondents recruited as a nationally representative sample. Results balanced by age, gender, division, income, race/ethnicity, and presence of children to match the 2022 Census Bureau Current Population Survey.

- **Qualitative:** Digital Ethnographies, N=16 participants. Week-long immersive engagement via a virtual platform • Virtual Interviews: Consumers participated in 1-hour virtual interviews to contextualize assignment uploads and dig deeper into key topic areas.

- **Qualitative:** Follow-up In-depth Interviews, N=8 selected from digital ethnography participants. Hour-long interview focused on delving deeper into responses from the digital ethnography.

Organic 2022: Then, Now, Next

Executive Summary

Chapter One: The World of Organic

Organic sales continue a decades-long growth trajectory as consumers increasingly look to take health into their own hands.

Organic food sales growth in the United States from 2000 to 2020 (chart)

Organic food and beverage usage (trended chart)

Hartman Group's World of Organic segmentation (model)

Demographic view of consumers within the World of Organic (chart)

Key purchase criteria (analysis)

Organic product usage frequency (chart)

World of Organic Segment Profiles - Core, Inner Mid-Level, Outer-Mid-Level, Periphery (model)

Chapter Two: Organic and Related Perceptions Today

Consumers are looking to simplify purchase decisions in the face of a vast and complex food and beverage landscape –organic certification helps them identify healthier choices at a glance.

Product claim importance (chart)

Reasons to buy organic foods and beverages (chart)

Perceived differences between organic and conventional foods (trended chart)

Associations with the terms Organic and Natural (charts)

Consumer attitudes toward GMOs (chart)

Consumer familiarity with GMOs (chart)

Awareness, trust and use of non-GMO seal (charts)

Key topics in relation to organic: Fresh and less processed, real, clean, local, taste, fair trade

Information sources and trust (chart)

Consumers' information seeking journey (analysis)

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Chapter Three: Sourcing of Organic and Natural Products

Many factors, both personal and structural, affect the way consumers approach sourcing of organic and natural products for themselves and their families.

Organic's reported share of grocery purchases (trended charts)

Organic buyers within channel users (trended charts)

Changes in better-for-you purchasing since before the pandemic (chart)

Trust in different types of organic brands (chart)

The role of private label in organic marketplace

Comparison of private label vs. national organic brands (chart)

Barriers to buying more organic foods and beverages (chart)

Reasons for not buying organic (chart)

Importance of organic sourcing at restaurants (chart)

Importance of better-for-you selection criteria at restaurants (chart)

Chapter Four: Organic across Categories

The mainstreaming of organic has had little effect on the organic adoption pathway, which suggests a largely consistent understanding and experience of organic across consumers.

Organic share of consumer purchasing by category (chart)

Organic's reach within beverage categories (chart)

Adoption pathway for organic food & beverage (model/chart with accompanying dashboards)

Field & Farm: Freshness, analysis and priorities by category: fresh fruits and vegetables, fresh meat, plant-based dairy alternatives, plant-based meat alternatives, dairy milk, dairy yogurt, baby food, functional beverages (charts)

Everyday Fresh & Packaged: Analysis and priorities by category: prepared, ready-to-eat meals, packaged meats, frozen fruits or vegetables, frozen meals or snacks, hot or cold cereal, bars (energy/nutrition/protein/granola/cereal), coffee, ready-to-drink tea, salty snacks, pet foods and treats

Convenience & Indulgence: Analysis and priorities by category: chocolate, seasonings/spices/herbs, juice, flavored waters, functional beverages

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Chapter Five: Organic Tomorrow

The future of organic is closely tied to the roots of the movement, with farmers and industry insiders pushing for innovations that better address organic's original aims.

Implications and Recommendations

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ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy. Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients.

Since 1989, The Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deep study of trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, thereby identifying unique opportunities and winning strategies for our clients.

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