COMPARATIVE REPORT

Comparative Analysis 2021–2022 × 2025

Organic & Biodynamic Foods · Brazil

Transformations in the organic and biodynamic food market over time. Key indicators, trends, and strategic insights on consumption, consumer profiles, price perception, motivations, and challenges for market expansion.

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463 + 202 respondents

SECTION 1

General Summary

The 2021–2022 and 2025 surveys paint a coherent, evolving picture of the organic and biodynamic food market in Brazil. There is continuity in fundamental patterns and gradual advances in biodynamic familiarity, but structural barriers remain central obstacles to market expansion.

88.8%→91%	52.7%→51%	38%→47%	~26%→38%
ORGANIC CONSUMPTION	ORG. + BIODYNAMIC	OVER 5 YEARS	FREQ. 3x+/WEEK
▲ +2.2 p.p.	▼ –1.7 p.p.	▲ +9 p.p.	▲ +12 p.p.

SECTION 2

Indicator Comparison

Indicator	2021–22	2025	Change
Consume organics	88.8%	91%	▲ +2.2 p.p.
Org. + Biodynamic	52.7%	51%	▼ –1.7 p.p.
Organic only	36.1%	40%	▲ +3.9 p.p.
Consume neither	8.9%	7%	▼ –1.9 p.p.
Freq. 3x+/week	~26%	38%	▲ +12 p.p.
>5 years consuming	38%	47%	▲ +9 p.p.
Female	71.3%	66%	▼ –5.3 p.p.
Postgraduates	~29%	62%	▲ significant

Indicator	2021–22	2025	Change
Fair price (org.)	36%	32%	▼ –4 p.p.
Want lower price	31%	40%	▲ +9 p.p.
Value SisOrg	78%	82%	▲ +4 p.p.
Value Demeter	73%	66%	▼ –7 p.p.
No opinion bio. price	30%	12%	▼ –18 p.p.

SECTION 3

Motivation Evolution

Motivation	2021 (rank)	2021 (%)	2025 (rank)	2025 (%)	Δ
Health	#1	91%	#1	78%	Holds
No pesticides	#2	77%	#2	72%	Holds
Quality	#3	69%	#3	68%	Holds
Environment	#4	64%	#4	62%	Holds
Producers	#5	57%	#6	52%	▼ 1 pos.
Social justice	#6	54%	#7	38%	▼ 1 pos.
Animal welfare	#7	41%	#8	32%	▼ 1 pos.
Lifestyle	#8	34%	#9	28%	▼ 1 pos.
Better taste	#9	26%	#5	54%	▲ 4 pos.

Taste: the biggest leap between 2021 and 2025. Rose from 9th to 5th place, and from 26% to 54% of mentions. The organic value proposition now includes sensory experience.

SECTION 4

Barrier Evolution

Barrier (biodynamics)	2021	2025	Change
Lack of access/options	70%	58%	▼ –12 p.p. — improving but still #1
Unawareness	21%	22%	Stable
Price	13%	28%	▲ +15 p.p. — doubled!
No perceived difference	4%	12%	▲ +8 p.p.

Price barrier doubled: from 13% to 28%. This reflects the impact of food inflation during the period — not a shift in perception about biodynamics itself.

SECTION 5

Organics vs Biodynamics — 2025 Status

Dimension	Organics	Biodynamics
Adoption	91% — consolidated	51% — growing
Frequency	38% consume 3x+/week	18% consume 3x+/week
Certification	SisOrg: valued by 82%	Demeter: valued by 66%

Dimension	Organics	Biodynamics
Barrier #1	Price (high but understood)	Lack of access (58%)
Market stage	Maturity / loyalty	Education / access building
Sentiment	Positive and committed	Curious, with knowledge gaps

SECTION 6

Insights & Opportunities

Loyalty outpaces acquisition: The most significant growth is in habit deepening — not new consumer conversion.

Taste as a competitive differentiator: Rising to 5th place signals market maturity. Gastronomic positioning gains relevance.

Price: access barrier, not rejection: Most understand costs as justified, but pressure grew +9 p.p. in 4 years.

Distribution is the biodynamic bottleneck: 58–70% don't adopt due to lack of access. Logistics expansion is the highest-impact investment.

Certification is a strategic asset: SisOrg and Demeter score very high. Label visibility at the POS converts directly.

Education precedes conversion: 22% still don't know biodynamics. Educational initiatives must precede any marketing effort.