

PERCEPTION SURVEY

Research on Organic & Biodynamic Foods

2021–2022 Edition · Brazil

A portrait of consumption habits, price perception, motivations, and awareness of organic and biodynamic foods among Brazilian consumers.



abdsul.org.br

463 respondents

SECTION 1

Overview

The survey was conducted between 2021 and 2022 with 463 respondents, mapping the profile, habits, and value perception of organic and biodynamic food consumers in Brazil. The data reveals a consolidated market among highly educated consumers, with health as the central motivation and access as the main barrier to biodynamics.

463	88.8%	52.7%	71.3%
RESPONDENTS	CONSUME ORGANICS	ORG. + BIODYNAMIC	FEMALE
Total sample	Consumption base	Combined consumption	Gender profile

SECTION 2

Consumption Patterns

Indicator	Result	Highlight
Consume organic + biodynamic	52.7% (244 people)	Expressive combined consumption
Consume organic only	36.1% (167 people)	Potential conversion base
Consume neither	8.9% (41 people)	Low non-consumption rate
Frequency 3x or more per week	~26%	High frequency — solid habit
Consuming for more than 5 years	38%	Significant loyalty
Organic diet: more than 30% of food	~38%	High commitment

Loyalty: 38% have been consuming organics for more than 5 years. The market operates in consolidation mode — the consumer base is loyal and committed.

SECTION 3

Consumer Profile

Dimension	Data	Note
Female	71.3%	Strong predominance
Main age group	51–70 yrs	Mature adults
Bachelor's degree or more	~86%	High education level
Postgraduates (master+)	~29%	Intellectual engagement with sustainability
Main occupation	Not detailed	—

Highly educated profile: ~86% hold a bachelor's degree or higher. This confirms engagement with health and sustainability, but indicates the market has not yet reached lower-income segments.

SECTION 4

Price Perception & Certification

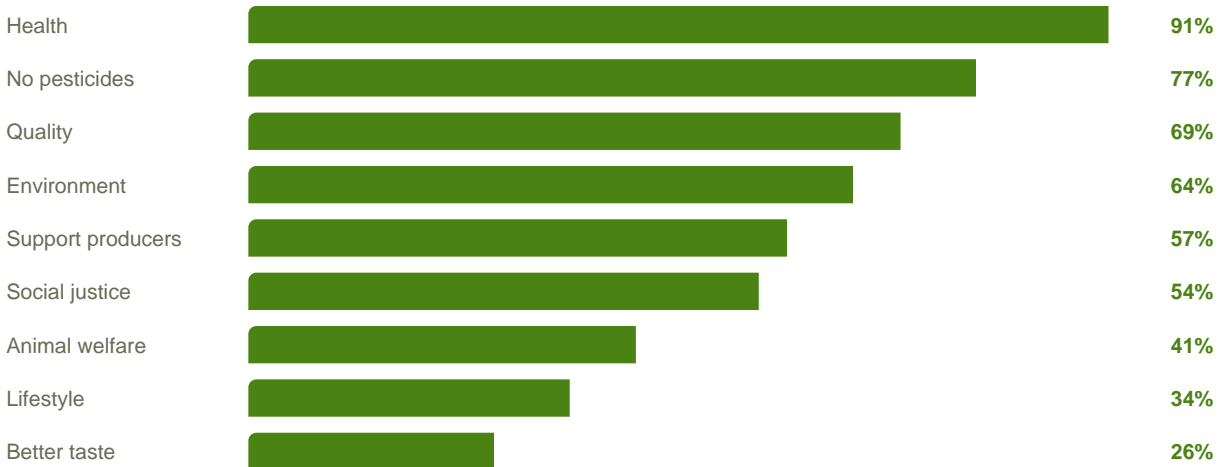
Question	Result
Organic prices are fair	36% agree
Prices could be lower	31%
No opinion on biodynamic pricing	30%
Value SisOrg label (score 4–5)	78%
Value Demeter label (score 4–5)	73%

Certification as a trust asset: 78% value SisOrg and 73% value Demeter with scores of 4 or 5. Certification is the main credibility differentiator for consumers.

SECTION 5

Consumption Motivations

Top reasons to consume organics (% of mentions):



Health dominates motivations: present in over 90% of responses. No pesticides and quality complete the top three. Taste still ranks only 9th — quite different from what we see in 2025.

SECTION 6

Barriers to Biodynamic Adoption

Among organic-only consumers (167 people), reasons for not adopting biodynamics:



Access is the main bottleneck: 70% don't adopt biodynamics due to lack of access or availability — not rejection. Only 13% cite price as a barrier in this edition.