PERCEPTION SURVEY

Research on Organic & Biodynamic Foods

2025 Edition · Brazil

In-depth analysis of consumption behavior, certifications, value perception, and access barriers in a more consolidated organic market.

abdsul.org.br

202 respondents

SECTION 1

Overview

The second edition of the survey, conducted in 2025 with 202 respondents, confirms the consolidation of the Brazilian organic market. The consumption index held at 91%, with frequency and loyalty on the rise. Biodynamics continues to grow, with greater consumer familiarity — though access remains the main challenge.

202	91%	51%	66%
RESPONDENTS	CONSUME ORGANICS	ORG. + BIODYNAMIC	FEMALE
Total sample	▲ from 88.8% in 2021	Stable vs 2021	▼ from 71.3% in 2021

SECTION 2

Consumption Patterns

Indicator	2025	vs 2021
Consume organic + biodynamic	51%	▼ –1.7 p.p.
Consume organic only	40%	▲ +3.9 p.p.
Consume neither	7%	▼ –1.9 p.p.
Frequency 3x or more per week	38%	▲ +12 p.p.
Consuming for more than 5 years	47%	▲ +9 p.p.
Intent to adopt biodynamics	55%	New indicator

Loyalty outpaces acquisition: 3x+/week frequency grew 12 p.p. and the share with 5+ years of consumption rose 9 p.p. The market matured internally.

SECTION 3

Consumer Profile

Dimension	2025	vs 2021
Female	66%	▼ from 71.3%
Main age group	40–59 yrs	Slight rejuvenation
Postgraduates (master+)	62%	▲ from ~29% — significant increase
Civil servant / Self-employed	45%	New data point in 2025
18–29 years old	14%	Under-represented — opportunity

62% are postgraduates: significant increase vs 2021. High education confirms sustainability engagement, but indicates the market still needs to reach new social segments.

SECTION 4

Price Perception & Certification

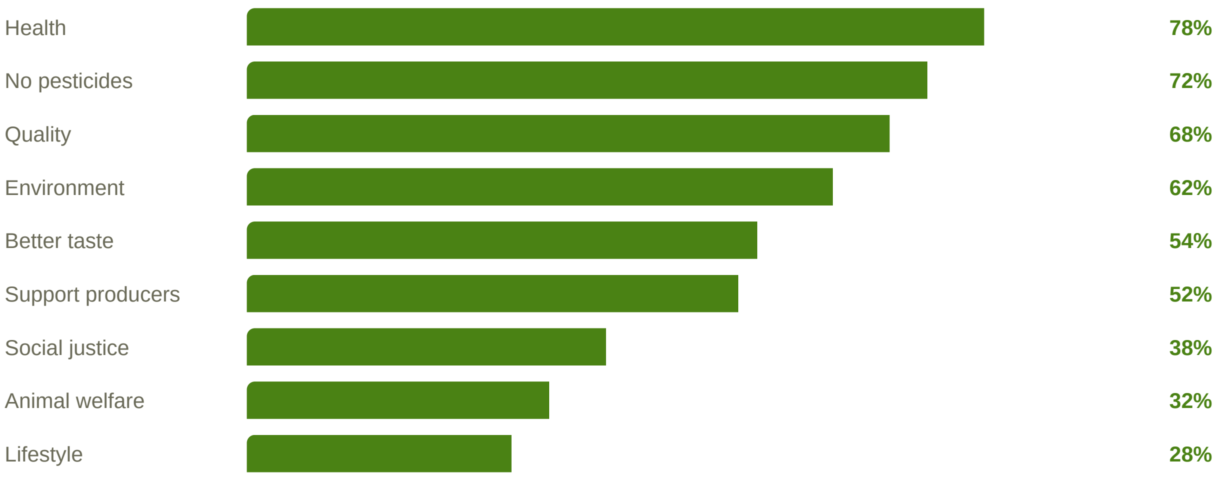
Question	2025	vs 2021
Organic prices are fair	32%	▼ from 36%
Prices could be lower	40%	▲ from 31%
No opinion on biodynamic pricing	12%	▼ from 30% — sharp drop
Value SisOrg label (score 4–5)	82%	▲ from 78%
Value Demeter label (score 4–5)	66%	▼ from 73%
Perceive org. vs conventional difference	~85%	New indicator
Perceive bio. vs organic difference	~52%	Divided perception

Food inflation impacts perception: those wanting lower prices rose from 31% to 40% in 4 years. Price is not a rejection signal — it is an access barrier.

SECTION 5

Consumption Motivations

Top reasons to consume organics in 2025 (% of mentions):



Taste rises to 5th place: it ranked 9th in 2021. The organic value proposition now includes sensory experience. Gastronomic and culinary positioning gains strategic relevance.

SECTION 6

Barriers & Beliefs

Barriers to biodynamic adoption (organic-only consumers):

Respondents' beliefs (2025):

Statement	Yes	Maybe	No
Healthy soil produces better food	94%	4%	2%
Plants are influenced by the cosmos	52%	28%	20%

Price as barrier doubled: from 13% (2021) to 28% (2025). At the same time, unawareness fell — meaning the barrier has shifted in nature, from educational to economic.