



ORGANIC CONSUMER RESEARCH STUDY 2014

July 2014

Report

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EXECUTIVE SUMMARY

The market for organic produce has, in some ways, bucked the recessionary trend. Activity in the market has grown, due to a number of factors, such as greater availability in stores, wider availability of a range of products combined with issues surrounding non-organic produce in recent times. However, there is a sense that a proportion of organic purchasing is being driven by negative perceptions associated with non-organic rather than an inherent desire to buy in to the organic lifestyle and principles. It will be important for organic producers to emphasise the positive reasons for buying organic, particularly among those who are more occasional buyers.

Currently consumers are not clear on who is responsible for ensuring that organic products genuinely conform to the principles of organic farming. Shoppers mainly rely on the word organic for reassurance that they are buying authentic organically produced food and drinks. The presence of the EU leaf logo in a more prominent manner would also help in this regard.

Shopping for organic in the main is not a planned event, but typically more occasion driven (treat inspired) or opportunistic based on what is available and visible in store. Due to the fragmented spread of organic products, shoppers report some levels of difficulty in locating the products they are looking for in the retail environment. Therefore stand out and packaging is critical to driving purchase in store.

Buying Irish is an important consideration for Irish shoppers, as is buying local, to a lesser extent. However, buyers of organic food and drink recognise that it is not always possible to buy Irish organic. While the positioning of “local organic” is appealing to current buyers, imported organic products are not a deterrent to purchase.

There are two segments of the housekeeper population identified where there is real potential to increase frequency and volume of purchasing of organic products. Together, they account for 37% of all housekeepers. These Passionate and Engaged segments, while slightly different in their attitudes towards organic, both share similar values when it comes to food. Two platforms which should be considered in communication or promotion to these segments include buying organic as a treat or reward, and buying organic because it makes me feel good about the food I am eating. Beyond this, the opportunity to encourage non-buyers to engage in the organic market is more limited, due to two significant barriers; price and lack of belief in the organic concept.

RESEARCH OBJECTIVES

This report examines the organic market primarily from a consumer perspective and is based on a programme of research developed between Bord Bia and Ipsos MRBI. This report builds on two previous consumer studies carried out in 2008 and 2010, as well as a qualitative review of trade attitudes to organic, conducted in 2012/2013.

The primary research objectives of the current research were as follows:

- To develop an understanding of consumer attitudes and behaviour with regards to organic produce
- To establish any trends and developments in consumer interaction with organic since the first major research was conducted by Ipsos MRBI in 2008.
- To understand the impact of the recession on propensity to buy organic.
- To build a profile of organic purchasers, and segment these purchasers on the basis of demographics and attitudes.
- To explore opportunities for the industry to promote organic effectively.

More specific objectives included:

- To measure incidence and recency of buying organic products and categories
- To see how consumers define the term “organic”
- To understand the retail experience when shopping for organic
- To explore the importance of local, origin, and labelling with regards to organic produce.

RESEARCH APPROACH

The research incorporated a dual approach, employing both quantitative measurement and qualitative analysis.

Quantitative Research

Quantitative research was required to measure the market for organic, and to provide robust comparative data against which previous studies could be evaluated.

The quantitative research in 2014 consisted of a face to face survey of 700 housekeepers aged 18 or over. Interviewing was spread in a representative manner across the Republic of Ireland to ensure that all strata of Irish society would be included in the study.

In addition to the main sample, two additional booster samples were included. The first was a booster of 100 recent organic buyers. The purpose of this booster was to ensure that we would have sufficient numbers to conduct in-depth analysis of organic buyers in the research. The second booster was among the “new millennials”, that is housekeepers aged 22 - 30. An additional 50 interviews were conducted among this cohort of the population, in recognition of the importance of this emerging element of the population in a post celtic tiger era. This brings to 850 the total number of quantitative interviews conducted.

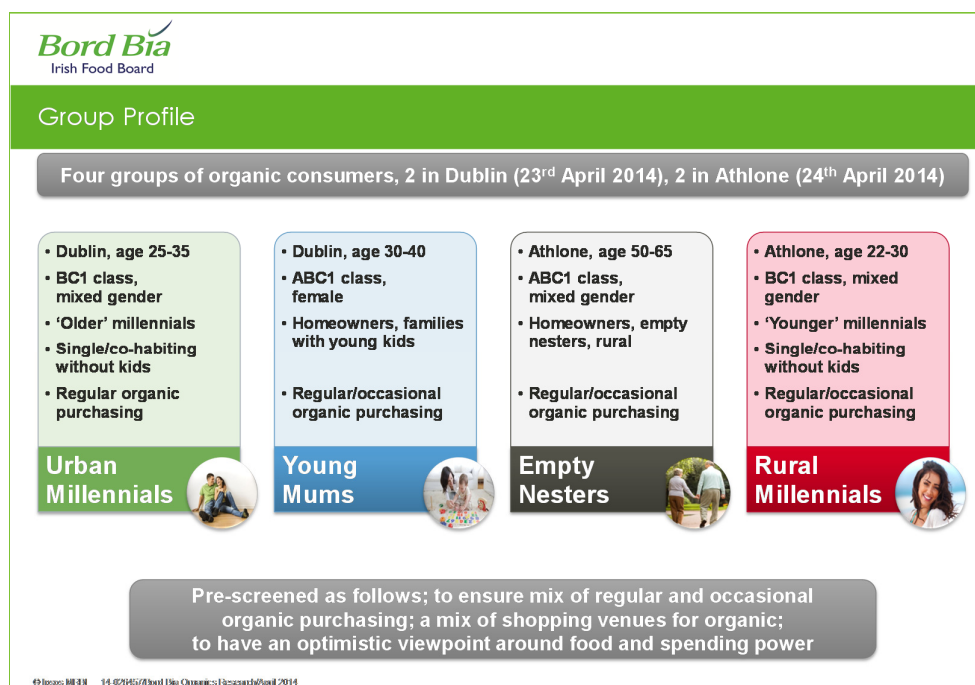
As a face to face survey, all interviewing was conducted in respondents’ own homes by experienced interviewers using the latest computer assisted interviewing techniques.

RESEARCH APPROACH

Qualitative Research

The quantitative research was complimented by a series of four focus groups, conducted in tandem with the statistical survey. The composition of the focus groups was designed to specifically explore the attitudes of those who interface with the organic category to some degree.

The structure of the group respondents is included below.



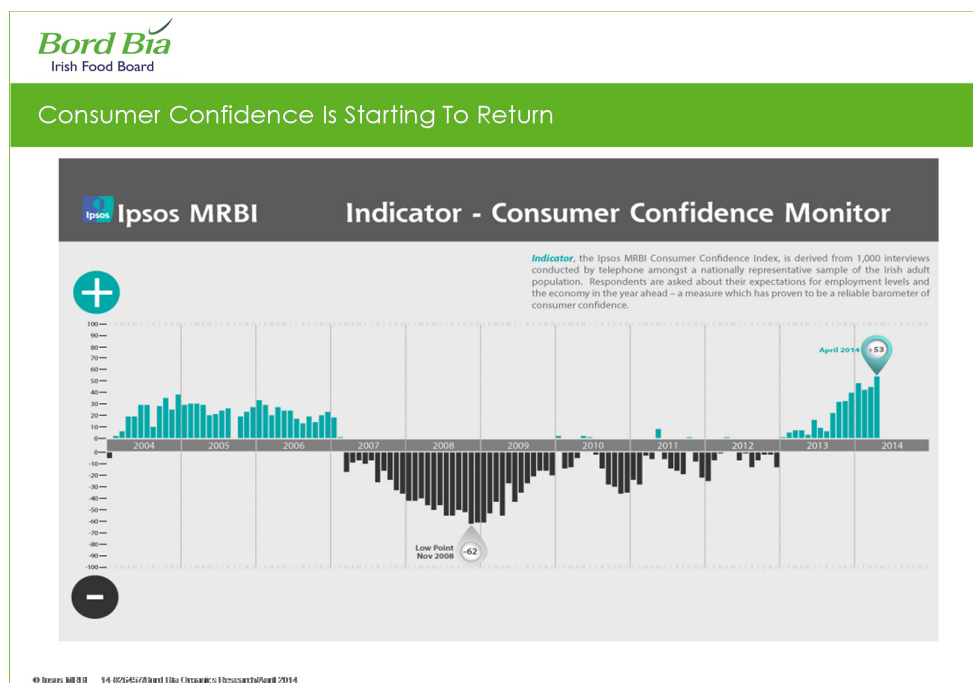
The research programme was conducted in April 2014.

For further information on this study, please contact Eileen Bentley in Bord Bia, or telephone 01-6685155.

THE IMPACT OF THE RECESSION ON CONSUMERS

The first time a comprehensive programme of research was conducted among consumers on the organic market was in 2008, at the zenith of the celtic tiger period. Immediately after the research was conducted (August 2008), the financial markets collapsed and the landscape of the world and local economy changed drastically. The macro trends and indicators told us we were living in a new world; one of recession, high unemployment, plummeting house prices and levels of emigration not seen since the '80s.

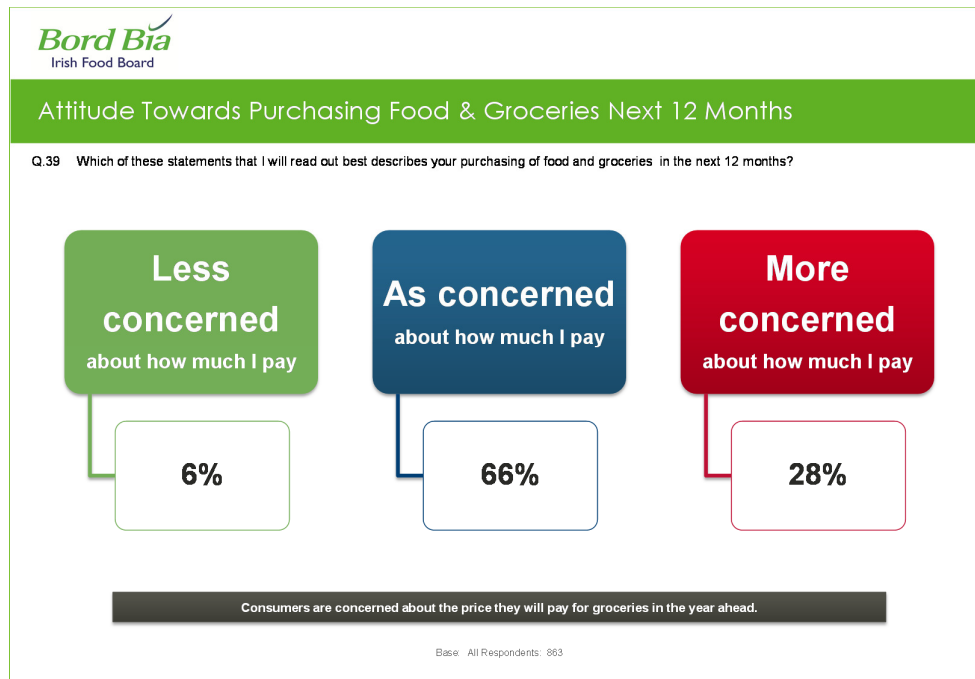
Ipsos MRBI has been tracking consumer confidence since the beginning of 2004. The trend in consumer confidence showed that as early as 2007, consumers were mindful of the potential unravelling of the boom years, as the UK property market had already shown signs of creaking from March of that year. By the end of 2008, consumer confidence was at its lowest ebb, and it would take until 2013 to finally begin to see some positive momentum in attitudes.



The retail trade has also undergone significant change during this period. Discounters such as Aldi and Lidl have capitalised on the need for price competition, with expansion in the number of outlets, and market share. And the growth of discounters has not just impacted in the grocery market. Ipsos MRBI has been tracking the Amenity market on behalf of Bord Bia since 2001, and over the course of a decade, the discounters have taken a significant slice of the market as consumers look for cheaper prices across the board.

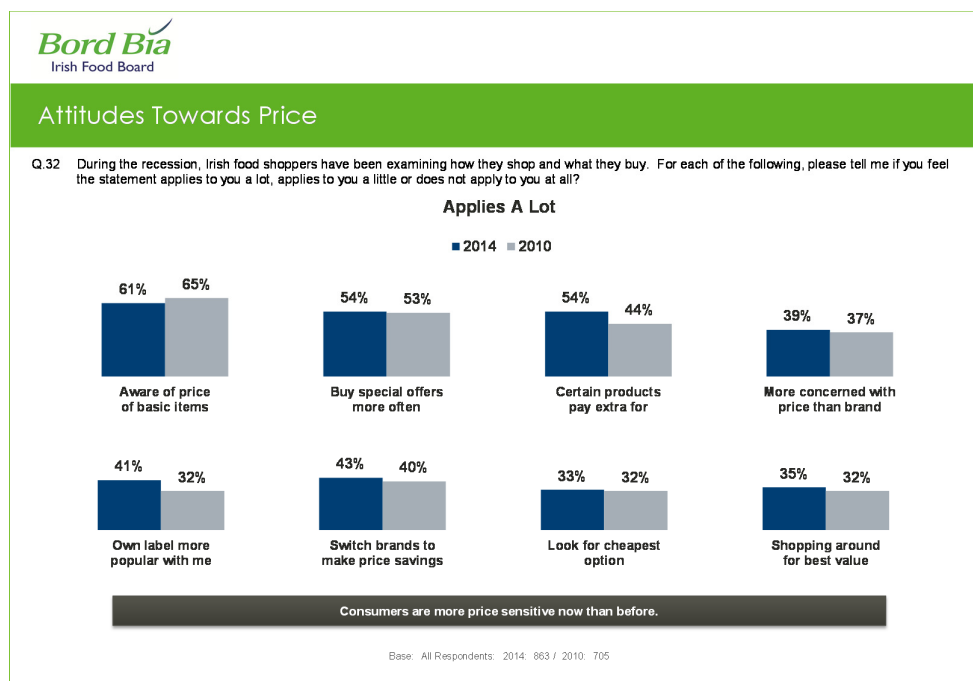
THE IMPACT OF THE RECESSION ON CONSUMERS

Consumer prices, particularly at the height of the recession, fell, in some cases, quite dramatically, and the food and drink sector was no exception. Consumers became extremely price conscious, and buying on promotion became the norm to maximise value. Indeed, the current research suggests that 28% of housekeepers will be more concerned about how much they pay for items in the next twelve months, whereas only 5% claim they will be less concerned.



THE IMPACT OF THE RECESSION ON CONSUMERS

More than a half claim to buy on special offer more often nowadays, and a significant minority will shop around for the cheapest option.

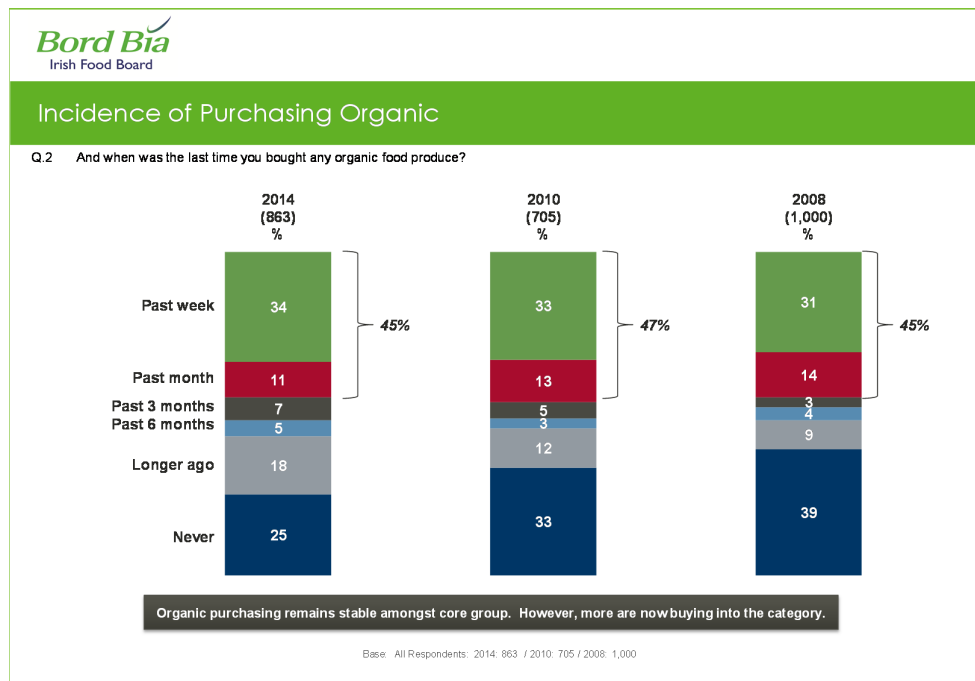


THE IMPACT OF THE RECESSION ON CONSUMERS

However, 2014 appears to be a year of some green shoots, as indicated by more positive tax returns in the first five months of the year by the government, allied with rising house prices, and growing car sales. All signs of a possible end to the recession.

So how has this impacted on the organic market?

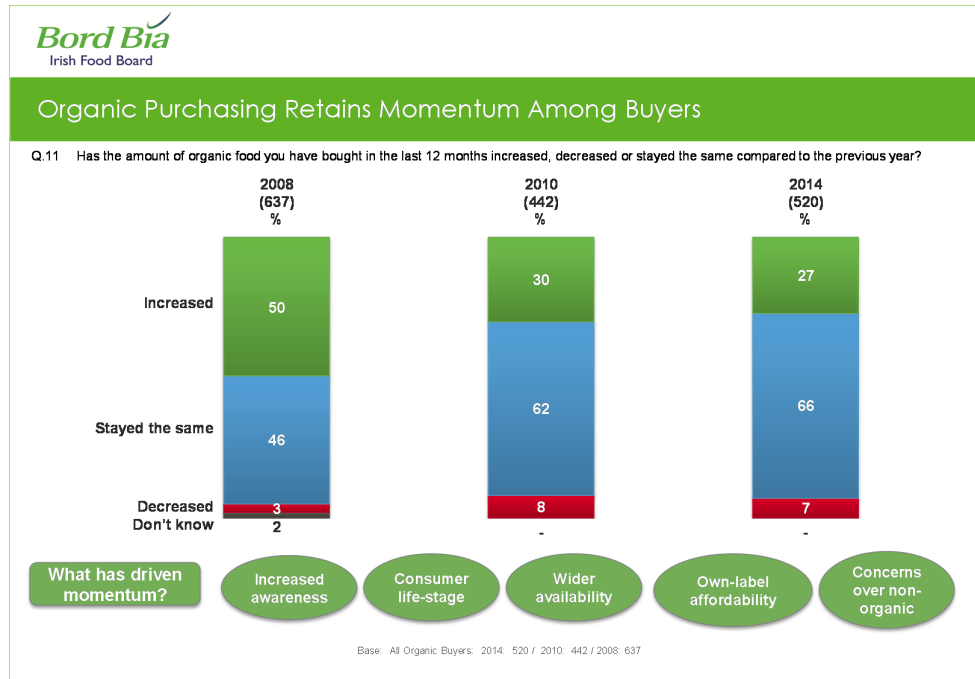
In spite of the recession, purchasing of organic produce has maintained its appeal among certain Irish consumers. Indeed, the incidence of having purchased organic food or drink in the past week has actually increased marginally since 2008. Furthermore, the proportion of housekeepers who reject the category (never buy) has fallen from 39% to 25% since 2008.



Growth in the market has primarily occurred among very occasional buyers, which have doubled since 2008. These are consumers who may be dipping in and out of organic to suit their particular needs at a given time (e.g. a particular brand which happens to be organic).

THE IMPACT OF THE RECESSION ON CONSUMERS

Not surprisingly, it is evident that the pace of growth in purchasing organic has slowed over this period. In 2008, 50% of those interviewed reported that the amount of organic food they were buying in the past 12 months had increased versus the previous year. In 2014, this figure had been tempered to 27%. However, this suggests that there is still positive momentum in the category.

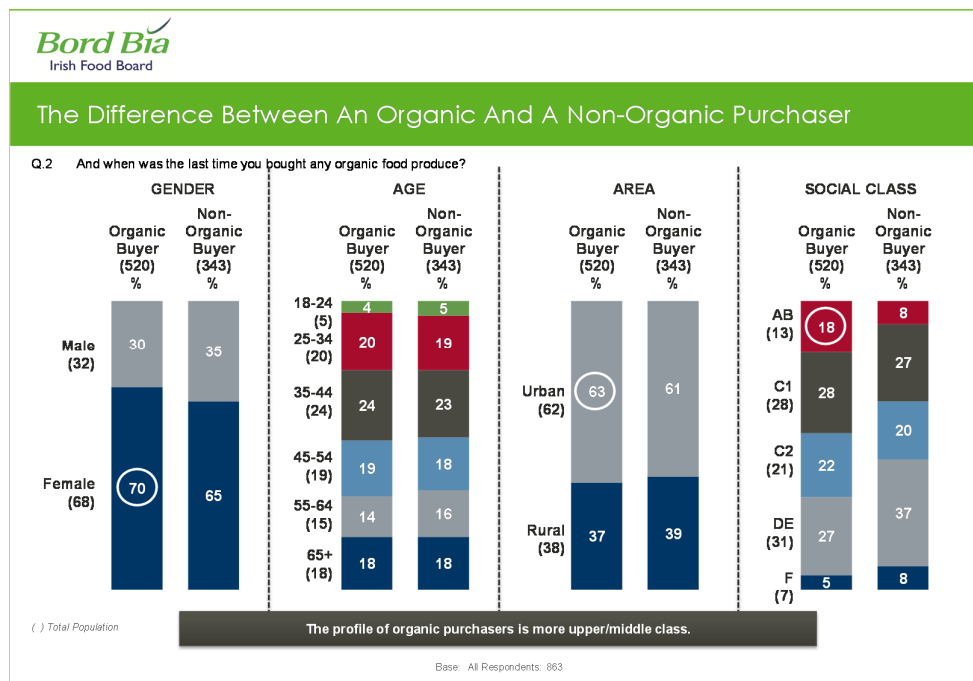


The growth in the market for organic has been driven by a number of factors, including increased awareness, greater availability and range of products, own label affordability, and also a sense of nervousness about non-organic food. For some, organic is the chosen option because of fear arising from recent food scares, and concerns about the origin and content of food products in general.

WHO ARE THE ORGANIC BUYERS?

In order for the industry to effectively target the current and potential organic purchaser, it is important to understand who the typical organic purchaser is, both in terms of their demographic make-up, and also in how they view the world.

Demographically, the factor which most discriminates organic buyers from non-buyers is socio-economic background.



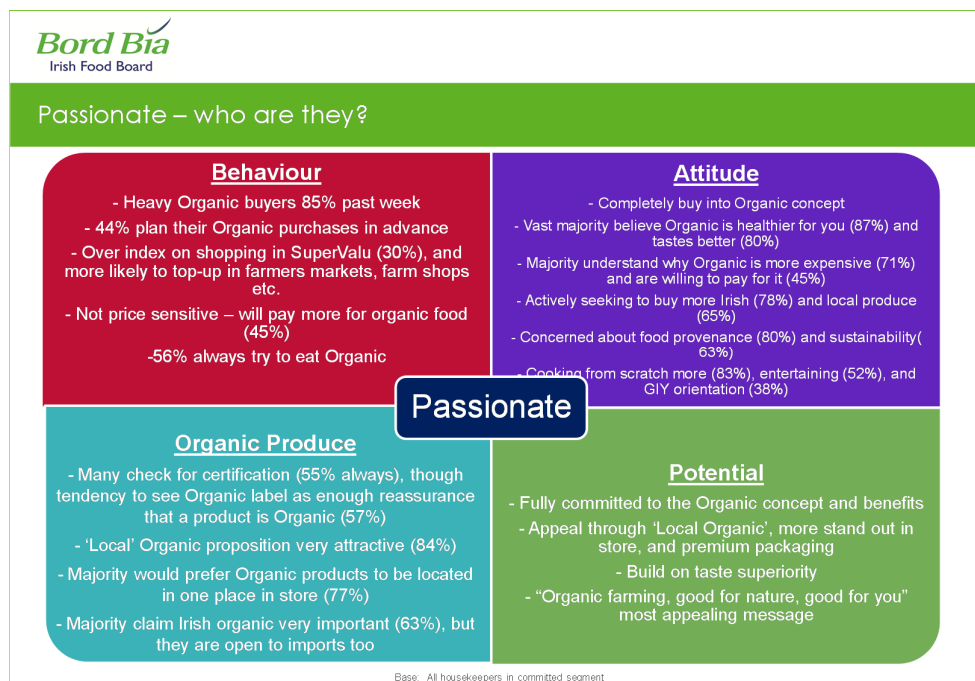
Not surprisingly, due to the perceived price premium commanded by organic produce; those with more disposable income are more likely to be in a position to purchase organic. However, it is important to delve into the attitudes which drive purchasers to understand how best to tap in to their motives and values to maximise the potential from these consumers.

WHO ARE THE ORGANIC BUYERS?

As part of the research, a segmentation analysis was conducted to identify any distinguishing factors which might divide the population in the context of organic food and drink. Five distinct segments emerged from this segmentation analysis. These are Passionate, Engaged, Casual, Accidental and Rejectors. Each of these segments is described in detail below.

Passionate

The segment termed Passionate makes up 24% of housekeepers. Passionates are demographically more likely to be female, hail from an upper middle class background (AB), and be aged 65 or over. Practically this entire segment has purchased organic produce in the past week. The Passionate segment are pro-active purchasers of organic food and drink. They tend to plan their purchasing, so know in advance of going shopping that they will choose an organic option. For this cohort, the separation of organic produce in store would be the preferred layout (77% would prefer a separate organic section), so that they can easily spot the products they are seeking. Passionates over-index on shopping in Super Valu.



WHO ARE THE ORGANIC BUYERS?

Attitudinally, the Passionate segment is unique from all other segments of the housekeeper population, in terms of commitment to the organic concept. 56% of this segment always tries to eat organic; they clearly align themselves with the principles behind organic production methods, and they understand that organic products are more expensive due to the cost of production. The vast majority (87%) of Passionates believe that organic products are healthier, and therefore better for you. Furthermore, this segment believes that organic food tastes better (80%) – a sentiment not shared by other segments. In addition, Passionates are actively concerned about food provenance and sustainability, so buying organic is a natural progression for them.

This segment represents a significant minority of the universe of housekeepers, and suggests that there is real potential to build on loyalty and commitment of this group.

Engaged

A further 13% of the population is defined as Engaged organic purchasers. These consumers are more middle aged, urban based but still more likely to stem from the AB upper middle class section of society.



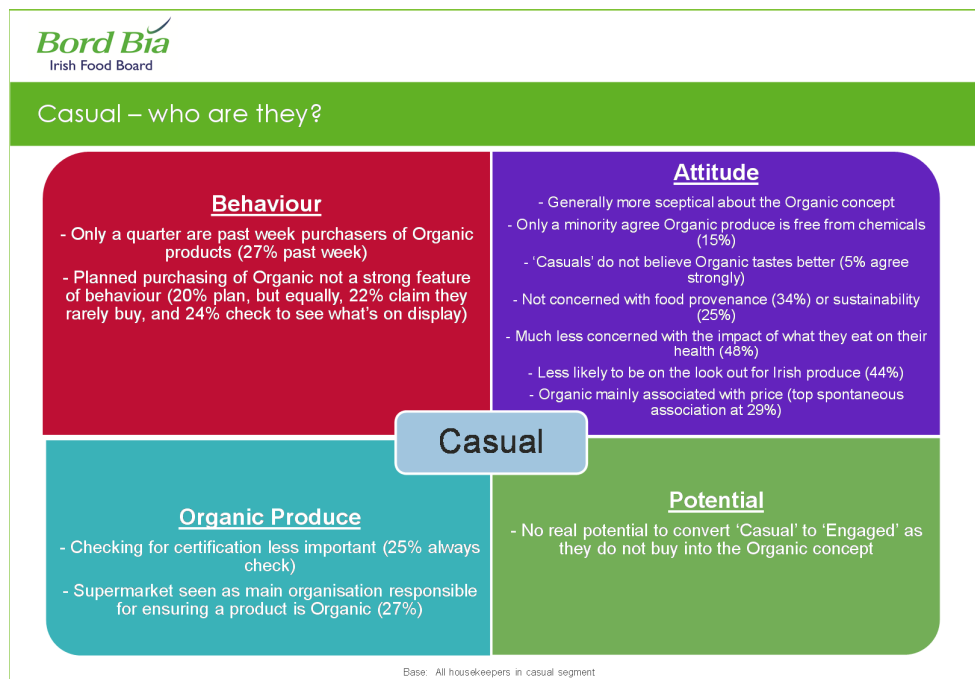
WHO ARE THE ORGANIC BUYERS?

The Engaged segment shares many of the beliefs and values of the Passionate segment, but with less conviction, particularly in relation to the concept of organic farming. While the Engaged cohort is equally convinced of the health attributes of organic food (82%) and they understand that it costs more to produce organic produce (72%), they are unwilling to pay a premium for this process. Generally, they are more price-sensitive and so the major attraction to expand their organic repertoire would be a price reduction. Currently, 48% of these consumers have bought organic produce in the past week.

There is certainly potential to target this segment on a health platform, as Engaged are very concerned about their health, and the impact of the food they eat on their health.

Casual

The Casual segment accounts for 20% of the market. Casuals are younger (more likely to be aged between 25 and 34), are also urban and tend to be more middle class (C1 social class group).



WHO ARE THE ORGANIC BUYERS?

While quarter claim to have bought organic in the past week, purchasing tends to be more infrequent. The key difference between this segment and its two predecessors is that Casuals are more sceptical about the organic concept. They do not subscribe to the principles that define organic (in fact, one wonders if they truly understand what organic means; just 15% claim that organic products are free from chemicals and pesticides). Therefore, they are more selective in what they buy, dipping in and out of the category when it suits them, or perhaps just for specific brands or products. Crucially, they are not overly concerned with food provenance and sustainability, so to focus on this target market would be largely ineffective.

Accidentals

Accidentals were one of two “non-purchaser” segments which emerged from the research. Accidentals (23%) are found across all social class groups but are more likely to be from working class backgrounds. Indeed, they are well represented in the farming group also.



A third of this cohort has never bought organic, and the vast majority (85%) claim they are unlikely to do so in the future. Price is the significant deterrent to buying organic food. Accidentals are sceptical about organic claims. Indeed, almost a quarter (23%) believes there is no difference between organic and non-organic produce.

WHO ARE THE ORGANIC BUYERS?

Rejectors

The final segment, Rejectors are of a similar mind-set to Accidentals. They are out and out rejectors of organic, and have little interest in food in general.



Rejectors account for 20% of the housekeeper population. Even a price reduction would not encourage this segment to engage with the organic category.

ORGANIC AND NEW MILLENNIALS

The “new Millennials” are the next generation of shoppers to emerge. This research found that this group, aged 22-30 year old housekeepers, were not particularly engaged with organic products.

Indeed “new millennials” are not particularly evolved when it comes to decisions regarding food. Their shopping behaviour for organic is far less planned, with a significant minority buying on impulse.

“New millennials” are spread across all of the organic segments, but are slightly more prevalent among the Accidentals and Rejectors. As such, it is not surprising that “new millennials” are more likely than average to have purchased include the non-mainstream categories (over indexing on snacks, fruit juices, smoothies, bread, soups, bananas and mushrooms). They are also much less likely to check packaging to see that a product has been certified organic (43% never check).

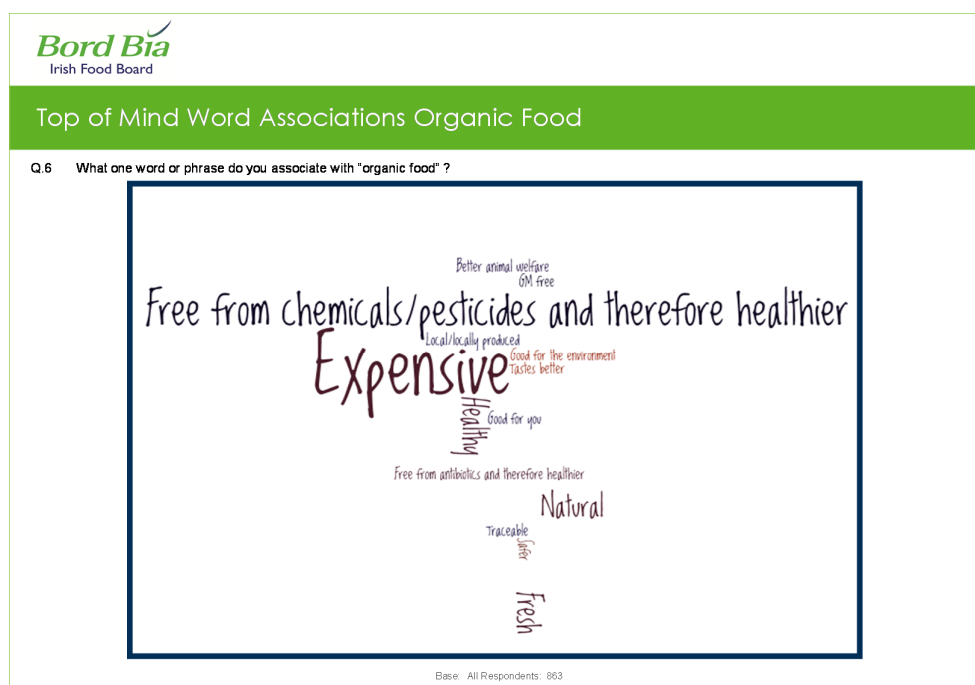
Millennials are not as concerned as housekeepers generally about the origin of their organic produce, they are much less likely to be concerned about buying imported organic food.

The qualitative research supported this positioning of “new millennials” in relation to organic food. Therefore, education of this market is important to encourage future purchasing as they enter the young family lifestage (when organic first comes to the fore). At present, presentation of organic products in-store (visibility and packaging) is what will attract purchasing, due to the spontaneous nature of shopping patterns.

DEFINITION OF ORGANIC

What comes to mind when consumers think of the word organic nowadays?

The over-riding spontaneous association linked with the term organic, not surprisingly, is “expensive”. However, when price is taken out of the equation, there are good levels of awareness of what organic means; “free from chemicals and pesticides and therefore healthier” is the most commonly associated phrase with organic. Interestingly, links between organic and “free from antibiotics and therefore healthier” ranks much further down.

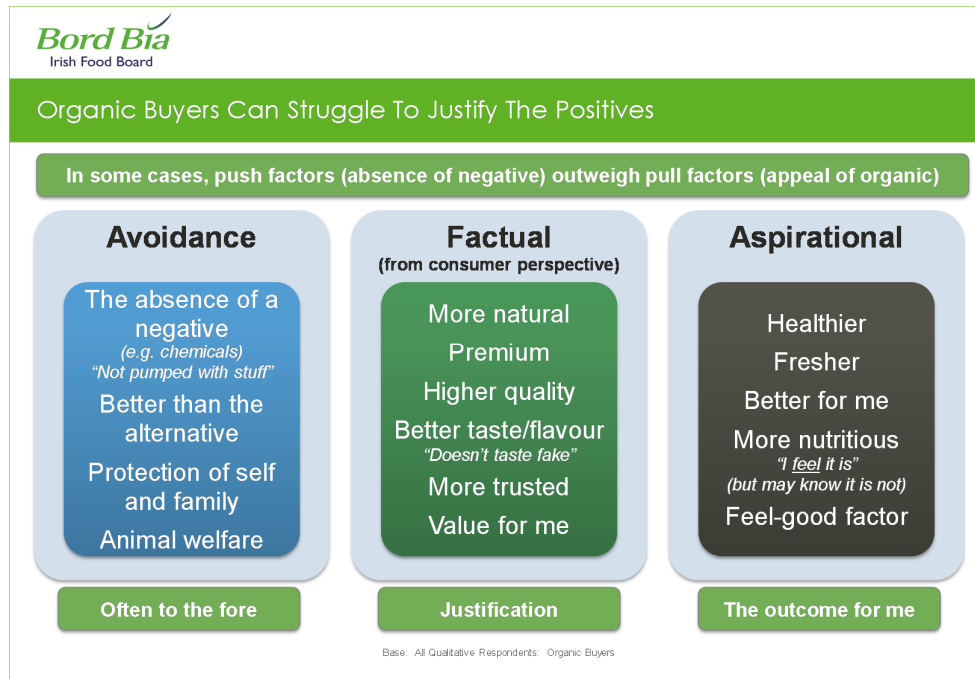


Terms such as Healthy and Natural are more likely to be linked with organic produce. The research indicated a lack of real passion or concern for issues such as animal wellbeing.

The illustration below demonstrates the strength of the association between organic and price (the greater the link, the larger the type size), and the relatively strong association between organic and “healthy” and “natural”.

WHAT MOTIVATES CONSUMERS TO BUY ORGANIC?

Reasons for buying organic falls in to three broad categories: Avoidance, Factual, and Aspirational.



Avoidance was described as "the absence of a negative", which was often to the fore when consumers were rationalising their reason for choosing an organic option. Organic was seen to be better than the alternative in many cases, thereby avoiding the trappings of modern farming techniques (e.g.: use of antibiotics, hormones and chemicals). In addition, the recent food scares are also pushing consumers away from non-organic options. Interestingly, even within the regular organic consumers in the qualitative research, consumers appeared to be "pushed" towards organic, rather than actively choosing organic due to a passionate belief in the benefits of organic farming.

WHAT MOTIVATES CONSUMERS TO BUY ORGANIC?

Another reason for choosing organic was the facts associated with organic; it is perceived to be the more natural and healthier option. Interestingly, for the passionate organic segment in particular, taste is a real benefit for organic; however, this is not shared by non-organic purchasers.



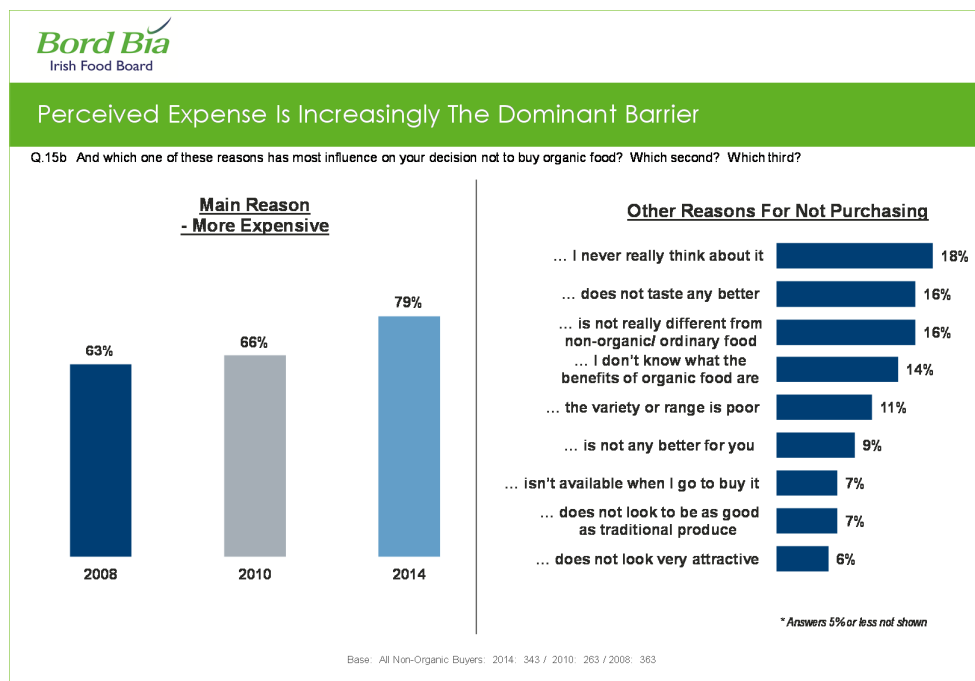
Respondents often struggled to find positive reasons to justify their organic purchasing; however, one motivator which should not be ignored, and indeed, may well be the key to engaging consumers in to the category, are the aspirational factors which drive purchase. Purchasing organic is associated with positive cues, such as “more nutritious”, “better for me” and “healthier”, even though on probing, consumers know that these claims cannot be substantiated.

“I just think it’s healthier” (Urban Millennial).

Nonetheless, organic delivers a feel-good factor, and rewards them for choosing the more natural option. These aspirational drivers resonate with both Passionate consumers and those in the Engaged segment.

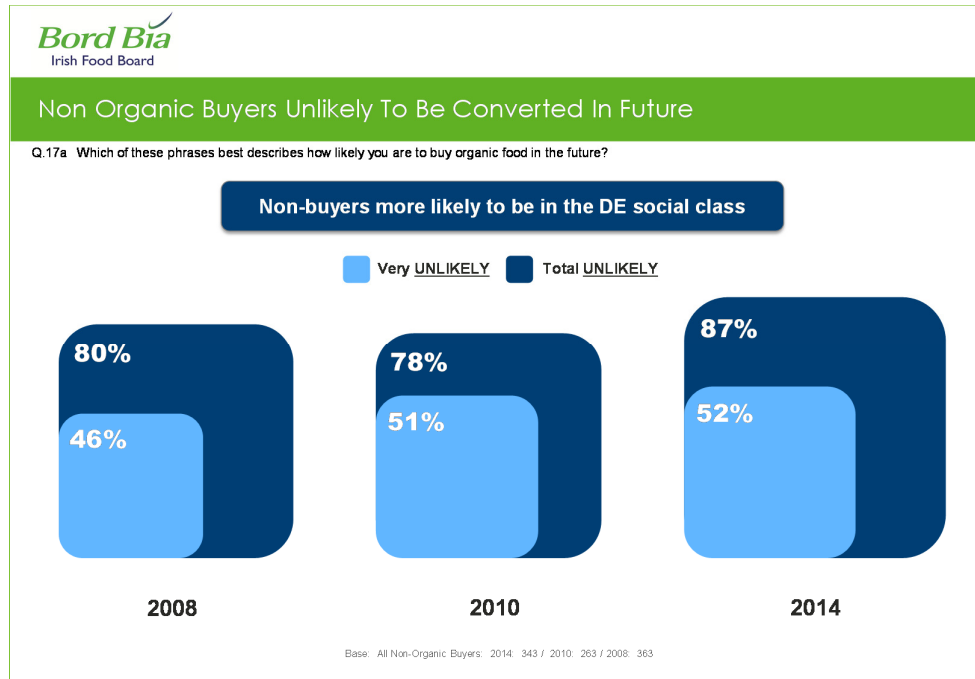
BARRIERS TO PURCHASING ORGANIC

The primary barrier to buying organic is price. Buyers and non-buyers alike recognise that organic produce commands a price premium. For the Passionate segment, consumers are willing to pay this premium because they appreciate the expense associated with organic production. However, other segments are more price-sensitive. Even those in the Engaged segment claim that while they understand that organic farming means higher costs, they are not willing to pay the premium attached. So supporting the principles and ethos of organic farming alone is not enough of a motivator to attract this segment.



At the other end of the spectrum, organic is dismissed out of hand, primarily on the basis of price. However, Accidentals and Rejectors are not convinced of any difference between organic and non -organic, and therefore, organic holds no attraction to them.

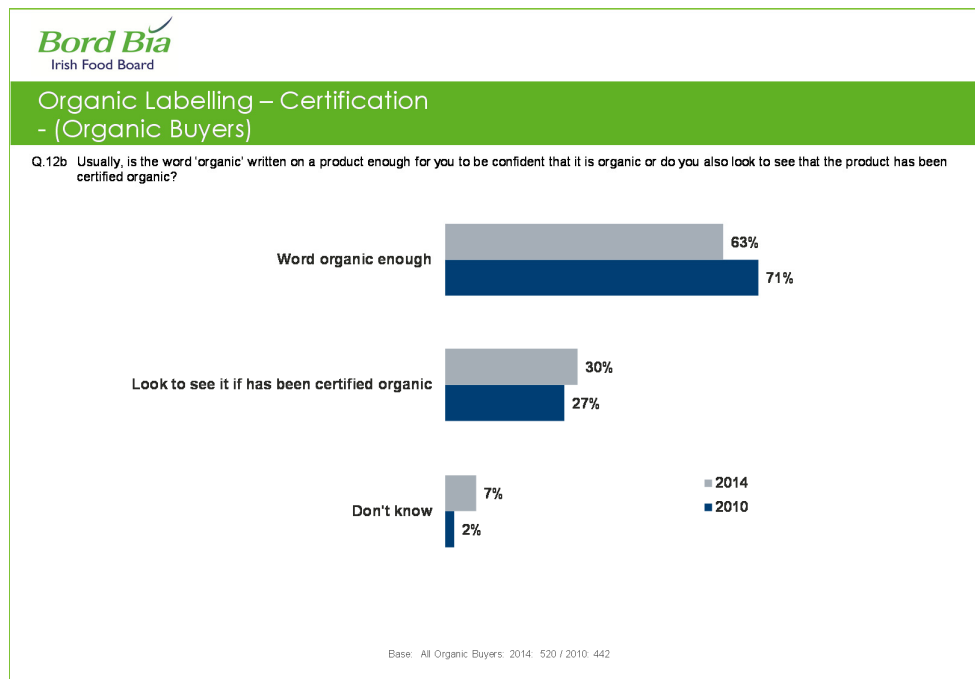
BARRIERS TO PURCHASING ORGANIC



The vast majority of non-buyers of organic claim they are unlikely to buy organic in the future.

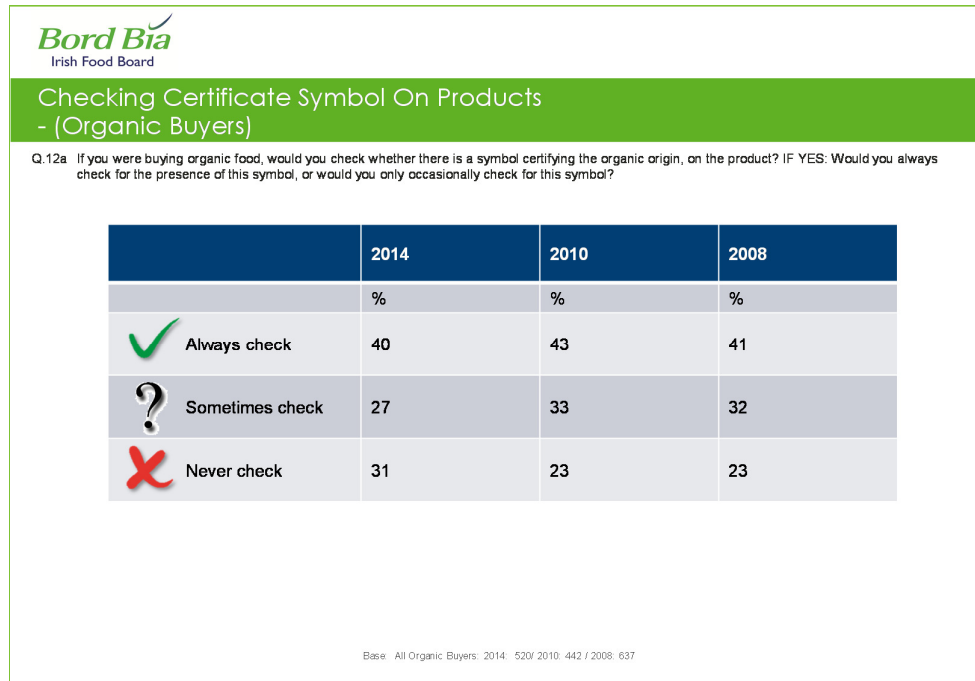
ORGANIC LABELLING AND PACKAGING

The majority of respondents rely only on the word organic to re-assure themselves that the product they are buying is indeed organic. Shoppers tend to take the label “organic” at face value, and qualitatively, consumers spoke about “degrees of organic”, as some were unsure how any product can be truly verified as organic.

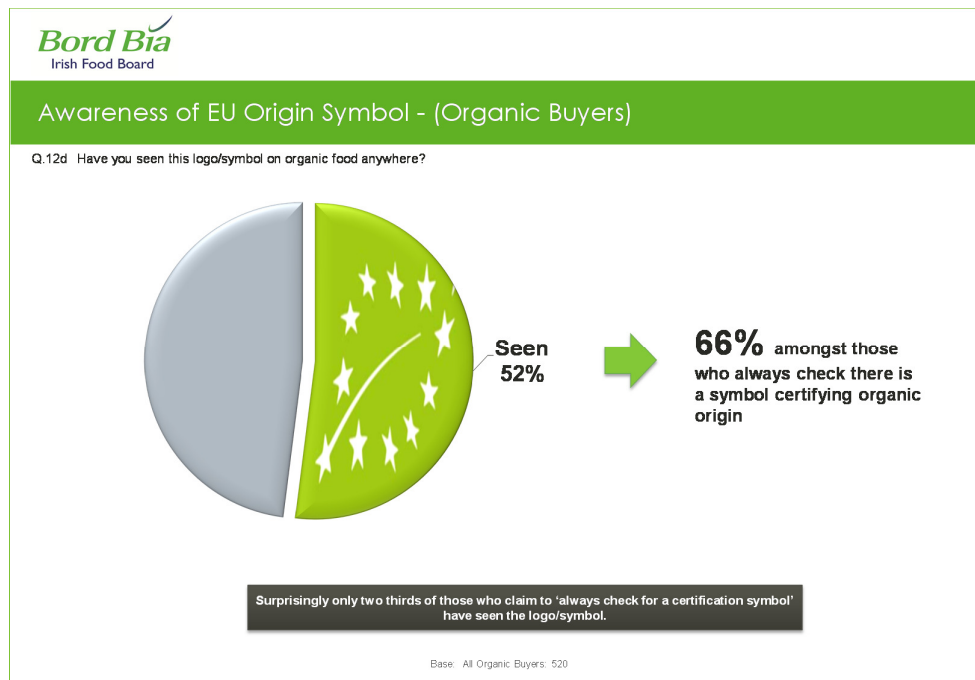


Overall, just 3 in 10 claim they check to see if a product has been certified organic. More than half of organic buyers only occasionally or never check for an organic certification symbol on organic products.

ORGANIC LABELLING AND PACKAGING



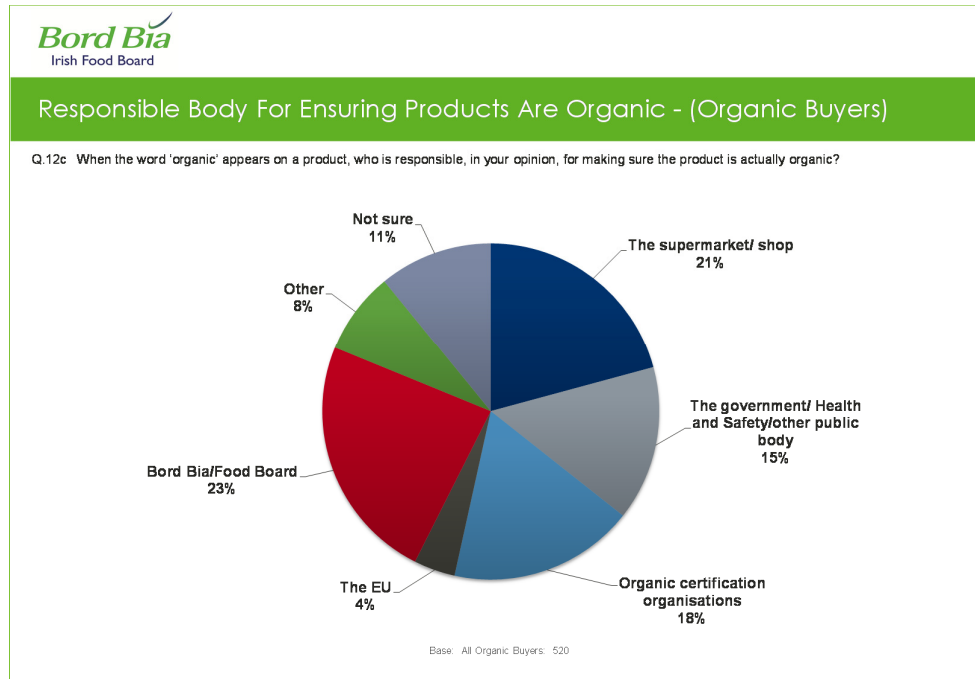
While just over half (52%) of organic buyers claim to have seen the EU leaf symbol before, anecdotal evidence from the focus groups suggests that there may be some confusion with regards to the “leaf” symbol, due to its generic EU format.



This symbol also tends not to be prominent on organic food packaging.

ORGANIC LABELLING AND PACKAGING

There is certainly confusion among consumers over which body or organisation is, or should be, responsible for ensuring the authenticity of organic products. Almost a quarter of those asked suggested that Bord Bia should be responsible, while 1 in 5 attributed this role to supermarkets. A further 18% believed that this was the function of an organic certification body, and just 4% nominated the EU in this regard.



It is clear that there is a lack of clear devolution of this role, and as such, there would be merit having more prominent and consistent proof of certification to provide re-assurance to consumers.

Packaging of organic produce emerged as a significant area of opportunity for organic food and drink. Currently, there is great discrepancy over the packaging “look and feel” of organic compared with the non-organic equivalent.

ORGANIC LABELLING AND PACKAGING

In the quantitative research, a simple exercise was carried out to establish the reasons for choosing organic over non-organic across three items of fresh foods: carrots, eggs and mince. In all cases, the majority of organic buyers chose the non-organic option. For those who chose the organic option, the reasons cited were consistent with the organic message of “free from”. And value for money/price was the main reason for choosing the non-organic option. However, some organic purchasers chose the non-organic option because the non-organic product was perceived to look better. None of the cues associated with organic (e.g.: better quality, more natural, better for me etc.) were reflected in the packaging for these food items, thus highlighting the importance of packaging in promoting organic products.

Likewise, sample packaging displayed in the qualitative research demonstrated the importance of visual cues. An example of this pertained to two packs of four apples; one own label and one organic. The own label apples were perceived to “look” organic, because the apples were arranged in a cardboard tray lengthways, rather than in the traditional 2 x2 format. There was a further example of a bag of organic potatoes presented in a paper bag. Immediately, respondents were drawn to the product; not only was the packaging attractive, but practical as well.

“You could have that in your kitchen on show”. “It’s easy to use, you could cut the top off it, they go all over the place in those plastic bags” (Urban Millennials).

Their perception was that more care had gone in to the product and its presentation. To organic buyers, this reflected the greater effort which is involved in organic farming.

ORGANIC LABELLING AND PACKAGING


Bord Bia
Irish Food Board

Organic Brands & The Importance of Packaging

Surely Organic Is Organic?

- Most claim that the organic label is more important than the brand (with an inherent trust in organic labelling)
- Absence of strong recognition for most organic brands – some brands not exclusively organic which can confuse, while most spontaneous brands are from overseas
- Buying own-label organic is generally acceptable

"The brand is not important – organic is organic" [Young Mum]




Visual Cues Can Influence

- Sample packaging in focus groups demonstrated the importance of visual cues, e.g. branded vs. own-label organic vs. non-organic (distinctive vs. homogenous)

"You could have that in your kitchen on show" / "There's more care put into it" / "It's easy to use, you could cut the top off it, they go all over the place in those plastic bags" [Urban Millennials]

- Although the apples on the left are organic, the apples on the right are perceived to 'look' more organic (in cardboard sleeve)

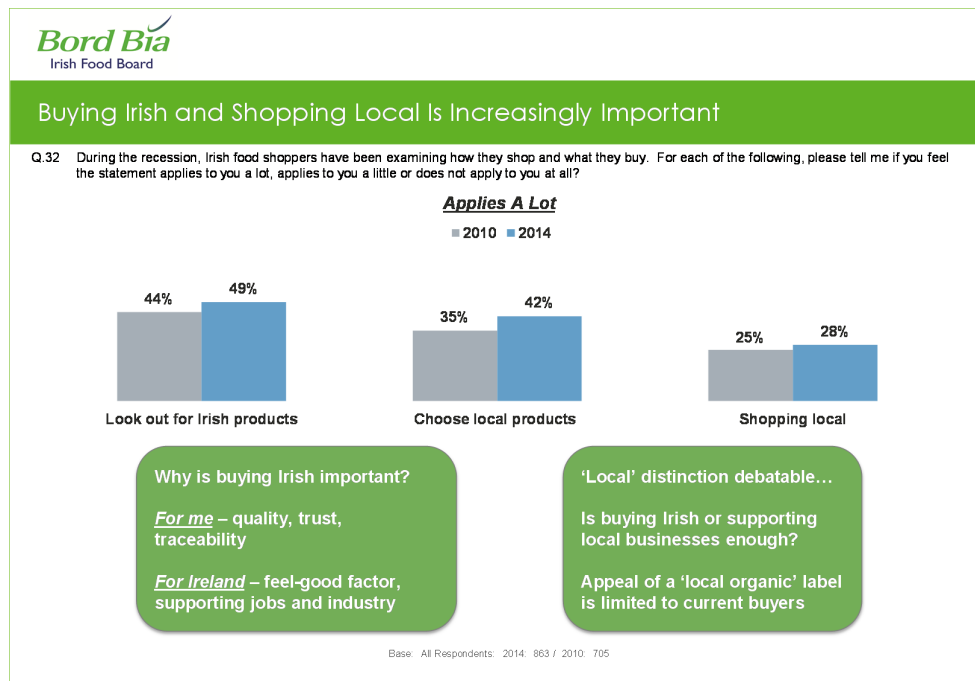


Base: All Qualitative Respondents: Organic Buyers

There is no doubt that expensive packaging of organic food will act as a deterrent to some consumers on the basis of perceived cost, but these consumers are unlikely to be engaging with organic food anyway. Strong visual cues, however, could be very powerful in attracting and engaging those who are willing to pay a little bit more for what they perceived to be better quality, more natural and healthier food.

BUYING IRISH, LOCAL AND ORIGIN

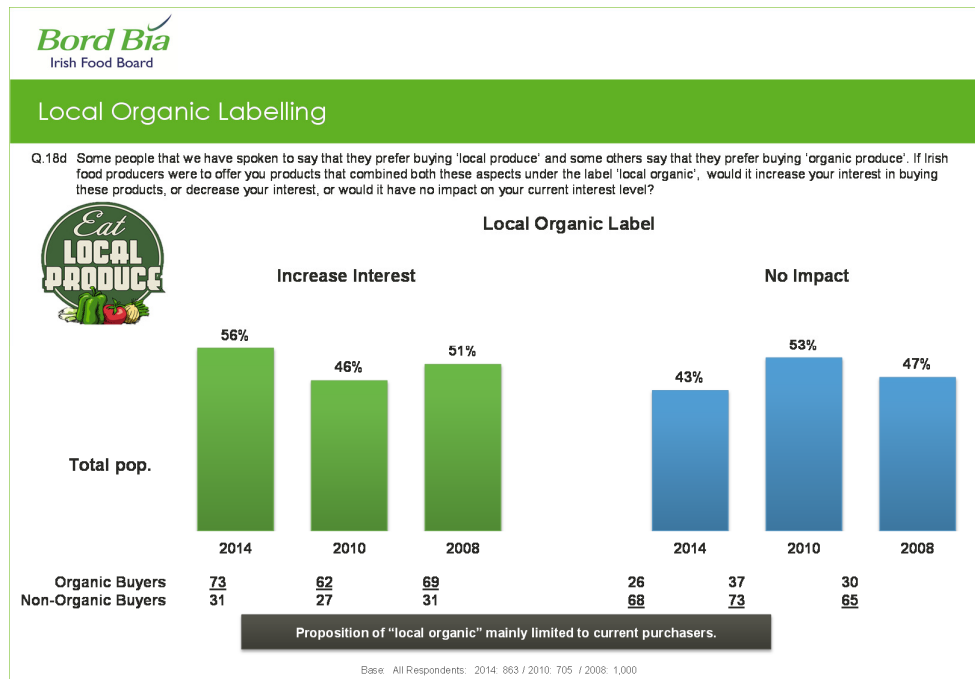
Buying Irish and supporting the Irish economy has become increasingly important as we progress through the recession. Half of Irish housekeepers claim they look out for Irish products, and 42% claim to choose local products when they are available.



There are some blurred lines between buying Irish and buying local, however. Consumers buy Irish for two primary reasons: because they trust Irish produce to have higher quality, and traceability, and because buying Irish helps support the economy. Buying local is a less coherent proposition. It may mean buying produce from the farm-gate down the road, or it may mean supporting your local butcher in the village (where the produce may be either Irish or imported).

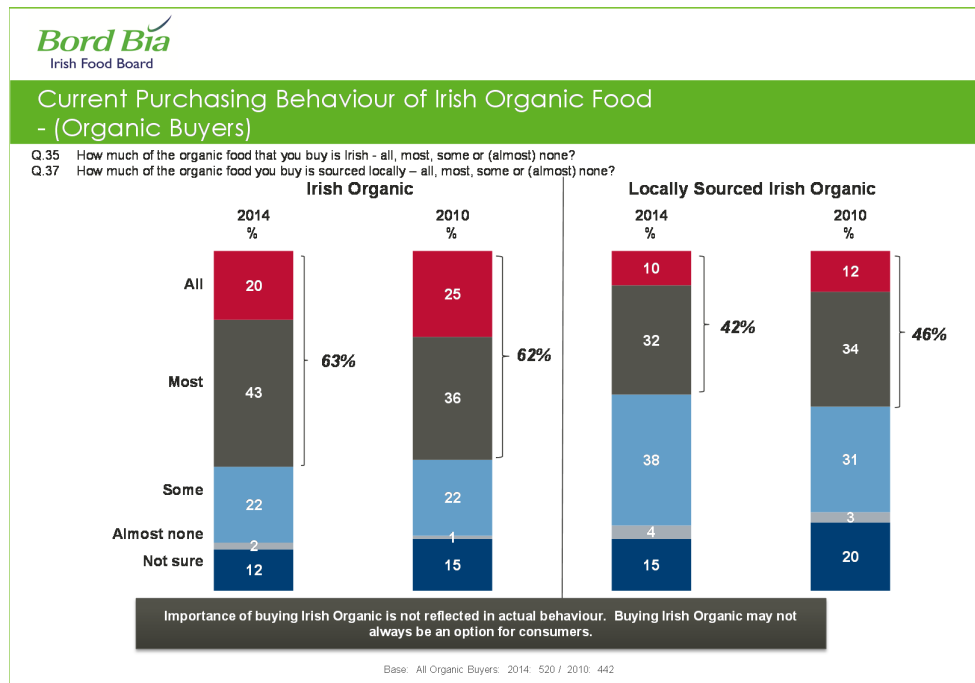
BUYING IRISH, LOCAL AND ORIGIN

In this context, the viability of a local organic label is really only of interest to current organic buyers, where 73% claim it would increase their interest in organic.

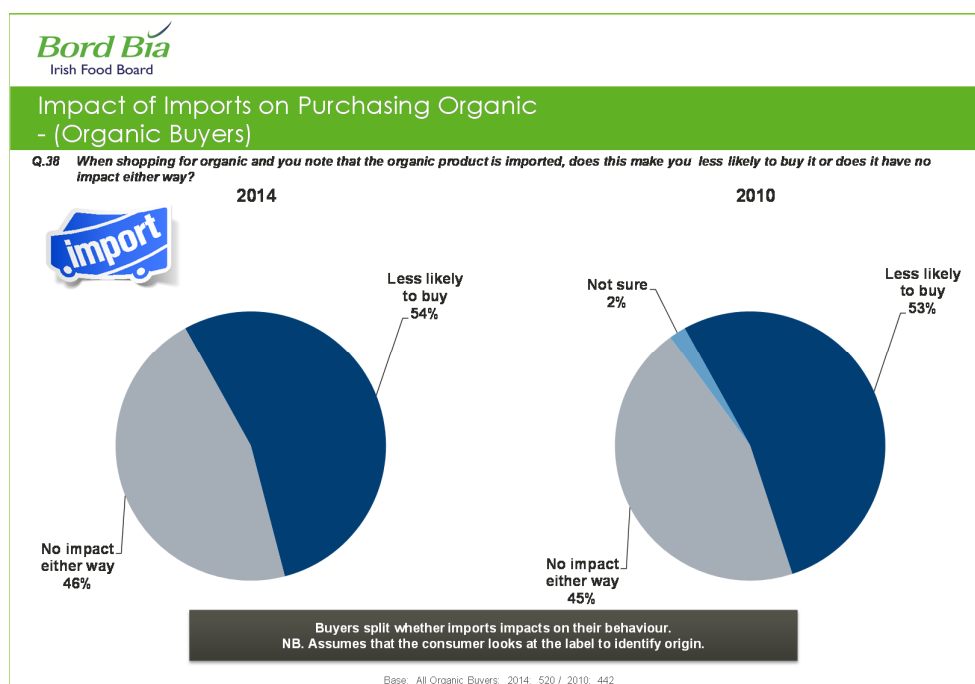


Not surprisingly, a significant 1 in 2 organic buyers claim that buying Irish produced organic food is very important to them and this has increased marginally since last measured in 2010. However, organic buyers are rather sanguine about their organic purchasing. They recognise that the products that they want to buy may not be produced in Ireland, and therefore, a quarter report that either only some or none of the organic products they buy are Irish organic, and an even higher proportion – 4 in 10 – concede that only some or none of their organic purchases are local organic.

BUYING IRISH, LOCAL AND ORIGIN



Imported organic produce is not necessarily a deterrent to buying organic. Assuming that the shopper has checked to see the origin of production (which is known to be inconsistent), about half claim that an imported product would make no difference to how likely they are to buy that product.

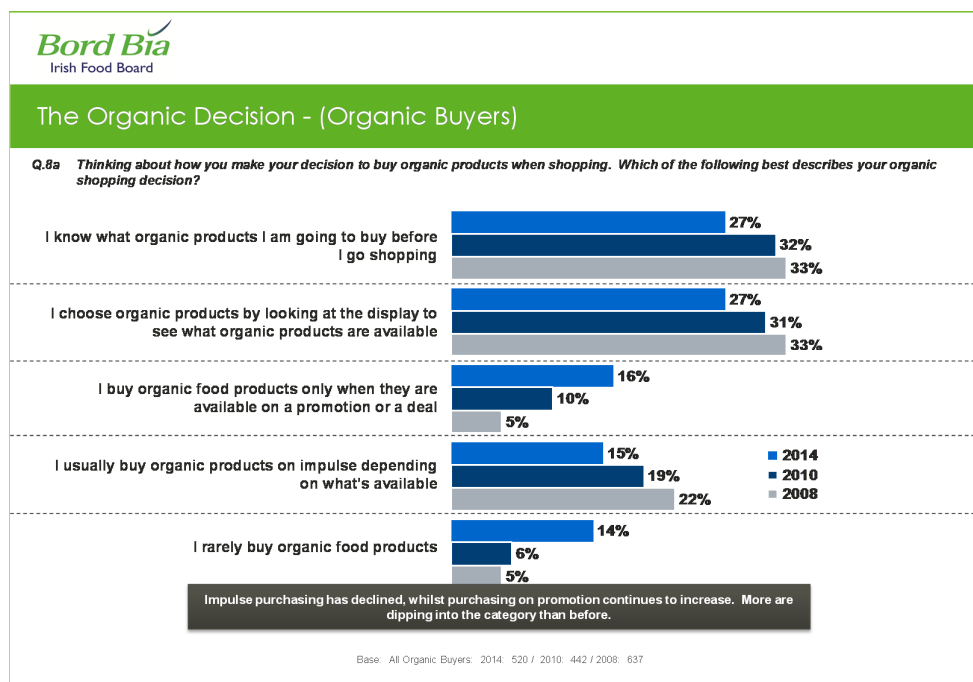


SHOPPING FOR ORGANIC

For the vast majority of Irish shoppers, buying organic produce is not a committed lifestyle choice. Rather it is a fragmented, opportunistic, or occasion driven experience. At an overall level, only 27% of shoppers know what organic products they are going to buy before they go shopping, but for the rest, the decision is made in store.

“You decide when you’re there ... it depends on your wallet” (Rural Millennial)

A significant proportion of shoppers buy on impulse, or by looking at the displays and seeing what attracts their attention. A growing number (16%) are claiming to only buy organic when it is on promotion or on a deal.



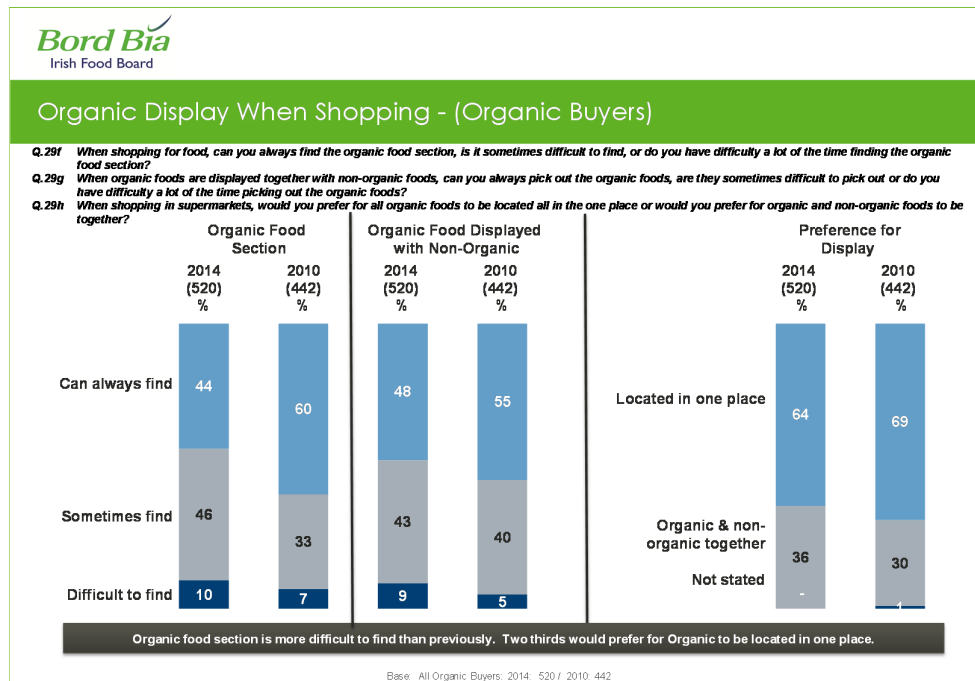
Factors influencing whether an organic product is chosen or not may include available funds or buying for a particular occasion. Because in the majority of cases the purchase decision is made in store, the layout and presentation of organic products is vital. Currently, just 44% of organic shoppers claim they can always find the organic food section in store, down from 60% in 2010.

“It’s in a pokey little corner” (Rural Millennial)

Similarly, when organic and non-organic items are displayed together, 43% claim they can only sometimes find the organic option they are looking for. This has increased from 40% in 2010.

SHOPPING FOR ORGANIC

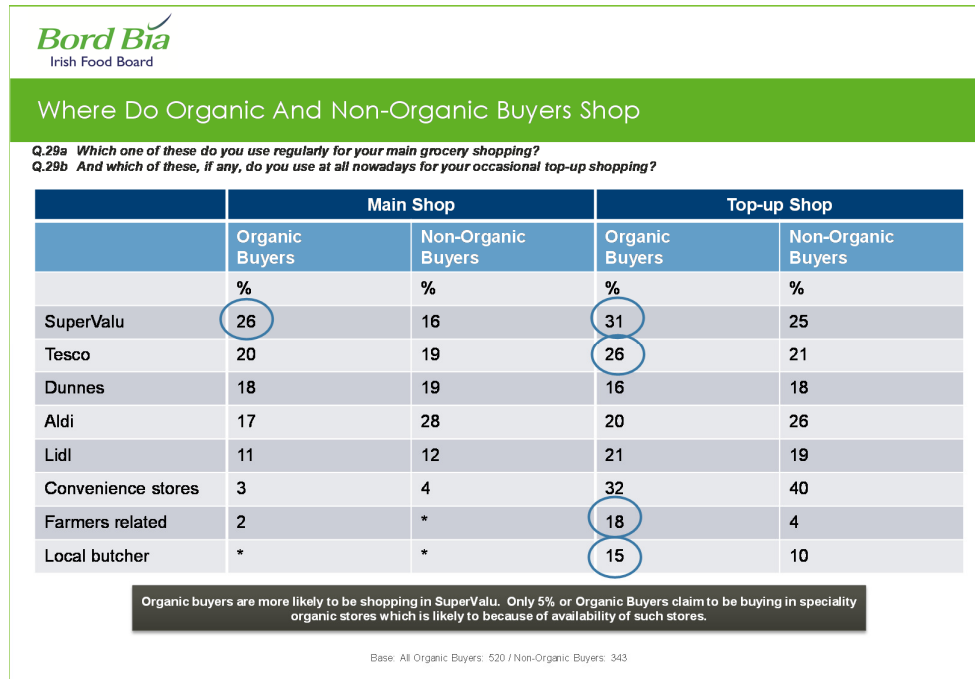
Not surprisingly the majority of organic buyers would prefer all organic foods to be located in one place (presumably within categories) to result in better delineation between organic and non-organic products. This is even more markedly so for the prime target market for organics, the Passionate segment.



Organic shopping in Ireland is not a destination experience, and there is limited demand for dedicated organic supermarkets; hence the promotion of organic in store is key to exploiting the nature of the opportunistic purchaser. Price promotion is always going to be extremely attractive to the potential organic buyer (though the impact on Casuals and Accidentals may be short lived), but other forms of in-store theatre and visual cues will also appeal. Imaginative packaging consistent with the values attached to organic will also engage the Passionates, Engaged (and even Casual) segments.

SHOPPING FOR ORGANIC

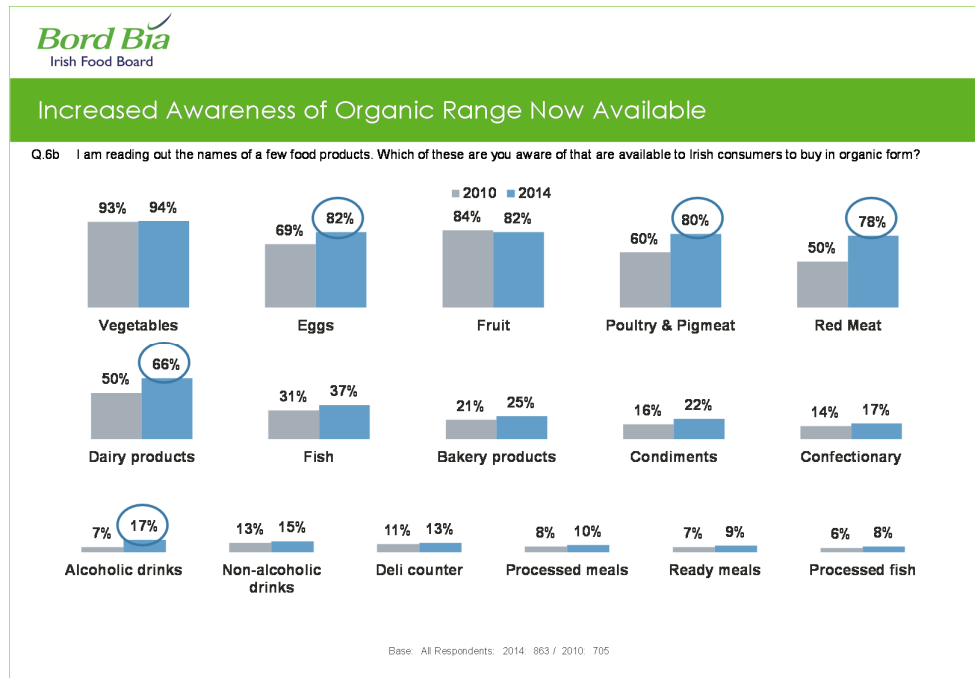
Organic shoppers currently are more likely to shop in Super Valu (including Superquinn), and are significantly more likely to be doing their top up shopping in the local butcher or farm related outlets.



Encouragingly, outlets which shoppers would reject as suitable places for buying organic have scaled back considerably since the last study, no doubt due to the greater availability of organic products generally.

ORGANIC CATEGORIES PURCHASED

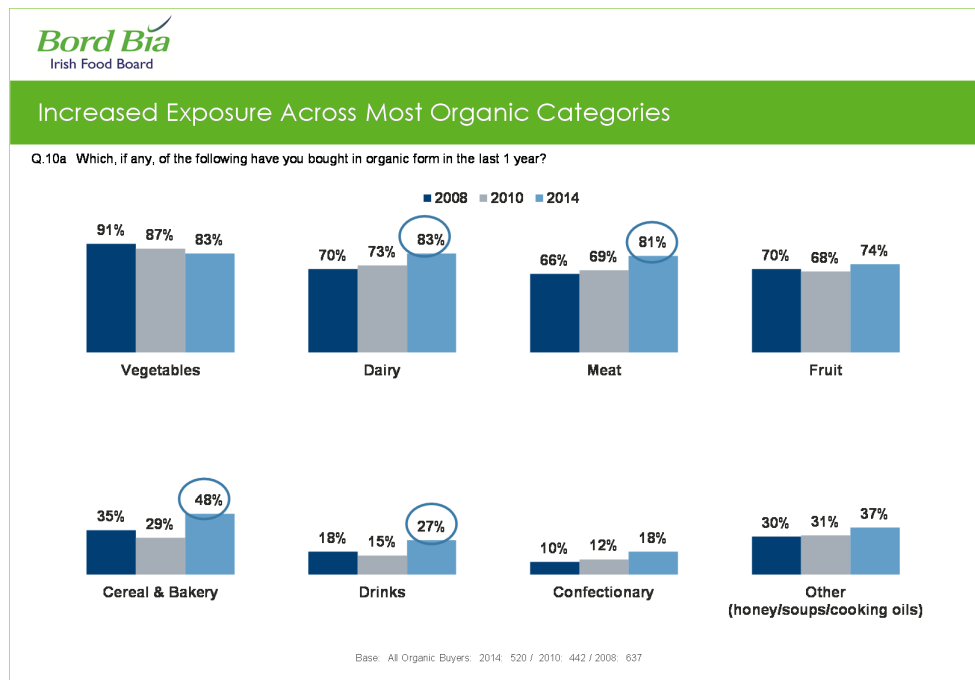
There is growing awareness of the range of products which are available to buy in organic form. Consistent with 2010, there is practically universal awareness that vegetables and fruit can be bought in organic form.



However, since the last study, there has been a particular growth in awareness in eggs, poultry and pig meat, red meat and dairy products being available organically produced.

ORGANIC CATEGORIES PURCHASED

The incidence of buying organic vegetables (among organic buyers) peaked in 2008, and has declined slightly since then, but remains at a very high level (83%). The incidence of buying organic dairy products in the past year has increased significantly from 70% in 2008 to 83% in 2014, making it the joint most commonly purchased category. The purchasing of organic meat has also grown steadily over this time period (up from 66% in 2008 to 81% in 2014), as has cereal and bakery products (now at 48% past year purchase). 74% of organic purchasers have bought fruit in the past 12 months – this has remained relatively steady since the initial measurement in 2008. At more modest levels, there has been a greater incidence of buying organic drinks, both alcoholic and in the form of juices and smoothies.



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