

INTERNATIONAL
**FRESH
PRODUCE**
ASSOCIATION



2024 Consumer Tracker
USA



Americans & Sustainability

The International Fresh Produce Association (IFPA) is the leading global trade association representing companies in the fresh produce and floral supply chains.



Research Purposes & Objectives

The IFPA performs a Global Intelligence Consumer Tracking Study on an annual basis to understand and trend consumer behavior and motivations when purchasing fresh fruit and vegetables.

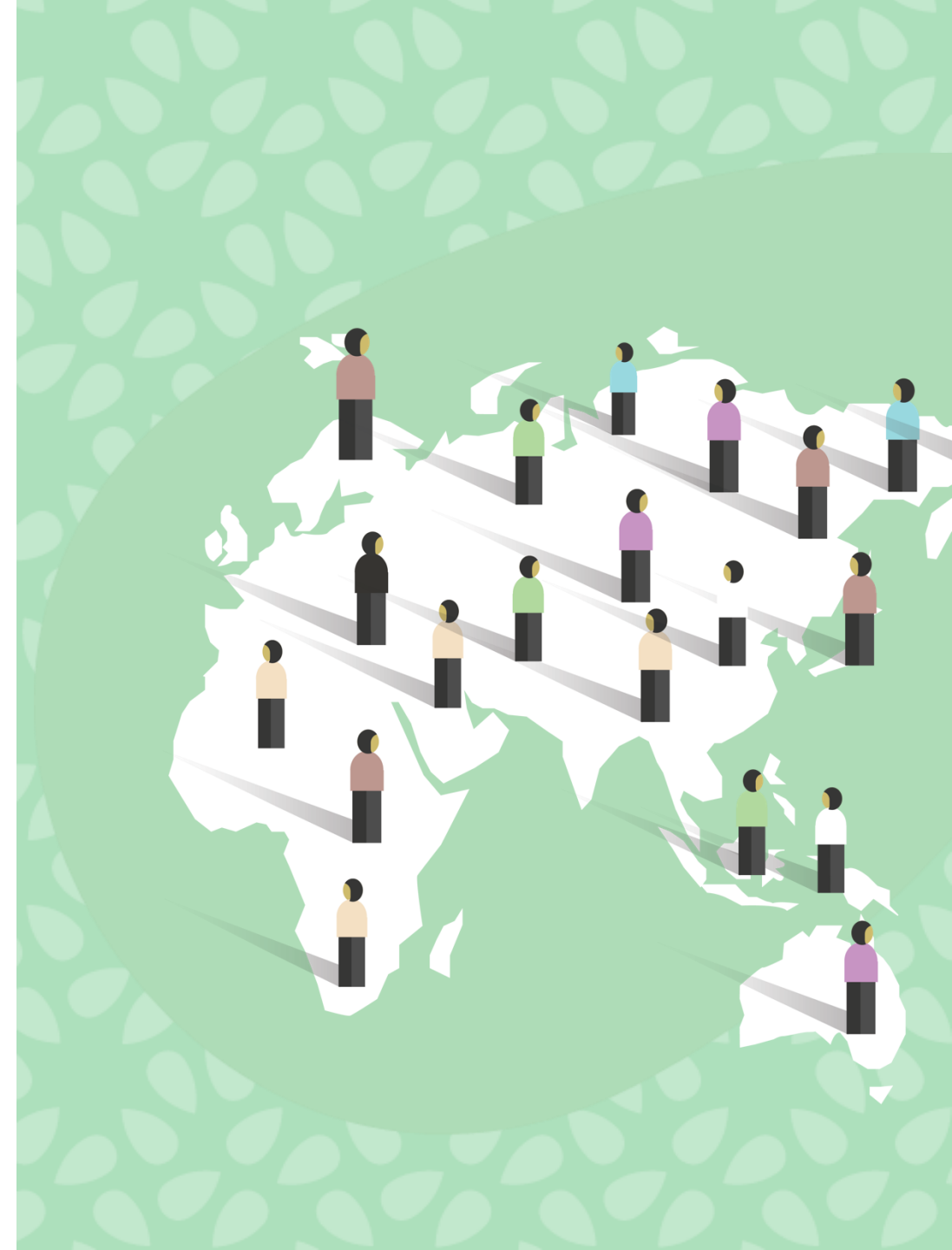
Research is conducted in seven (7) unique geographic areas:

- United States
- Australia
- Brazil
- China
- Germany
- UK
- South Korea

This report summarizes the findings in the United States with 754 consumers.

Margin of Error:

Overall, the sample size has a margin of error of +/- 1.4% at a 95% level of confidence; or +/- 3.6% for the USA.



Methodology and Sample Composition

A total of 754 U.S. based surveys were conducted for the study from December 3 - 18, 2024. Participants were sourced from leading online research panels.

To qualify for study inclusion, respondents were screened to meet the following qualifications:

- Age 18 - 78
- Primary or shared responsibility for purchasing groceries for household
- Purchase groceries once a month or more often
- Reside within the United States
- Does not work in a competitive industry

All research was carried out in compliance with all relevant legal and ethical requirements within the United States and in compliance with ISO 20252:2019.



Americans & Sustainability

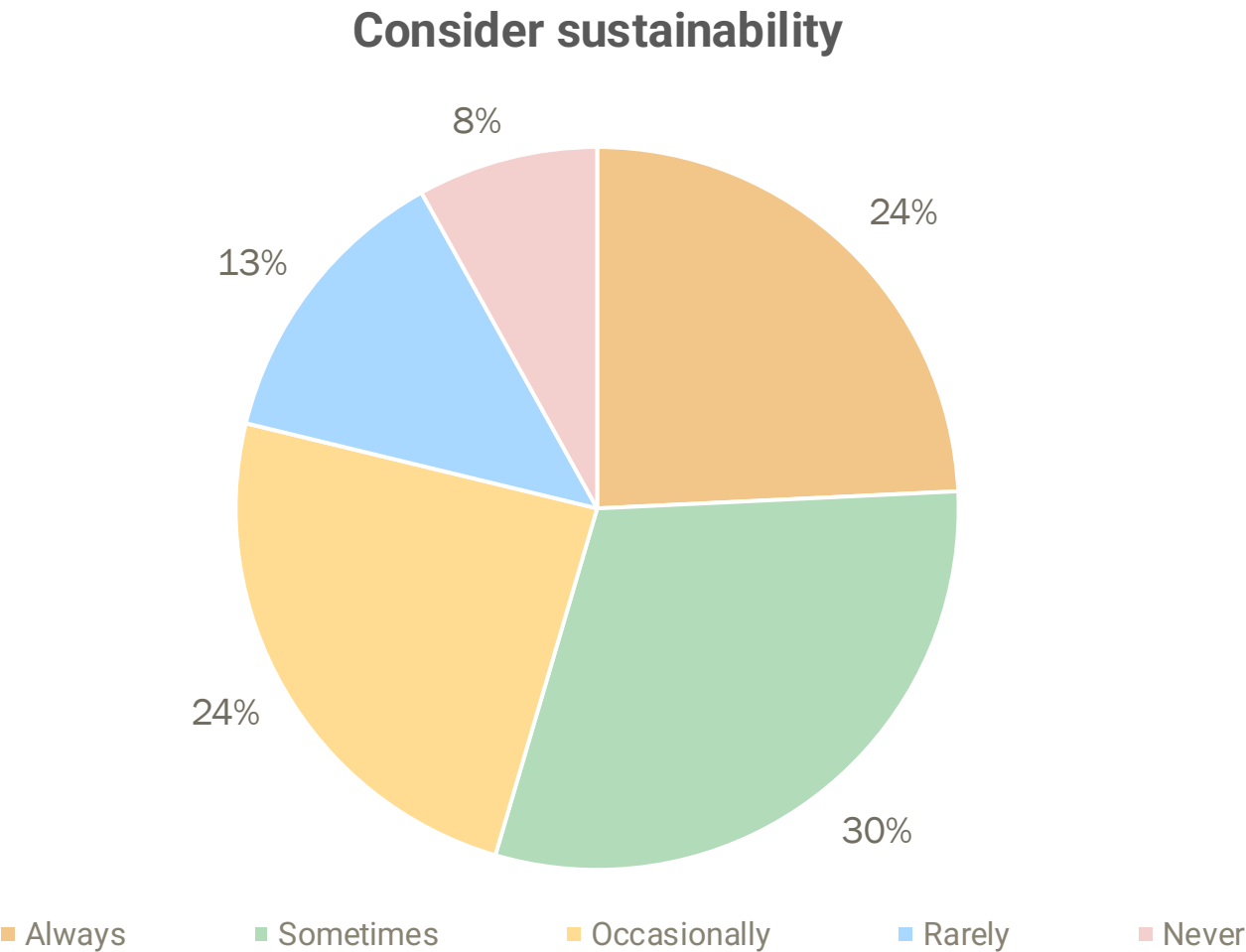
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Sustainability

Just over half of consumers consider sustainability attributes, such as growing methods and packaging materials, when purchasing fresh fruits and vegetables. Pesticides have the greatest influence on purchasing decisions. Consumers are most confident in defining the term "Locally Grown," followed by recyclable packaging, greenhouse grown, and organic. Nearly three out of four consumers are willing to pay a premium for produce labeled as "locally grown". Almost half of consumers are willing to pay a premium for packaging.



57% of Americans consider sustainability when purchasing fruits and vegetables.

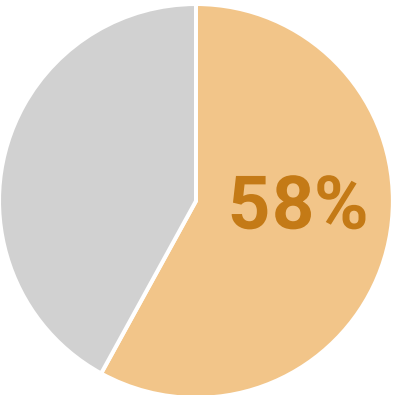


How often are you to consider attributes associated with sustainability, such as growing methods and packaging materials when purchasing fresh fruits & vegetables and cut flowers in the supermarket?

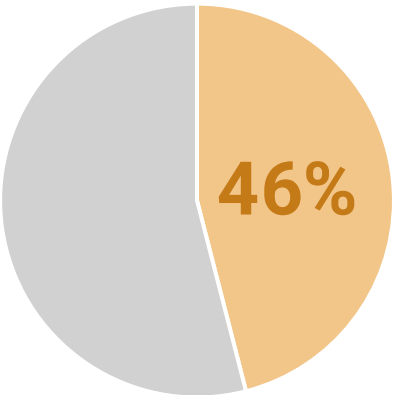


Americans are **willing to support sustainability.**

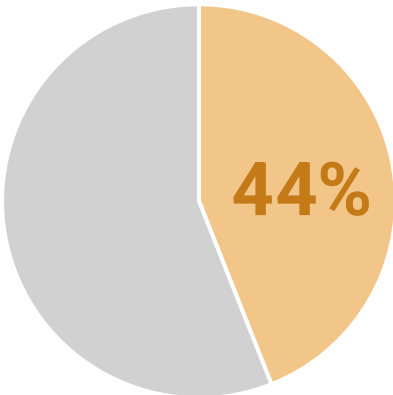
I am willing to make lifestyle changes to benefit the environment (i.e., composting, recycling, reusables)



I try to eat organic foods whenever possible

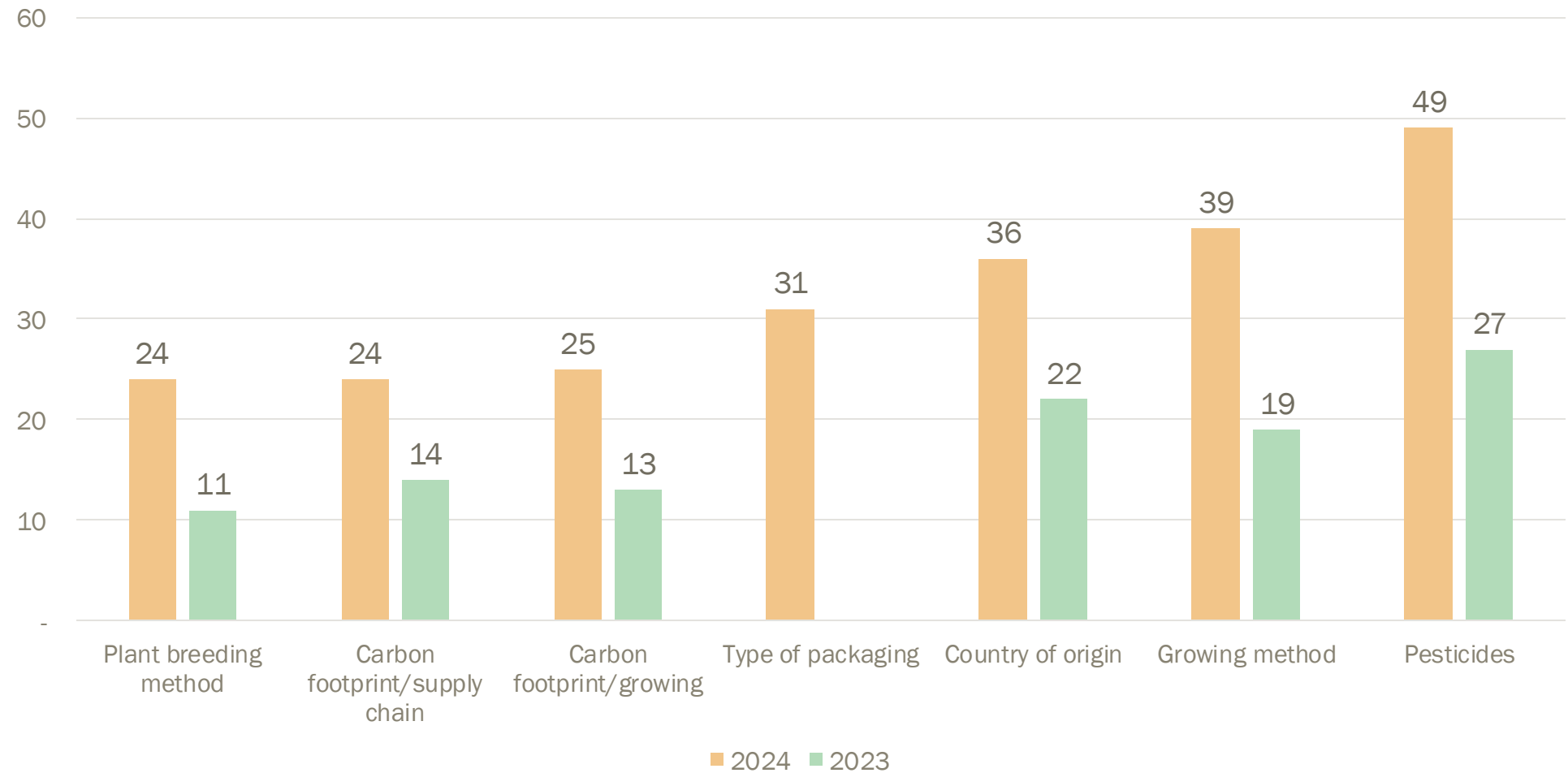


I am willing to pay more for products that are good for the environment/sustainable



Please indicate how much you agree or disagree with each statement.

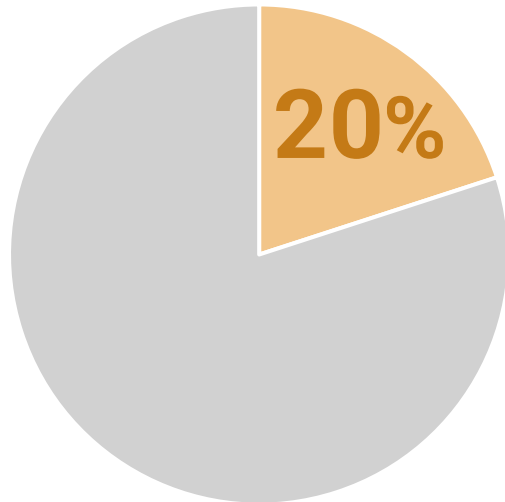
Sustainable issues are growing in influence when purchasing fresh fruits and vegetables. Pesticides continue to be the major influence for Americans.



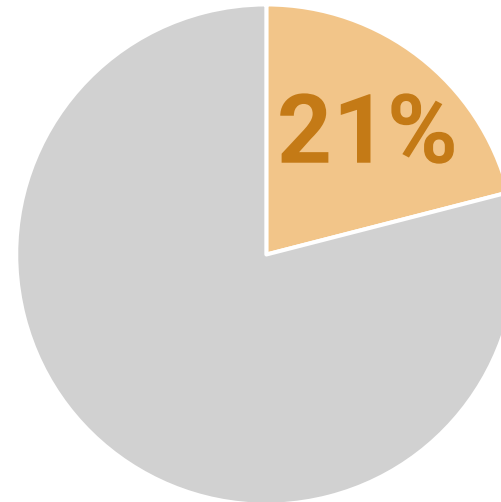
How much do the following attributes influence your purchasing decision for fresh fruit and vegetables?

20% of Americans understand the terms carbon farming and climate smart ag.

Climate Smart Ag

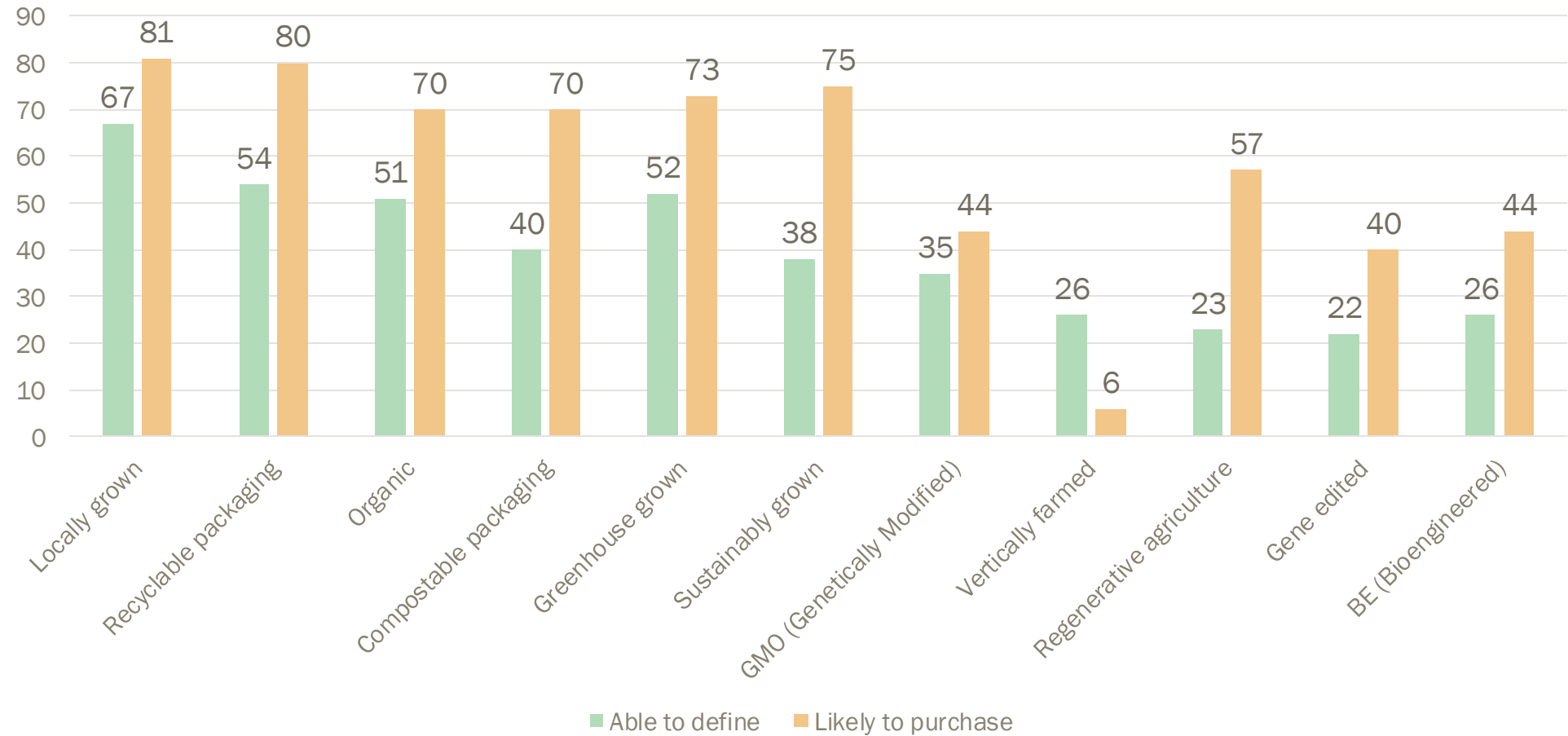


Carbon farming



How well can you define the following terms used in the produce department?

Americans are willing to purchase items that use **sustainable practices** without fully understanding the term.



How well can you define the following terms used in the produce department?



Americans continue to make decisions about quality and food safety **without fully understanding the terminology.**

	Define the term (extremely/likely)	Likelihood to purchase (extremely/likely)	Perceived Quality (good/excellent)	Perceived Safety (good/excellent)
Locally grown	67%	81%	85%	68%
Organically grown	51%	70%	81%	66%
Field grown	-	-	85%	57%
Greenhouse grown	-	-	78%	62%
Vertically farmed	26%	6%	72%	40%
Regeneratively grown	23%	57%	64%	33%

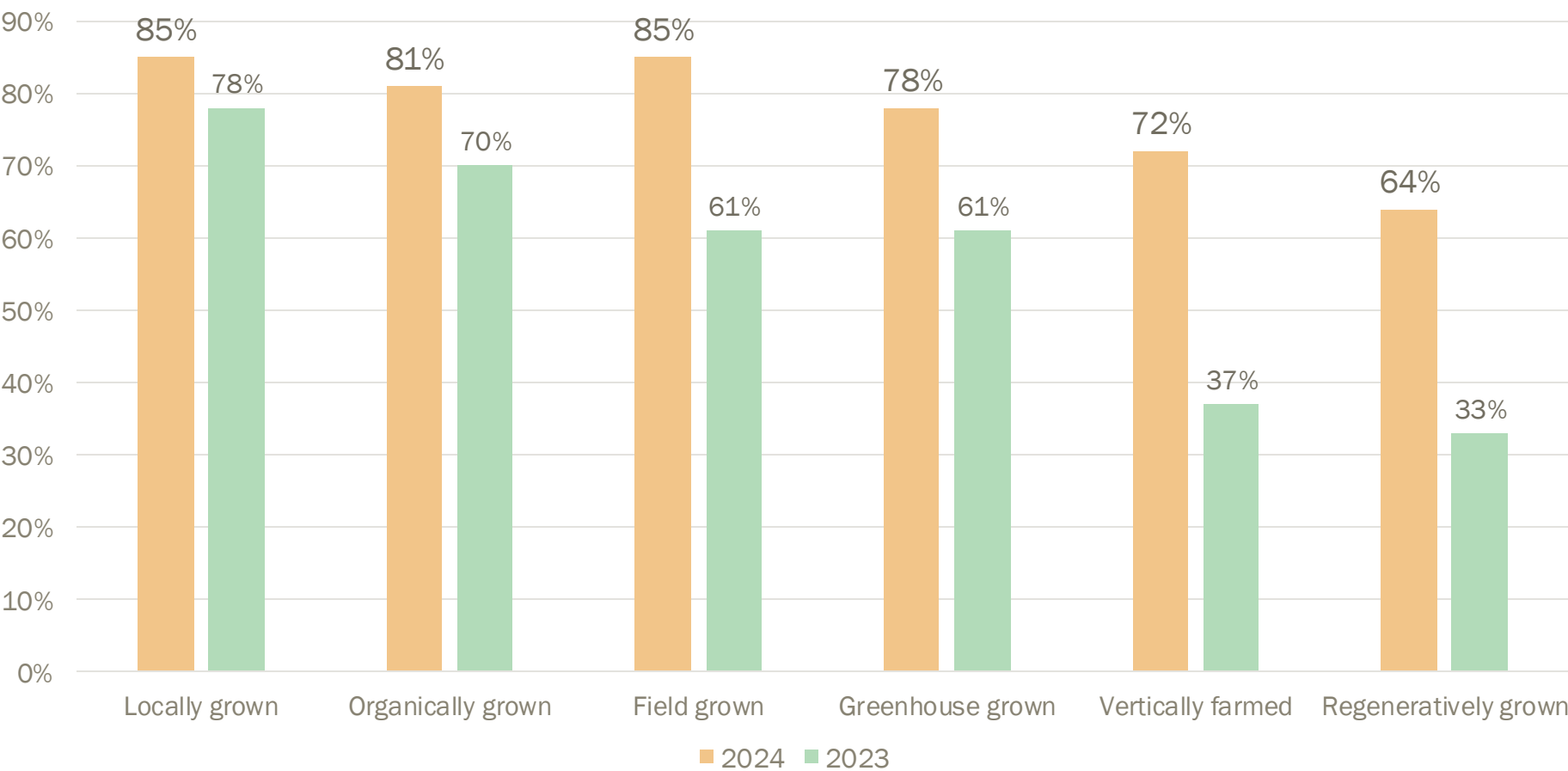
Please rate the perceived quality of the following produce attribute

Please rate the perceived food safety of the following produce attributes:



The perceived quality of produce regardless of production method is up in 2024 compared to 2023

Perceived Quality 2024 versus 2023

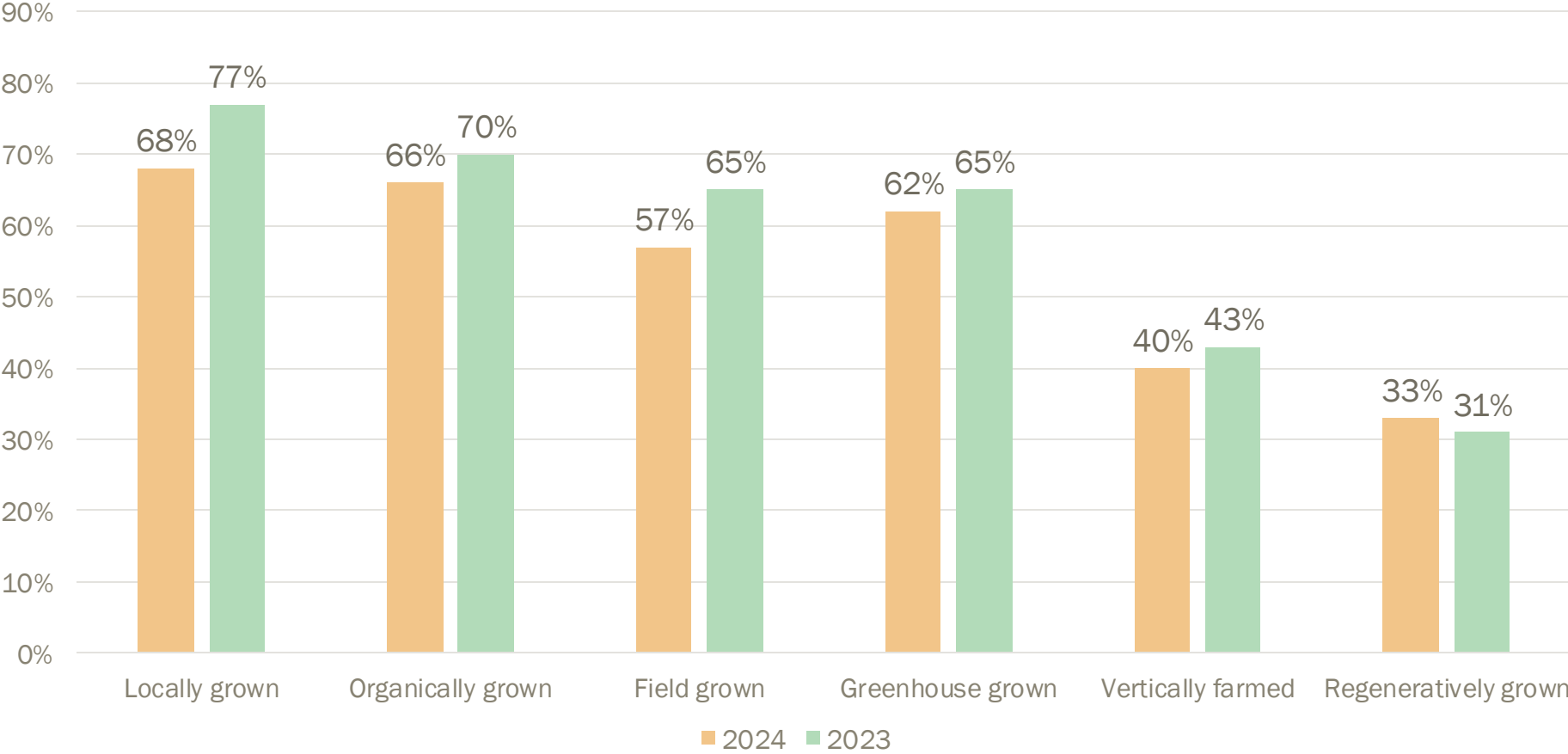


Please rate the perceived quality of the following produce attributes



The perception of food safety in fruits and vegetables is down slightly in 2024 from 2023.

Perceived Safety 2024 versus 2023



Please rate the perceived food safety of the following produce attributes:

Americans struggle to define molecular breeding. The perception of quality increased while the perception of safety decreased when comparing 2024 to 2023

	Define the term (extremely/likely)	Likelihood to purchase (extremely/likely)	Perceived Quality (good/excellent)	Perceived Safety (good/excellent)
2024 Molecular breeding	35%	44%	45%	22%
2023 Molecular breeding	-	-	25%	36%

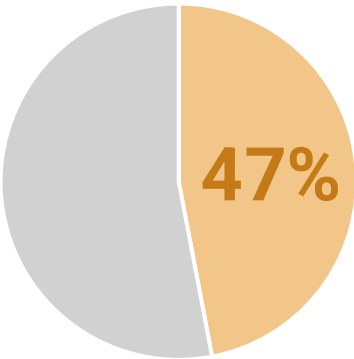
Please rate the perceived quality of the following produce attributes:

Please rate the perceived food safety of the following produce attributes:

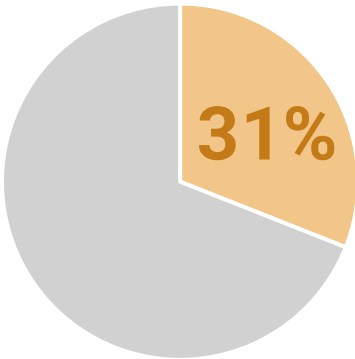


If price were a non-factor, locally grown would be the most likely produce to be purchased by Americans

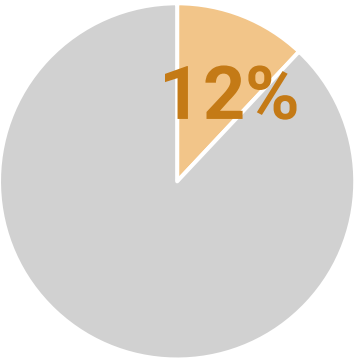
Locally Grown



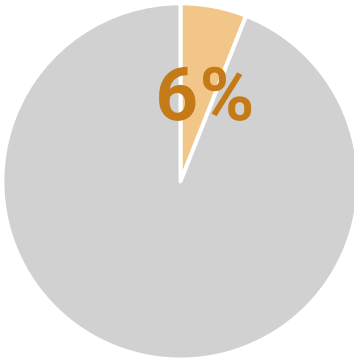
Organically Grown



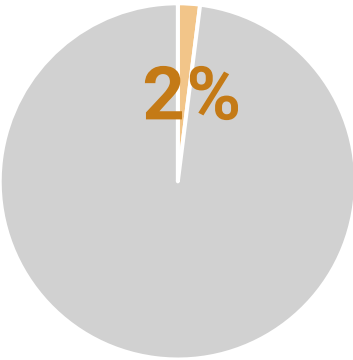
Field Grown



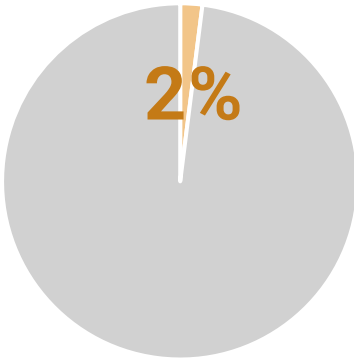
Greenhouse Grown



Vertically Grown



Regeneratively Grown

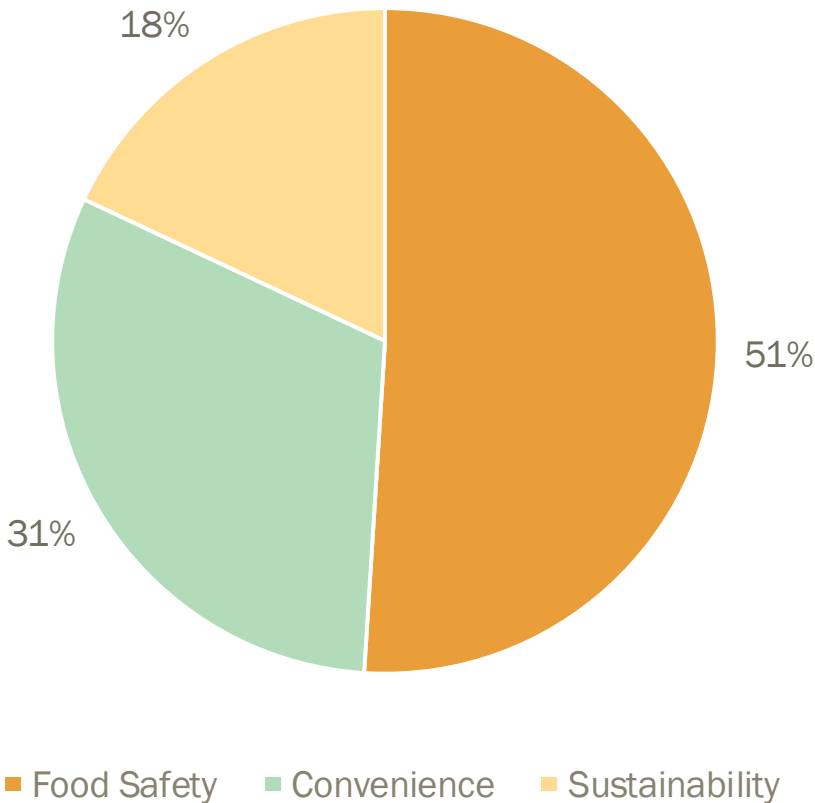


When grocery shopping for fresh fruits and vegetables, if priced the same, which product would you most likely purchase?



The first consideration about packaged produce for Americans is food safety.

First consideration when comparing packaged and non packaged fruits and vegetables



When comparing packaged to non-packaged fresh fruits and vegetables in the supermarket, what is your first consideration about packaged produce?

Breeding methods not likely to generate a premium.

	GMO	BE (Bioengineered)	Gene Edited
Average premium total is willing to pay	4.46%	4.6%	4.74%
Americans not willing to pay a premium in 2024	67%	66%	66%
Americans not willing to pay a premium in 2023	58%	60%	60%

How much more are you willing to pay for the following produce attributes?



Production methods not likely to generate a premium.

	Vertically Grown	Regenerative Ag
Average premium total is willing to pay	5.66%	5.63%
Americans not willing to pay a premium in 2024	54%	54%
Americans not willing to pay a premium in 2023	51%	53%

How much more are you willing to pay for the following produce attributes?

Production methods likely to generate a premium.

	Locally Grown	Organic	Sustainably Grown	Greenhouse Grown
Average premium total is willing to pay	9.81%	9.35%	7.38%	7.66%
Americans not willing to pay a premium in 2024	27%	30%	41%	41%
Americans not willing to pay a premium in 2023	22%	28%	39%	45% (hot house)

How much more are you willing to pay for the following produce attributes?



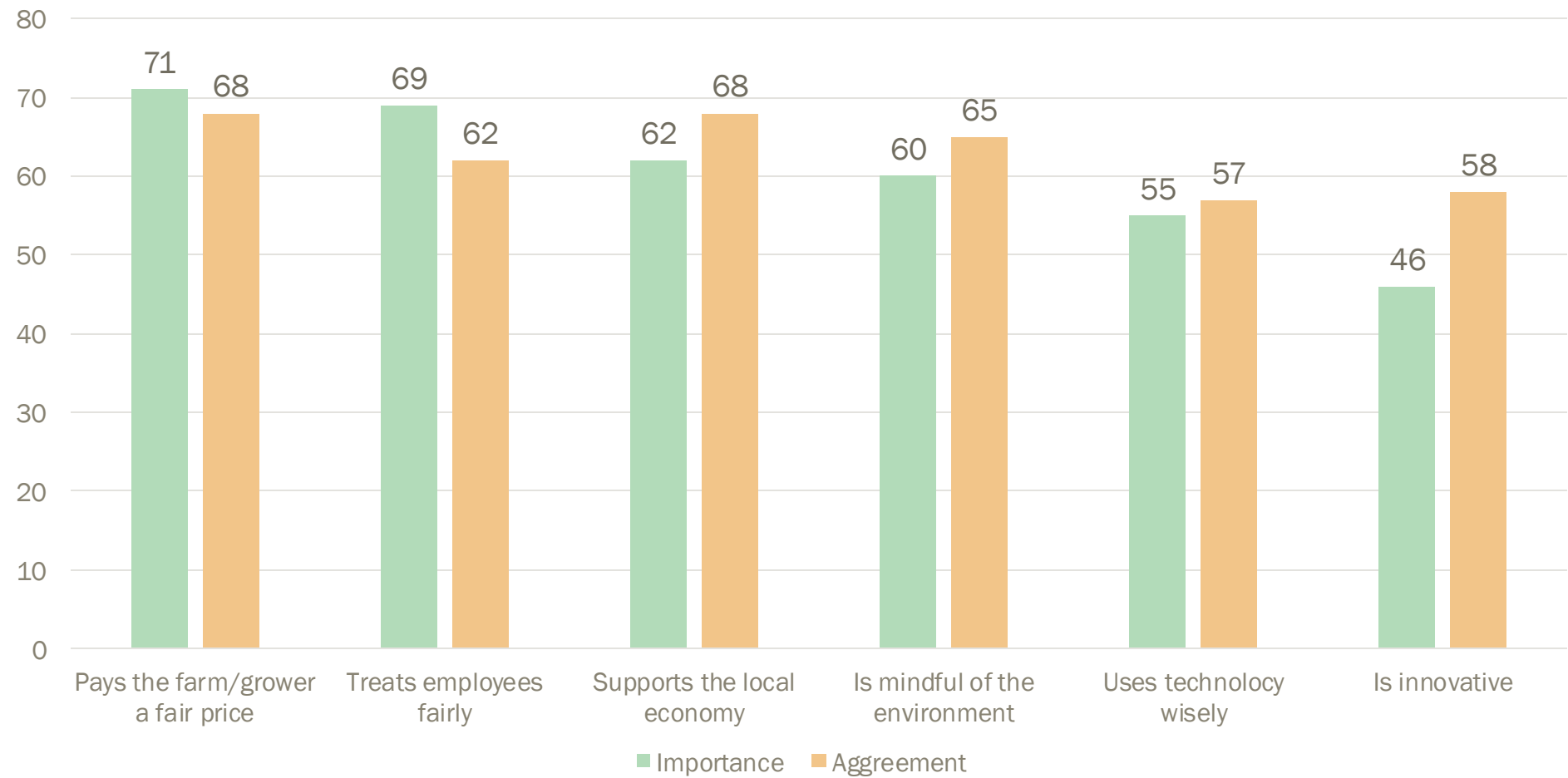
Packaging **likely to generate a premium with half of Americans.**

	Recyclable Packaging	Compostable Packaging
Average premium total is willing to pay	6.58%	6.4%
Americans not willing to pay a premium in 2024	47%	49%
Americans not willing to pay a premium in 2023	40%	44%

How much more are you willing to pay for the following produce attributes?



The produce industry is **living up to the importance that Americans place on the industry social responsibilities**



When thinking about the produce industry, how much do you agree with the following?