INTERNATIONAL FRESH PRODUCE ASSOCIATION

2024 Brazil

Produce Industry Brand

Who we are:

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

We are here to:

- advocates for members and industry;
- connects individuals and organizations with ideas, data and with each other;
- guides with education, insight, expertise, and solutions.

Produce Industry Branding

In today's fast-paced world, people turn to quick, convenient meals and snacks. But where will they look tomorrow? The fruit and vegetable industry's brand is vital in capturing consumers' attention and preference.

Why it matters: Understanding our brand is crucial. By resonating with consumers, we can increase our share of stomach and compete against other grocery store products.

The big picture: A brand is shaped by consumer perception and every aspect of the industry. And to win the food fight, fruits and vegetables must compete with various grocery store sections.

The bottom line: Consumer feedback helps us understand brand perception and increases our share of stomach.

Understanding Brand Perception

Brand perception is crucial in developing relationships with customers and winning their loyalty.

Why it matters: Consumers always consider their emotional connection when choosing between items that fulfil a similar purpose whether it be hunger in the produce category or indulgence in the floral category.

The big picture: Understanding the personality and attributes of our industries helps us connect with consumers.

The bottom line: Leverage industry personality and attributes to help shape your brand perception with consumers.

A guide for marketers

What this research tell us:

- The reputation of the produce industry is strong for businesses to build their messaging.

- The produce industry is seen as dynamic so we can benefit by demonstrating innovations in breeding and growing as well as showing produce in modern settings.

- Produce marketing can build off the industry's personality of being friendly and trendy – "fruits and vegetables should be the highlight of every meal."

- There are opportunities to build on the produce industry values diversity, equity and inclusion. This matters to consumers, yet the produce industry is not leveraging this attributes.

- To attract the best talent, is important to demonstrate the diversity and modernity of the industry.

Our Research Methodology

The study was conducted using an online methodology, with all fieldwork conducted on the Russell Research survey website.

A total of 4,533 interviews were conducted from February 9 – 28, 2024.

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
- Typically purchase groceries at a supermarket/grocery store or online retailer
- Reside within the United States, Brazil, the United Kingdom, Germany, China or Australia
- 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.

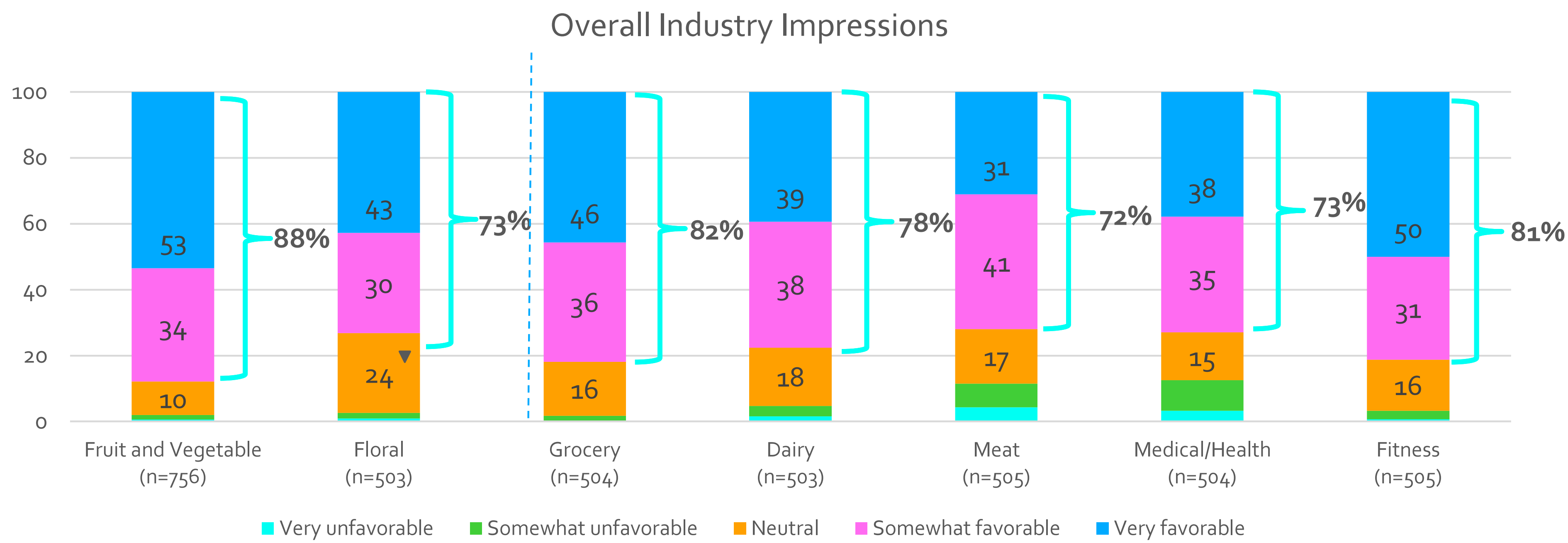
Produce Brazil Summary

- Consumer impressions of the fruit & vegetable industry in Brazil are strong both on their own and compared to benchmarks.
  - Nearly 9 in 10 consumers have a favorable impression (higher than all other industries).
  - Nearly three quarters of consumers believe the industry is '*on its way up'* or 'holding its ground'. These industry Momentum trail only Fitness.
  - The Fruit & Vegetable industry is very well regarded, with 86% describing it as very or somewhat Favorable.

Fruit & Veggie Industry	**Fruit & Veggie Industry Personality Traits**
• Trustworthy • Mindful of the environment	• Friendly • Trendy • Approachable • Trustworthy

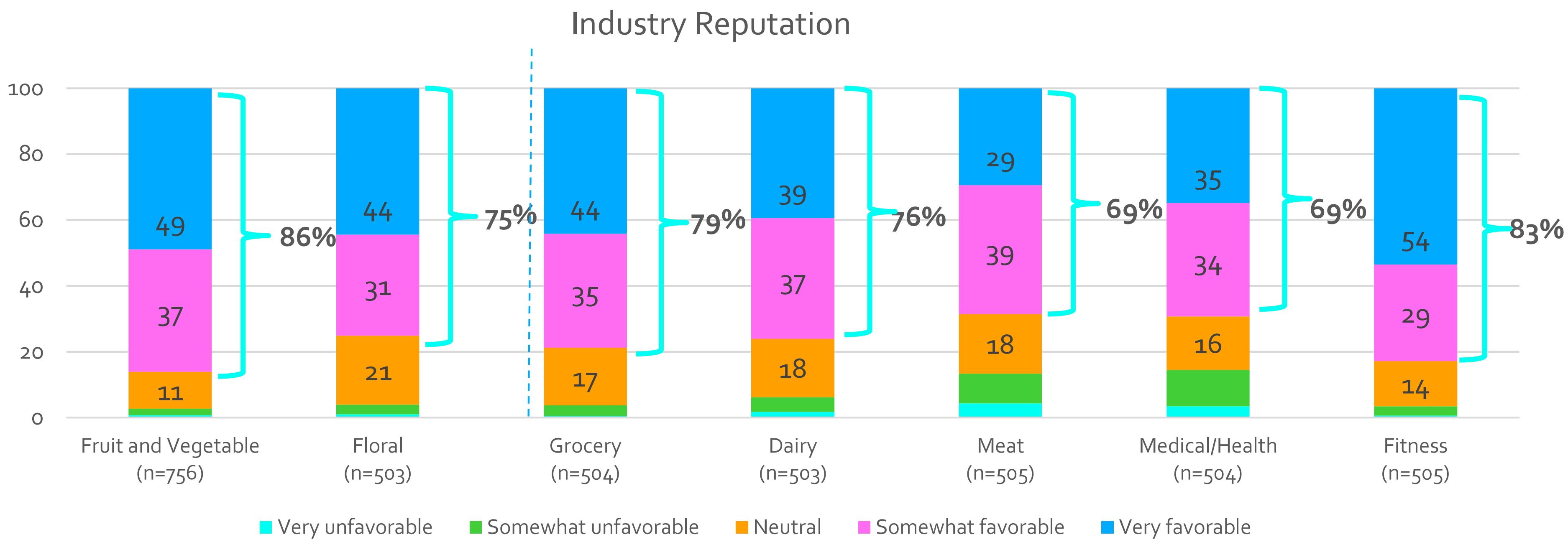
- A relative importance analysis indicates it would be beneficial to communicate the industry *Values diversity, equity and inclusion.*

Most consumers have a favorable impression of the fruit & veggie industry in Brazil with grocery closely following.



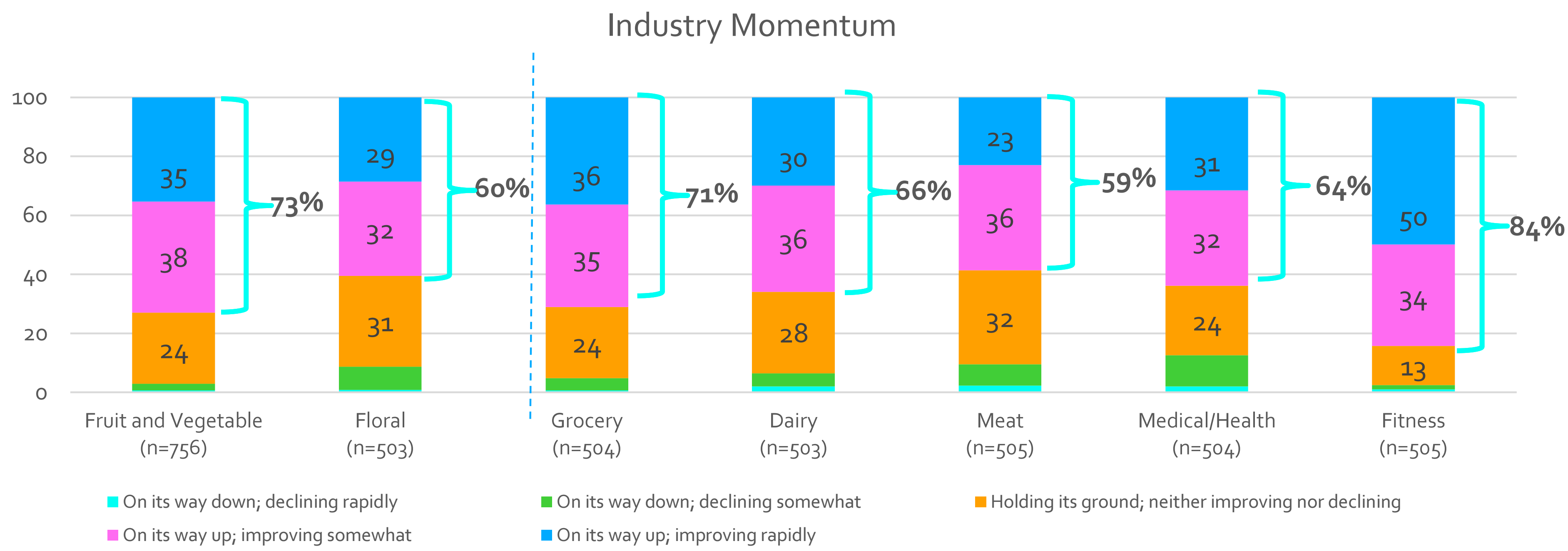
Base: Total Brazil Respondents Evaluating Industry
3. What is your overall impression of the [INSERT INDUSTRY]?

The produce industry has a very favorable reputation. This provides a great foundation for marketers within the produce industry.



Base: Total Brazil Respondents Evaluating Industry
6. Which of the following best describes what you feel is the current **reputation** of the [INSERT INDUSTRY]?

Nearly three-fourths of consumers believe the Fruit and Vegetable industry is on its way up/gaining momentum. These levels are significantly higher than Floral, Dairy, Meat, and Medical.



Base: Total Brazil Respondents Evaluating Industry

5. When you think about certain industries, some seem to be on their way up and have a lot going for them, while others don't. Which of these statements best describes how you feel about the [INSERT INDUSTRY]?

Industry Drivers United States

Relative Importance

What is it?

It is an extension of regression analysis that allows us to assess which attributes are most important and exactly how much more important one is than another.

The most important factors to Brazilian consumers when evaluating the produce industry are:
Is Trustworthy
Promotes individual health
Adapts quickly to meet the needs of consumers
Offers affordable options

Relative Importance for Produce Industry

	Relative Importance	Rank Order
Total Brazil Respondents	(756)	
Is trustworthy	14.89	1
Promotes individual health	10.03	2
Adapts quickly to meet the needs of consumers	9.53	3
Offers affordable options	8.82	4
Is mindful of the environment	7.18	5
Values diversity, equity and inclusion	6.46	6
Creates products or services worth paying extra for	6.10	7
Is transparent in its production/service methods	5.26	8
Is innovative	4.75	9
Uses technology wisely	4.30	10
Offers unique products and experiences	4.06	11
Attracts top talent	3.99	12
Promotes public health	3.95	13
Makes room for a wide variety of brands	3.86	14
Helps solve some of society's most pressing problems	3.48	15
Treats employees fairly	3.35	16

Stated vs. Relative Importance

The results of the Relative Importance Analysis are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows:

Critically Important

(High Relative / High Stated Importance)

- **These are strong positioning attributes if an industry can deliver in these areas.**

  - ✓ Is trustworthy
  - ✓ Offers affordable options
  - ✓ Adapts quickly to meet the needs of consumers
  - ✓ Promotes individual health
  - ✓ Is mindful of the environment

Hidden Opportunities

(High Relative / Low Stated Importance)

- **These drivers may not be expressed but are important positioning attributes.**

  - ✓ Values diversity, equity and inclusion

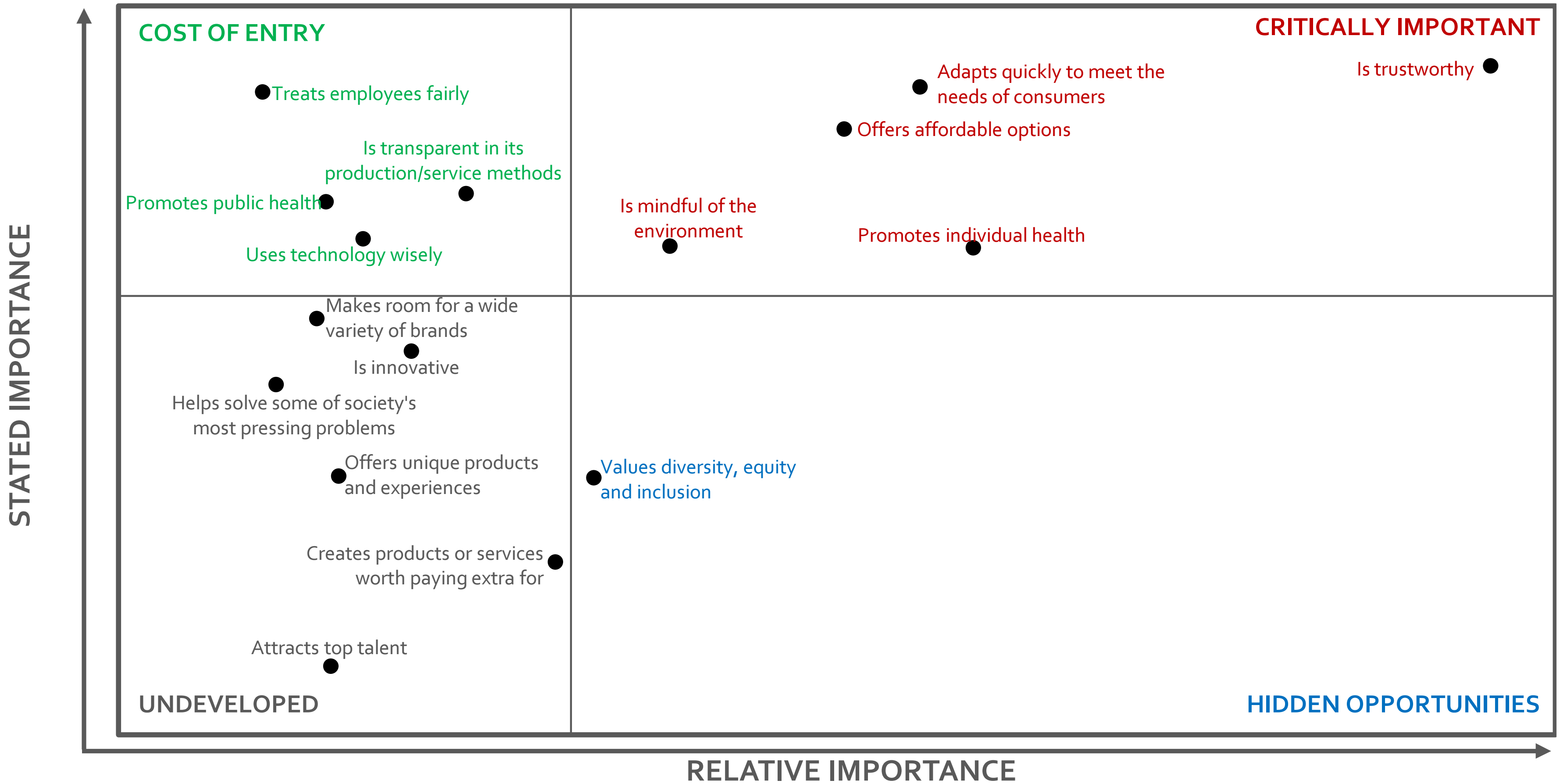
Cost of Entry

(Low Relative / High Stated Importance)

- **These are important for all category industries to deliver. They are necessary but provide no leverage.**

  - ✓ Is transparent in its production/service methods
  - ✓ Uses technology wisely
  - ✓ Promotes public health
  - ✓ Treats employees fairly

Stated vs. Relative Importance – Brazil Produce Industry



Brazilian consumers were most likely to agree that the Fruit and Vegetable industry

Offers affordable options,
Trustworthy
Mindful of the environment.

Industry Descriptor Agreement Ratings
(Top-Two Box Ratings: Agree Completely/Somewhat)

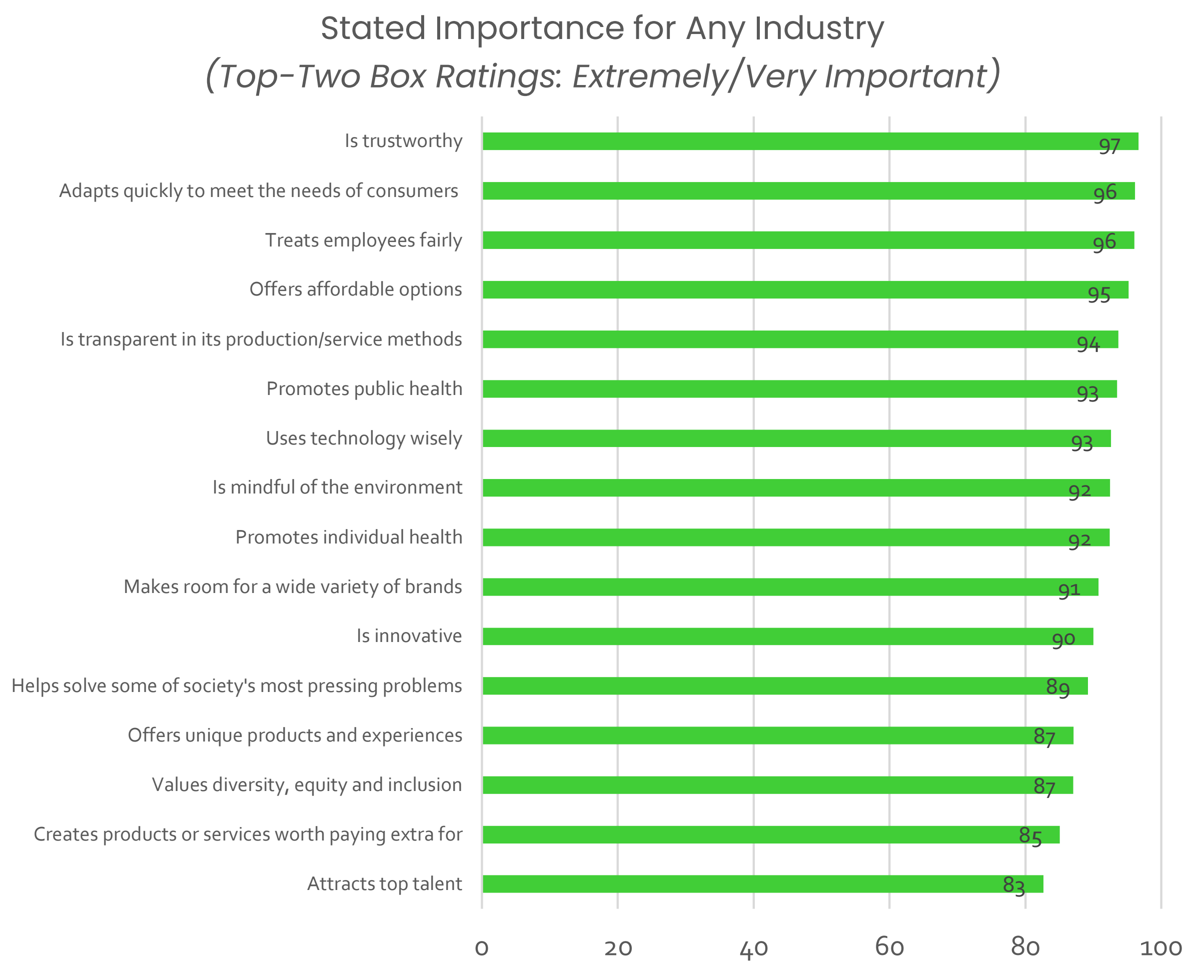
	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/ Healthcare	Fitness
Total Brazil Respondents Evaluating Industry	(756)	(503)	(504)	(503)	(505)	(504)	(505)
	%	%	%	%	%	%	%
Offers affordable options	87	77	87	84	77	71	78
Is trustworthy	86	81	83	81	71	82	84
Is mindful of the environment	85	82	69	70	60	67	68
Adapts quickly to meet the needs of consumers	84	76	87	81	76	78	85
Promotes public health	84	59	70	74	63	81	87
Promotes individual health	83	62	72	75	65	84	89
Makes room for a wide variety of brands	81	71	87	87	80	75	81
Uses technology wisely	80	68	81	84	76	86	83
Creates products or services worth paying extra for	79	72	78	79	70	74	77
Is transparent in its production/service methods	77	75	73	72	62	69	75
Offers unique products and experiences	77	77	82	80	77	77	82
Is innovative	73	73	78	74	69	79	82
Helps solve some of society's most pressing problems	73	57	72	64	60	80	70
Values diversity, equity and inclusion	71	68	76	68	63	70	78
Attracts top talent	67	65	67	63	63	75	70
Treats employees fairly	66	63	69	63	62	65	67

2. Thinking about the [INSERT INDUSTRY], how much do you agree or disagree that the following **attribute** describes this industry?

When thinking about any type of industry…

Brazilian consumers place the highest importance on

Trustworthiness
Adapt quickly to meet consumer needs
Treats employees fairly



Base: Total Brazil Respondents (n=756)
1. How important is it to you that any type of industry …?

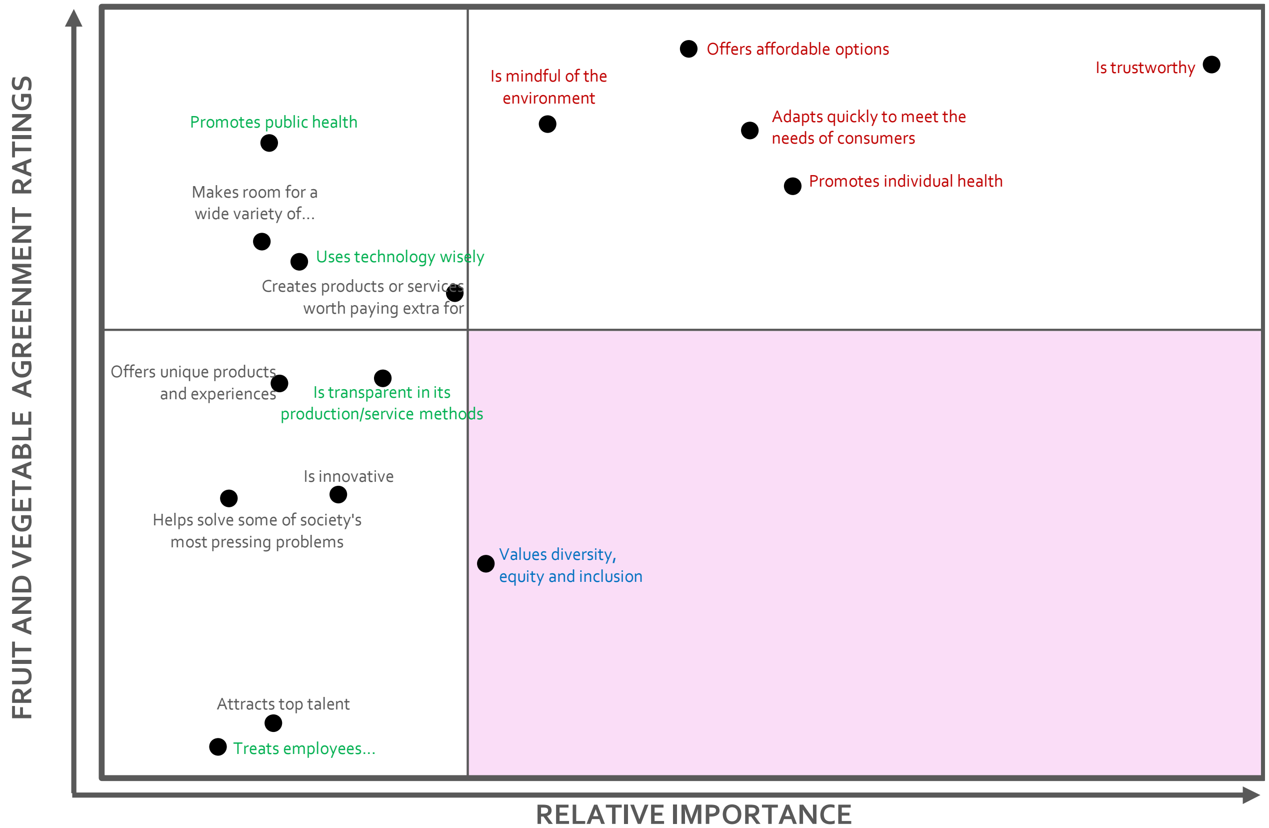
The relative importance of each statement and respondents' agreement that the industry portrays that statement was plotted on this map.

Attributes on the right side are most important to respondents.

Attributes appearing in the lower right quadrant need the greatest attention—they are high in relative importance but rated low for the industry.

The Brazilian produce industry has an opportunity to communicate it commitment to diversity, equity and inclusion.

Relative Importance vs. Produce Agreement Ratings



Fruit & Veggie Industry Personality

AI Chosen Image to Depict Produce Industry

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/ Healthcare	Fitness
Total Brazil Respondents Evaluating Industry	(756)	(503)	(504)	(503)	(505)	(504)	(505)
	%	%	%	%	%	%	%
Friendly	62	65	50	45	31	24	53
Trendy	54	35	61	46	44	33	46
Approachable	50	32	52	44	28	27	37
Trustworthy	49	38	44	43	33	45	45
Budget-Conscious	42	16	40	28	22	12	13
Simple	37	27	31	29	21	14	13
Confident	36	31	37	33	27	38	37
Consistent	30	21	34	33	32	33	28
Expert	29	30	29	34	33	58	44
Accepting	27	31	35	23	17	26	35
Modern	27	32	34	37	23	35	56
Classic	22	36	21	26	20	19	11
Honest	22	23	18	18	13	23	19
Fun	17	30	17	12	8	7	40
Exotic	12	37	5	3	8	1	8
Formal	11	16	16	12	17	27	11
Casual	9	19	14	10	8	7	14
Adventurous	8	15	9	8	9	6	32
Outdated	3	3	2	5	7	8	2
Uptight	3	2	3	4	13	20	5
Boring	2	2	2	1	2	7	2

4. Imagine for a moment the [INSERT INDUSTRY] was a person. What types of words and/or descriptions would you use to describe that person? Please select as many or as few adjectives and/or descriptors you'd like.

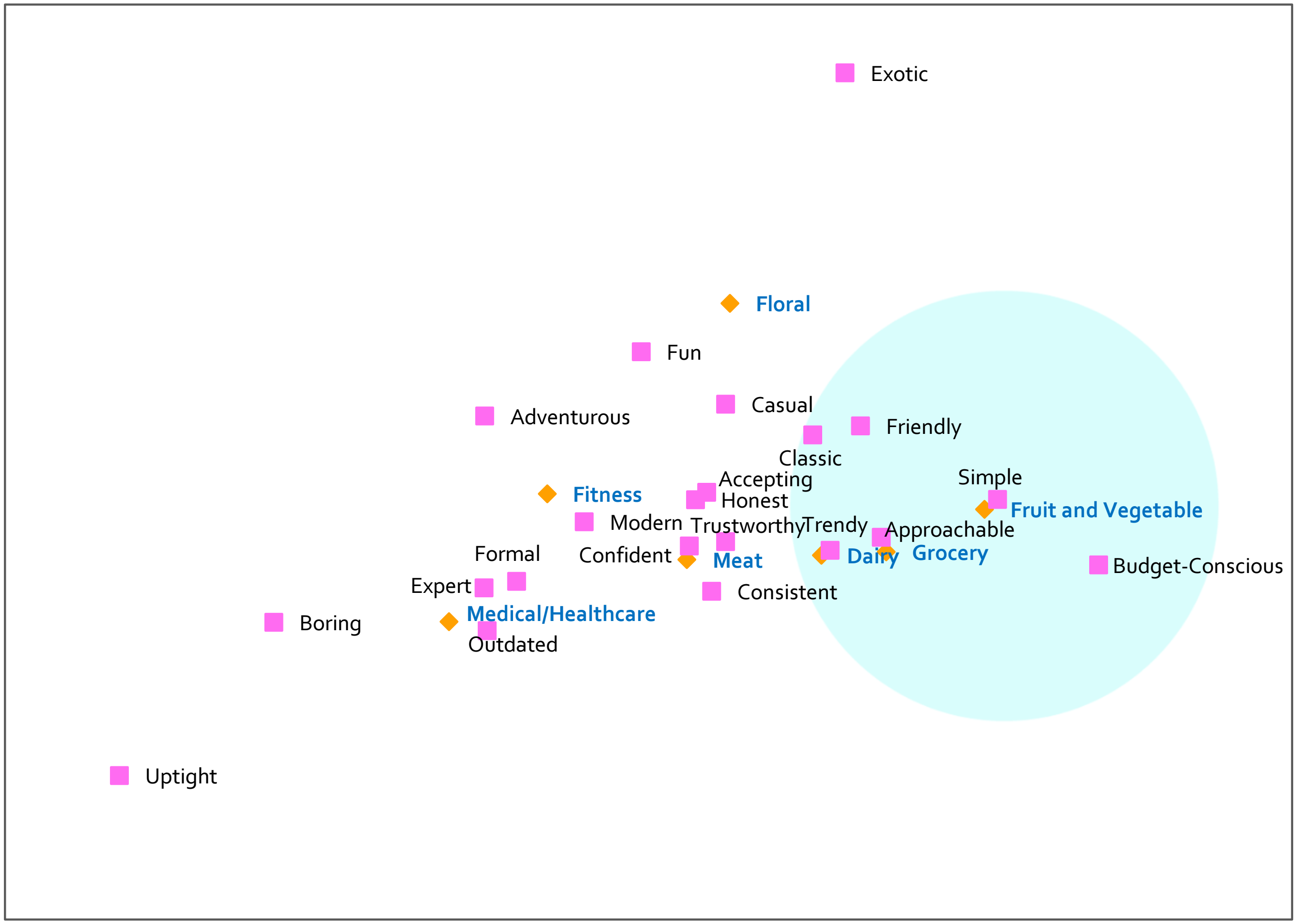
Correspondence analysis

What it is:

A mapping technique that allows us to determine which industry attributes are most differentiating for and which attributes would need to be changed to move industry perceptions closer or farther from another industry.

Industries and attributes that are rated similarly are placed close to each other on the map, while those that are rated differently will appear in a different area of the map.

Industry Personality Correspondence Map



Fruit and Vegetable Industry Findings By Key Segments

		Gender		Generation				Income	
	Total Brazil	Male	Female	Gen Z	Millennials	Gen X	Boomers	R$ 4.000 or Less	R$ 4.001 or More
Total Brazil Respondents	(756)	(333)	(420)	(130)	(301)	(251)	(74)	(343)	(406)
	%	%	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]		
Overall Impression of Industry									
Very Favorable	53	53	54	50	52	53	62	50	57
Very/Somewhat Favorable	88	84	91	86	87	85	96	83	91
Industry Momentum									
On its way up /Improving rapidly	35	36	34	30	39	35	35	32	39
On its way up /Improving rapidly or somewhat	73	72	74	74	72	73	75	73	73
Industry Reputation									
Very Favorable	49	50	48	39	52	48	54	44	54
Very/Somewhat Favorable	86	85	87	84	85	85	92	83	88

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Offers affordable options	87	85	88	89	87	83	90	83	90
Is trustworthy	86	86	87	85	87	84	90	85	88
Is mindful of the environment	85	82	87	85	85	81	89	84	86
Adapts quickly to meet the needs of consumers	84	82	87	84	83	82	91	82	86
Promotes public health	84	80	88	86	88	81	79	84	84
Promotes individual health	83	79	86	86	84	80	81	82	83
Makes room for a wide variety of brands	81	79	83	79	79	82	85	78	84
Uses technology wisely	80	80	81	77	82	80	81	80	82
Creates products or services worth paying extra for	79	77	82	75	84	78	80	76	83
Is transparent in its production/service methods	77	76	78	75	79	76	77	75	79
Offers unique products and experiences	77	75	79	72	75	81	80	75	80
Is innovative	73	72	75	61	76	76	79	72	76
Helps solve some of society's most pressing problems	73	71	75	72	78	71	71	72	75
Values diversity, equity and inclusion	71	69	74	73	74	69	69	71	72
Attracts top talent	67	65	68	66	69	69	59	67	68
Treats employees fairly	66	66	66	66	70	65	61	68	66

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	%	%	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]		
Friendly	62	61	63	63	59	61	69	63	61
Trendy	54	52	56	49	46	61	61	54	54
Approachable	50	48	51	46	49	53	50	48	51
Trustworthy	49	51	48	49	47	49	55	51	49
Budget-Conscious	42	44	40	44	39	44	43	42	42
Simple	37	39	35	34	35	34	51	35	40
Confident	36	37	36	31	34	38	42	38	35
Consistent	30	34	26	31	29	29	32	26	33
Expert	29	32	26	25	27	32	33	26	32
Accepting	27	27	27	26	28	30	23	24	30
Modern	27	33	21	26	24	29	29	25	29
Classic	22	23	22	27	24	24	12	23	22
Honest	22	22	22	20	21	21	30	20	24
Fun	17	15	18	15	20	15	15	16	17
Exotic	12	13	11	16	12	11	11	12	13
Formal	11	12	9	13	11	10	9	11	10
Casual	9	7	10	15	8	9	3	9	9
Adventurous	8	10	7	11	7	9	6	6	10
Outdated	3	3	3	2	3	3	3	3	3
Uptight	3	3	2	6	1	4	1	2	3
Boring	2	2	2	3	3	2	0	3	1

Shopping Habits

		Gender		Generation				Income	
	Total Brazil	Male	Female	Gen Z	Millennials	Gen X	Boomers	R$ 4.000 or Less	R$ 4.001 or More
Total Brazil Respondents	(756)	(333)	(420)	(130)	(301)	(251)	(74)	(343)	(406)
	%	%	%	%	%	%	%	%	%
Responsibility for Grocery Purchases									
Primarily responsible	71	71	70	52	79	77	65	64	76
Share responsibility	29	29	30	48	21	23	35	36	24
Frequency of Purchasing Groceries									
Several times per week	36	41	31	36	40	34	33	32	40
Once a week	37	36	38	30	38	39	39	33	39
2 to 3 times per month	17	15	20	25	16	16	13	21	14
Once a month	10	8	11	8	7	11	15	13	7
Mean times per month:	5.1	5.4	4.8	5.0	5.3	5.0	4.8	4.7	5.4
Groceries Purchase on a Regular Basis									
Fresh produce (fruits and vegetables)	94	94	94	86	96	97	94	91	97
Beef and/or poultry	92	92	92	91	93	92	91	88	96
Dairy milk	77	78	77	72	81	76	80	73	81
Fresh flowers	10	10	11	14	12	8	6	8	12

Shopping Habits

	Total Brazil	Gender		Generation				Income	
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Total Brazil Respondents	(756)	(333)	(420)	(130)	(301)	(251)	(74)	(343)	(406)
	%	%	%	%	%	%	%	%	%
Typical Grocery Purchase Locations *									
Supermarket/Grocery Store	96	96	95	96	95	96	96	96	95
Mass Merchandiser	51	55	46	46	61	51	35	39	61
Online retailer	32	34	29	33	44	25	18	21	41
Drug Store	22	24	20	26	26	17	17	22	21
Convenience Store	20	25	16	25	33	12	4	16	24
Warehouse Club	15	14	15	16	22	12	4	9	20
Farmer's Market/Farm Store	7	8	7	12	9	6	3	4	10
Dollar Store	2	2	2	3	3	2	0	1	2

* Respondents had to purchase from a supermarket/grocery store and/or from an online retailer to qualify for this study.

Demographic Summary

	Total Brazil	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	R$ 4.000 or Less	R$ 4.001 or More
Total Brazil Respondents	(756)	(333)	(420)	(130)	(301)	(251)	(74)	(343)	(406)
	%	%	%	%	%	%	%	%	%
Gender									
Male	48	100	-	44	46	50	52	44	52
Female	52	-	100	56	54	49	48	55	48
Non-binary	0.3	-	-	0	1	0	0	1	0
Generation									
Gen Z (18 - 26)	19	18	20	100	-	-	-	27	13
Millennials (27 - 42)	34	32	35	-	100	-	-	30	38
Gen X (43 - 58)	29	30	28	-	-	100	-	30	28
Boomers (59 - 78)	18	20	17	-	-	-	100	12	21
Mean Age:	42.2	43.1	41.3	22.8	34.1	50.8	64.0	39.5	44.0
Marital Status									
Married	49	49	49	22	60	55	46	34	61
Not Married	51	51	51	77	40	45	54	65	39
Employment Status									
Employed	75	81	69	77	91	78	38	71	79
Not Employed	25	19	30	23	8	22	62	28	21

Demographic Summary

		Gender		Generation				Income	
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Total Brazil Respondents	(756)	(333)	(420)	(130)	(301)	(251)	(74)	(343)	(406)
	%	%	%	%	%	%	%	%	%
Education									
Less than high school	19	17	20	24	4	29	25	31	9
High school	41	45	38	55	39	35	42	52	32
College	40	38	41	21	58	37	32	16	59
Median Monthly Household Income:	R$ 5.2K	R$ 5.4K	R$ 5.0K	R$ 3.9K	R$ 5.7K	R$ 5.2K	R$ 5.6K	R$ 2.3K	R$ 7.6K
Area Live In									
São Paulo	32	30	34	31	34	34	25	28	36
Ribeirão Preto	25	23	26	32	20	27	21	32	19
Rio de Janeiro	15	14	17	12	17	17	13	15	16
Belo Horizonte	7	9	6	6	7	7	8	7	7
Porto Alegre	5	4	5	7	3	3	6	3	5
Salvador	4	5	4	5	5	3	4	4	5
Recife	3	4	2	4	3	4	3	3	4
Curitiba	3	4	2	1	4	1	7	4	3
Brasilia	3	4	2	1	5	2	3	4	2
São José dos Campos	1	2	1	0	1	1	6	0	2
São José do Rio Preto	1	1	1	0	1	0	1	0	1
Presidente Prudente	1	1	0	1	0	0	1	0	1
Another Area	25	23	26	32	20	27	21	32	19