



Nutrition Matters: The Opportunities for Organic Produce at Retail

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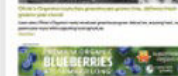
Organic Produce Network
by Informa

Organic Produce Network connects organic produce growers, CPG entrepreneurs and retailers to create a prosperous supply chain that supports the growth of organic produce and good health for people and the planet.

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Nutrition Matters

The opportunities for organic produce at retail

Chris Costagli

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July 2026



Most households buy organic produce already

79%

of U.S. households
buy organic produce

(+0.2 Pts. Vs. YA)



Source: NIQ, Expanded Omni Shopper Panel On Demand, Powered By Product Insights, Fruit + Vegetables, PI Organic Positioning STTD, Total US, Total Outlets, 52-Weeks Ending 5/16/2026

Nearly half buying organic produce, do so 5+ times per year



49%

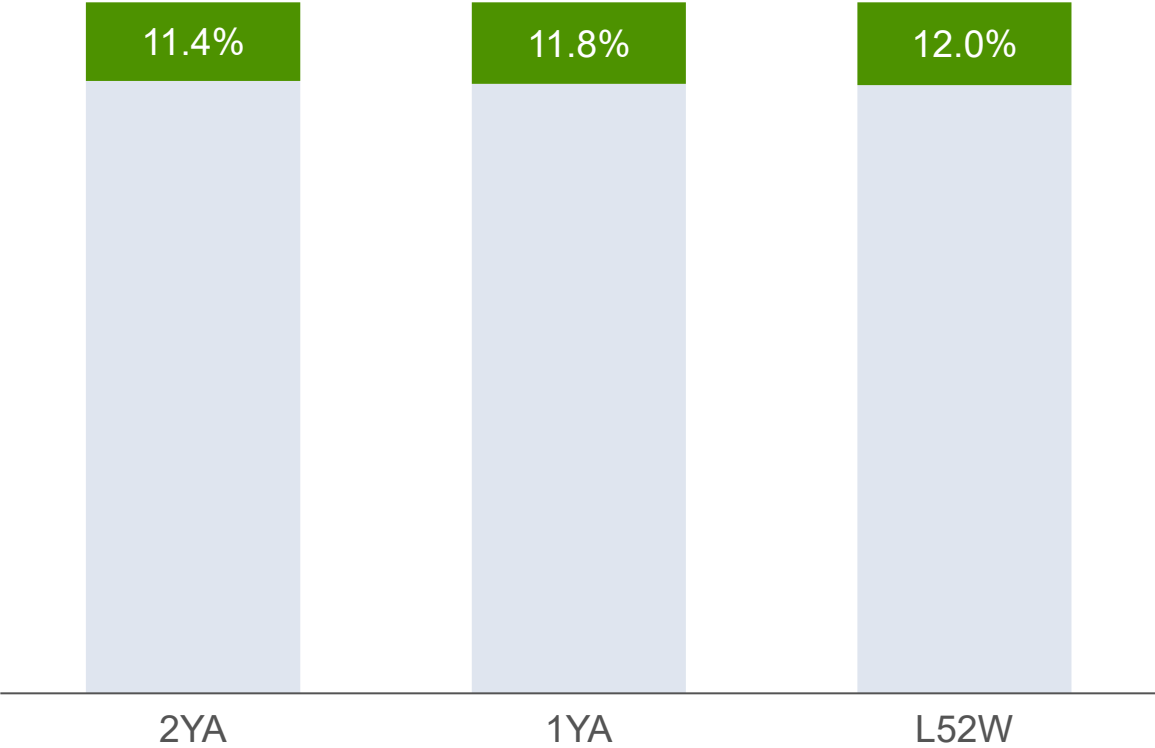
of U.S. households
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Source: NIQ, Expanded Omni Shopper Panel On Demand, Powered By Product Insights, Fruit + Vegetables, PI Organic Positioning STTD, Total US, Total Outlets, 52-Weeks Ending 5/16/2026

The result: continued share growth

Dollar Share Of Fruit & Vegetables

Organic Conventional

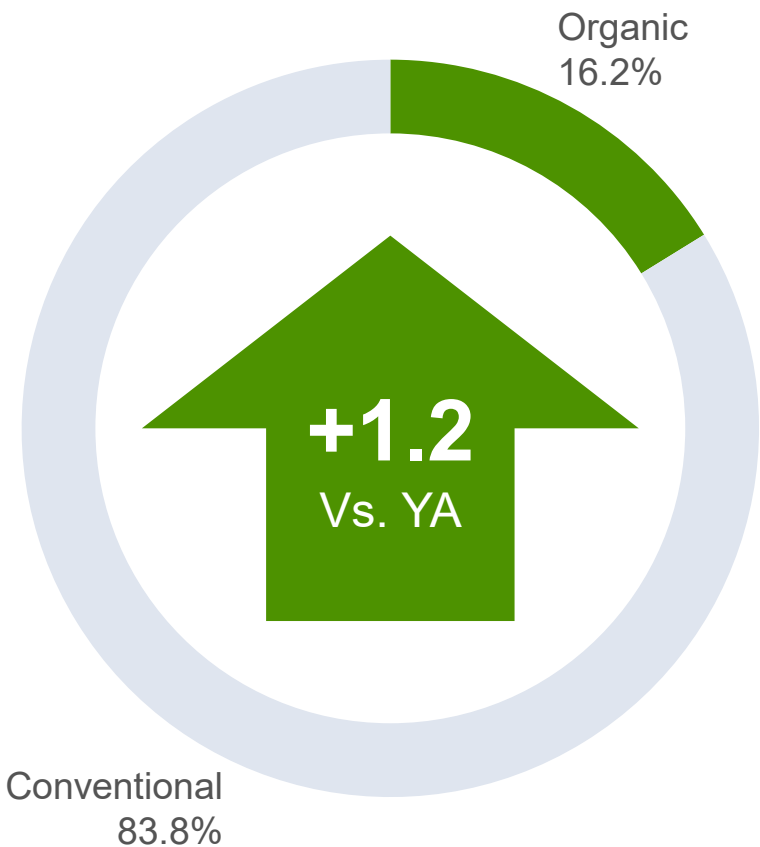


Source: NIQ, RMS Incl. Non-UPC, Powered By Product Insights, Fruit + Vegetables, PI Organic Positioning STTD, Total US Full View, 52-Weeks Ending 6/13/2026

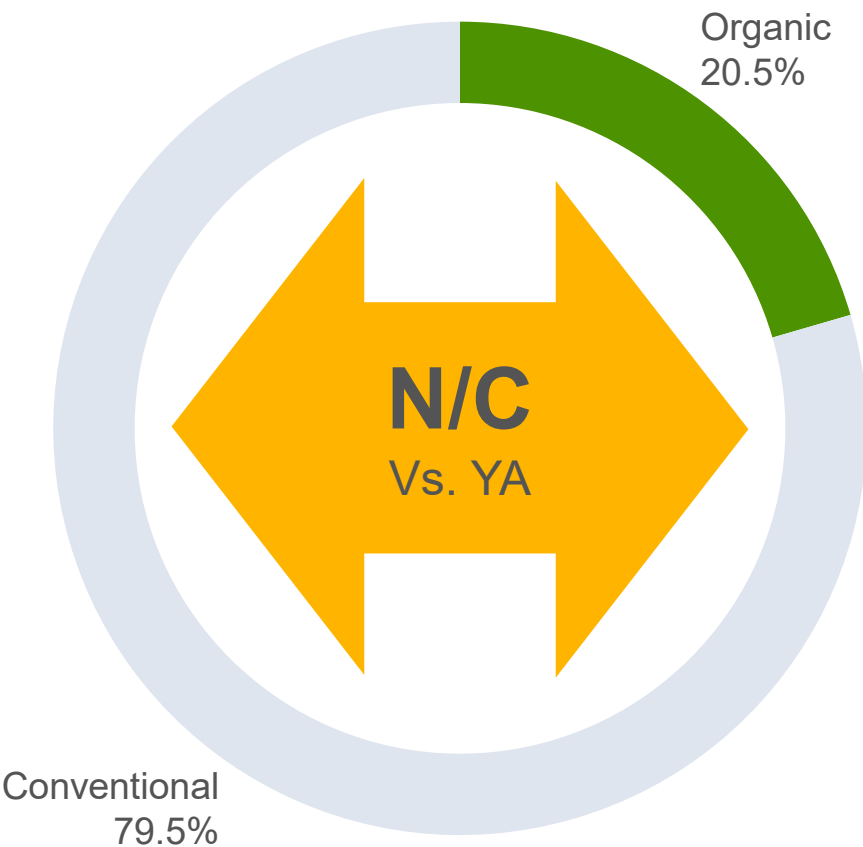


The opportunity: be in the basket more often

Dollar Loyalty To Organic Produce



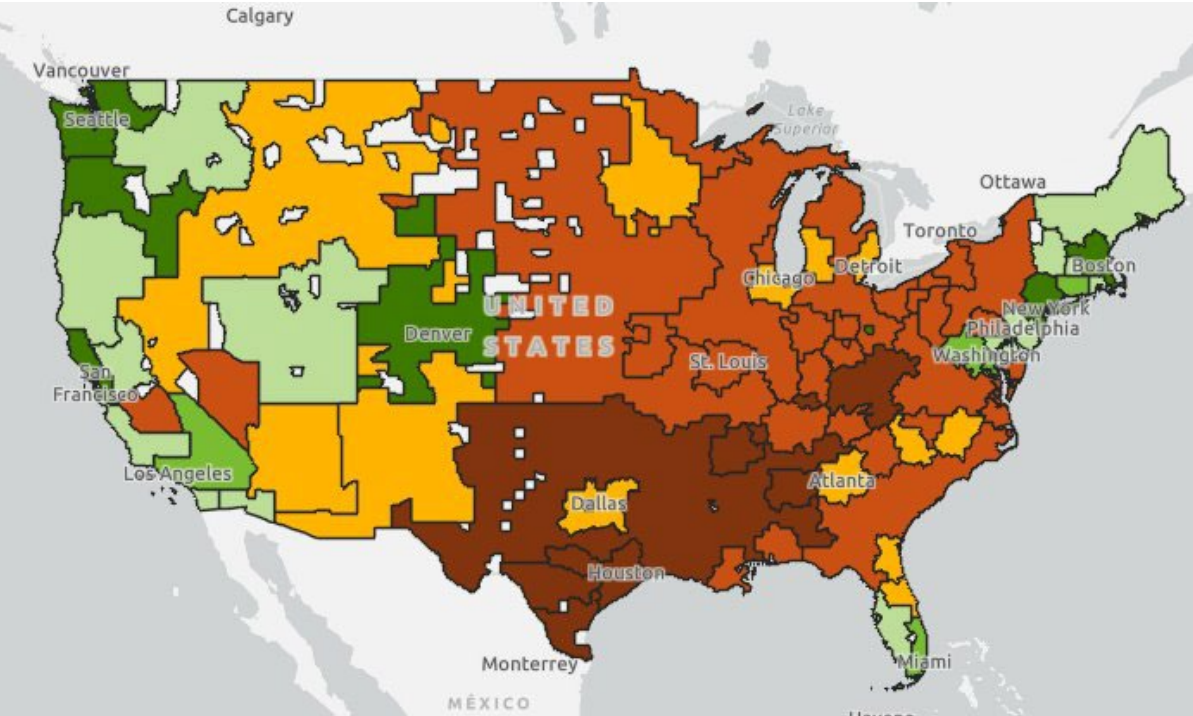
Trip Loyalty To Organic Produce



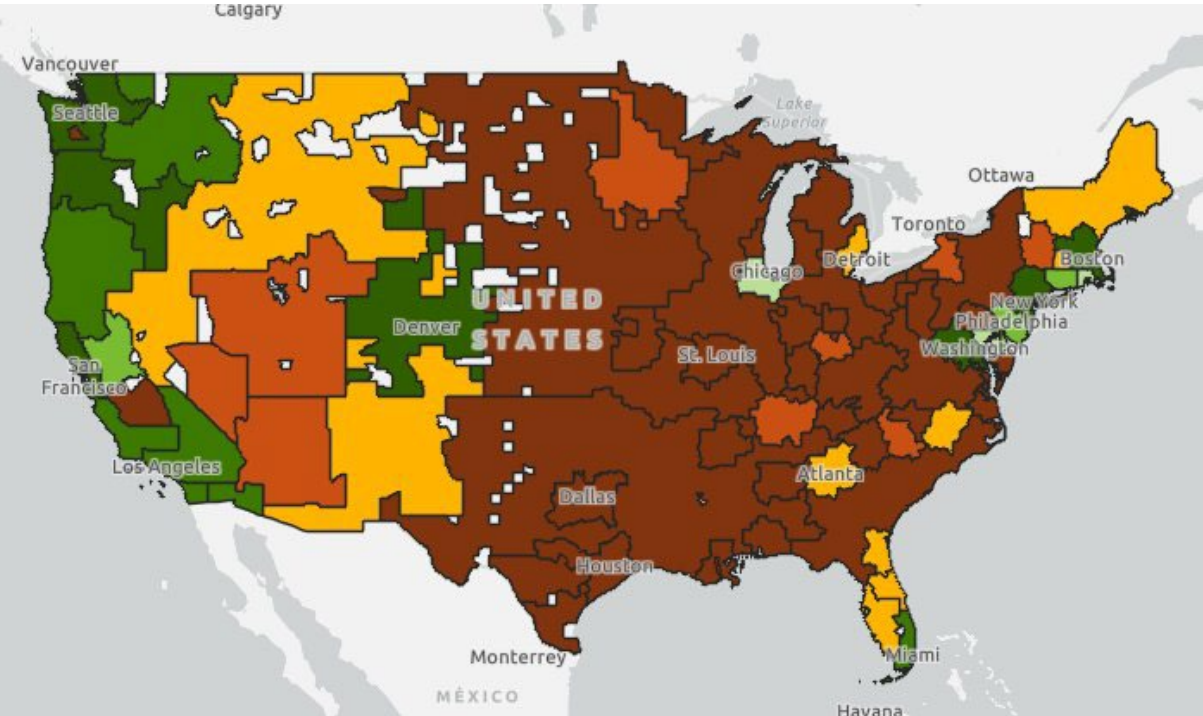
Source: NIQ, Expanded Omni Shopper Panel On Demand, Powered By Product Insights, Fruit + Vegetables, PI Organic Positioning STTD, Total US, Total Outlets, 52-Weeks Ending 5/16/2026

There is significant opportunity for produce across the country

Development Of Fruit & Vegetables



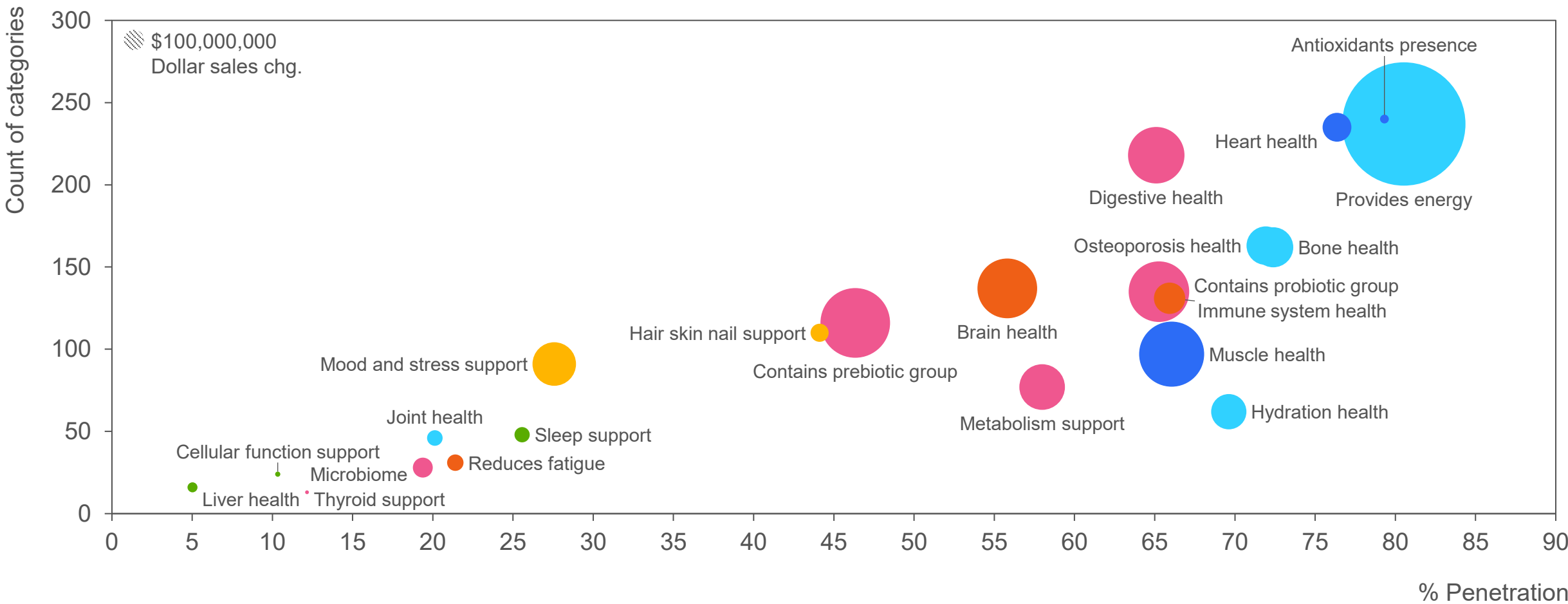
Development Of Organic Fruit & Vegetables



Source: NIQ, RMS Incl. Non-UPC, Total US xAOC Markets, 52-Weeks Ending 6/27/2026

Food as medicine is moving mainstream

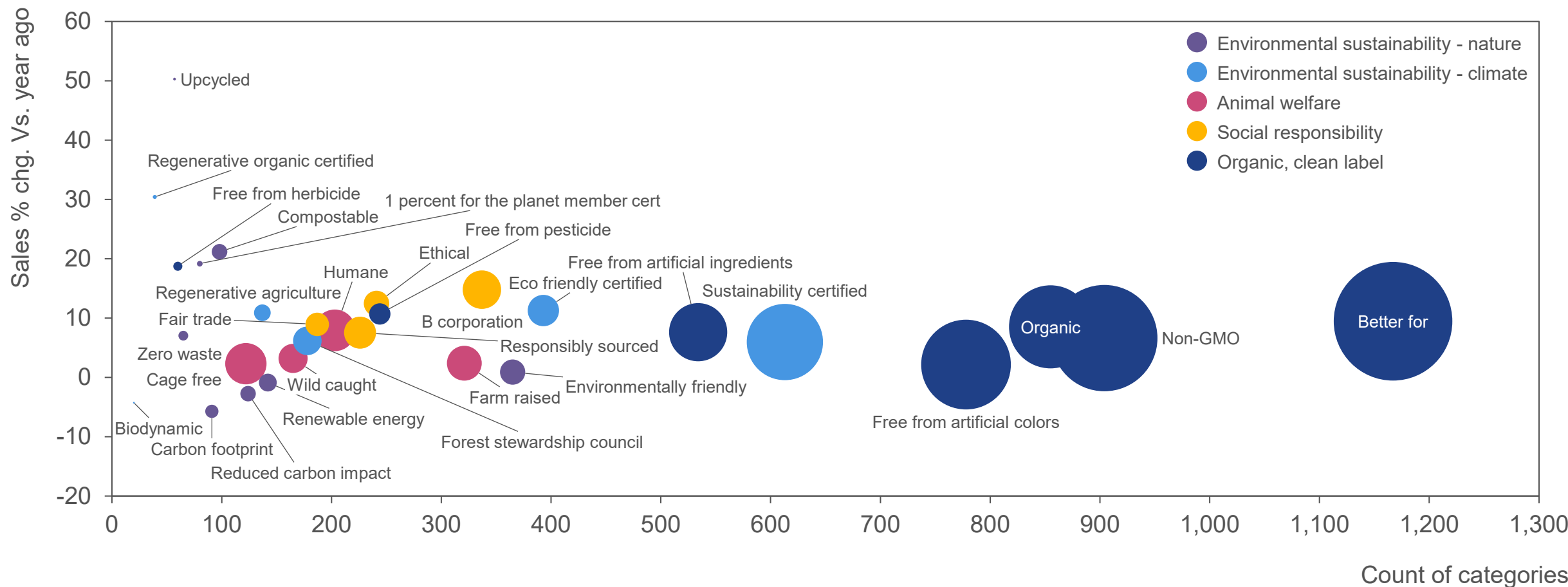
Food & Beverage Attribute Opportunities



Source: NIQ, RMS, Full View Market + Convenience + Costco + Military OCONUS, 52 w/e 05/02/26; Household Penetration – NIQ Omnishopper; Total US, Total Store - NPI STTD claims, 52 weeks w/e 04/18/26

The package translates farming practices into the shopper's language

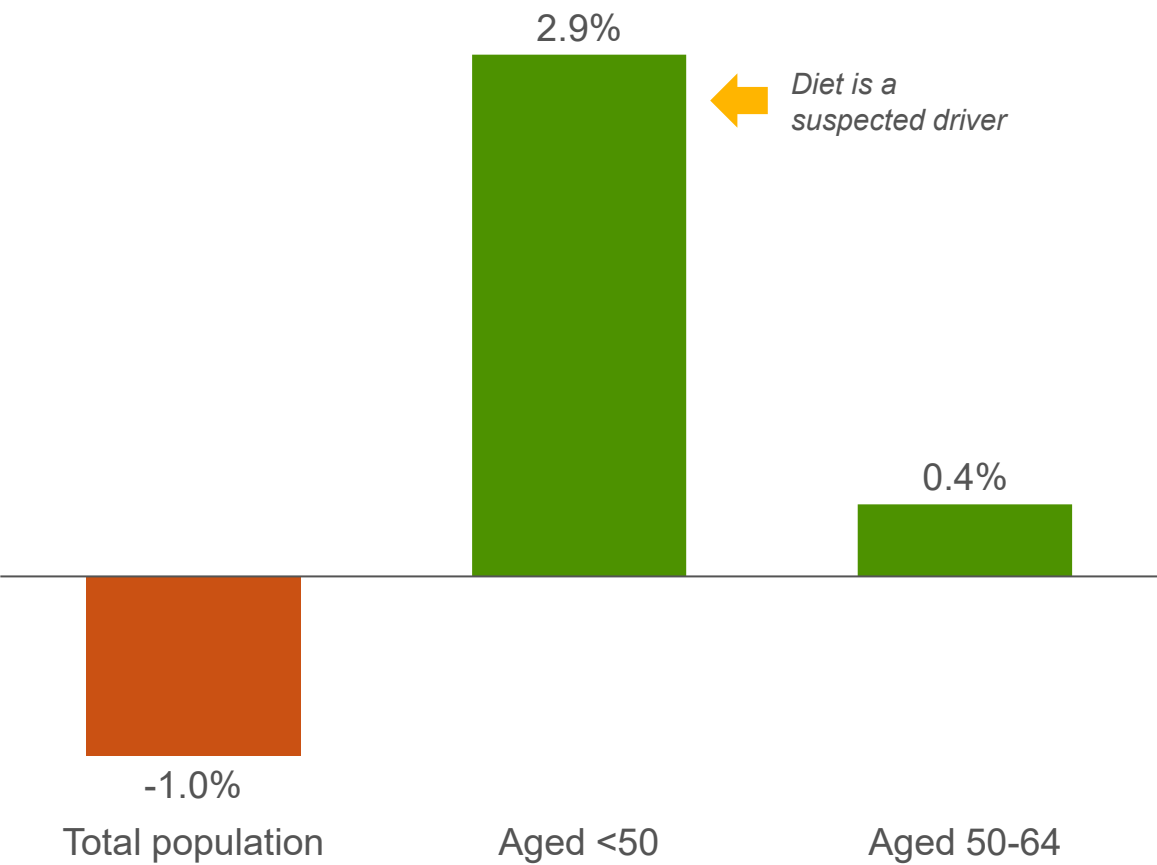
Food & Beverage Attribute Availability



Source: NIQ Retail Measurement, NIQ Product Insight—powered by Label Insight, Total US Full View; Total F&B Departments; Count of categories, % \$ Chg vs. YA; 52 weeks ending 21/03/26
Note: Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol

Incidence of colorectal cancer is increasing

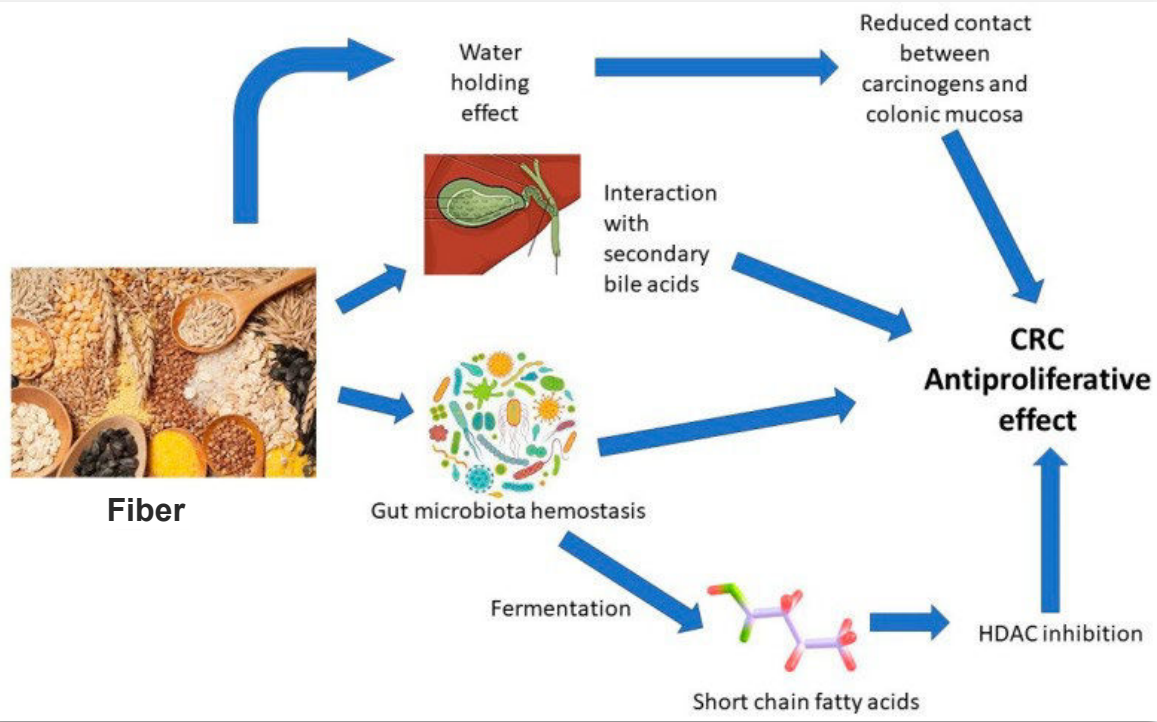
Change In Colorectal Cancer Incidence, 2013-2022
Reported As The Per Year Percent Change



Source: American Cancer Society, Key Statistics for Colorectal Cancer (January 2026).

Fiber may play an important preventive role

Fiber's Role In The Prevention Of Colorectal Cancer



Source: Celiberto F. et al., Fibres and Colorectal Cancer: Clinical and Molecular Evidence, Int. J. Mol. Sci., 2023 (Fig. 2).

Fiber is gaining consumers' attention

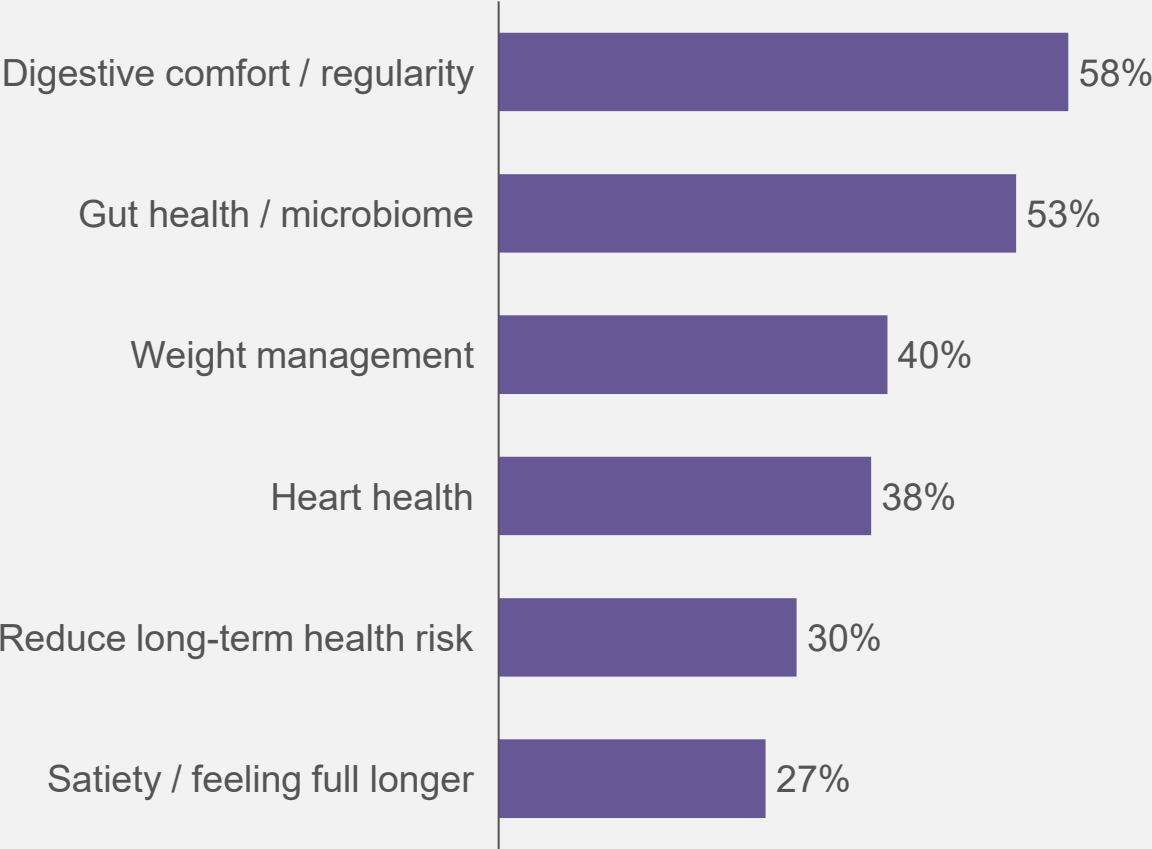
50%

of consumers are making an intentional effort to eat more fiber every day

Source: NIQ, BASES Quick Question Fiber Survey, n=2,029, 2026

Digestion & gut health are leading motivators

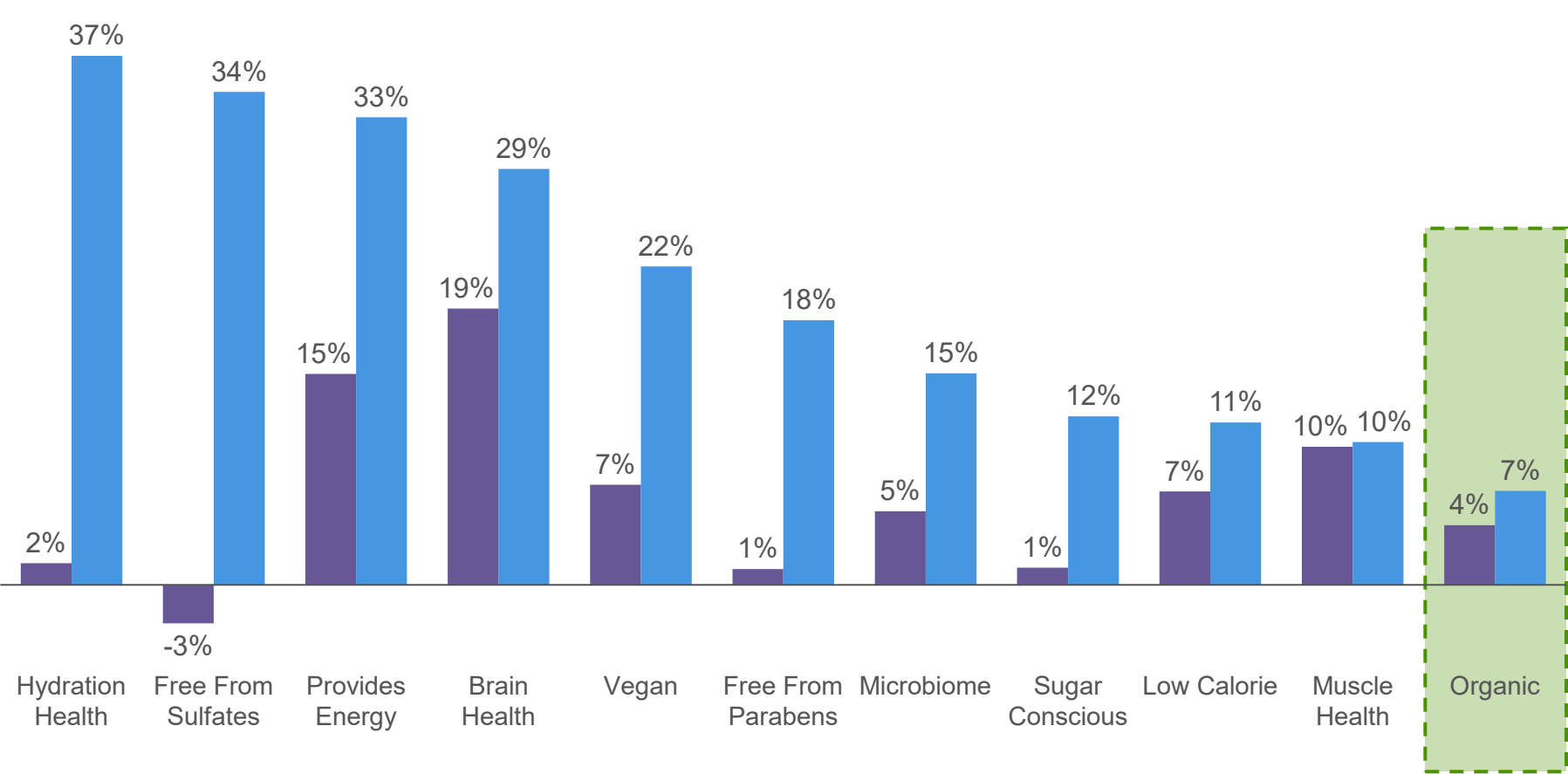
Leading Reasons For Increased Fiber Consumption



Intentionality is on the rise, especially among GLP-1 households

Total Store Sales Performance

Non-users GLP-1 weight loss



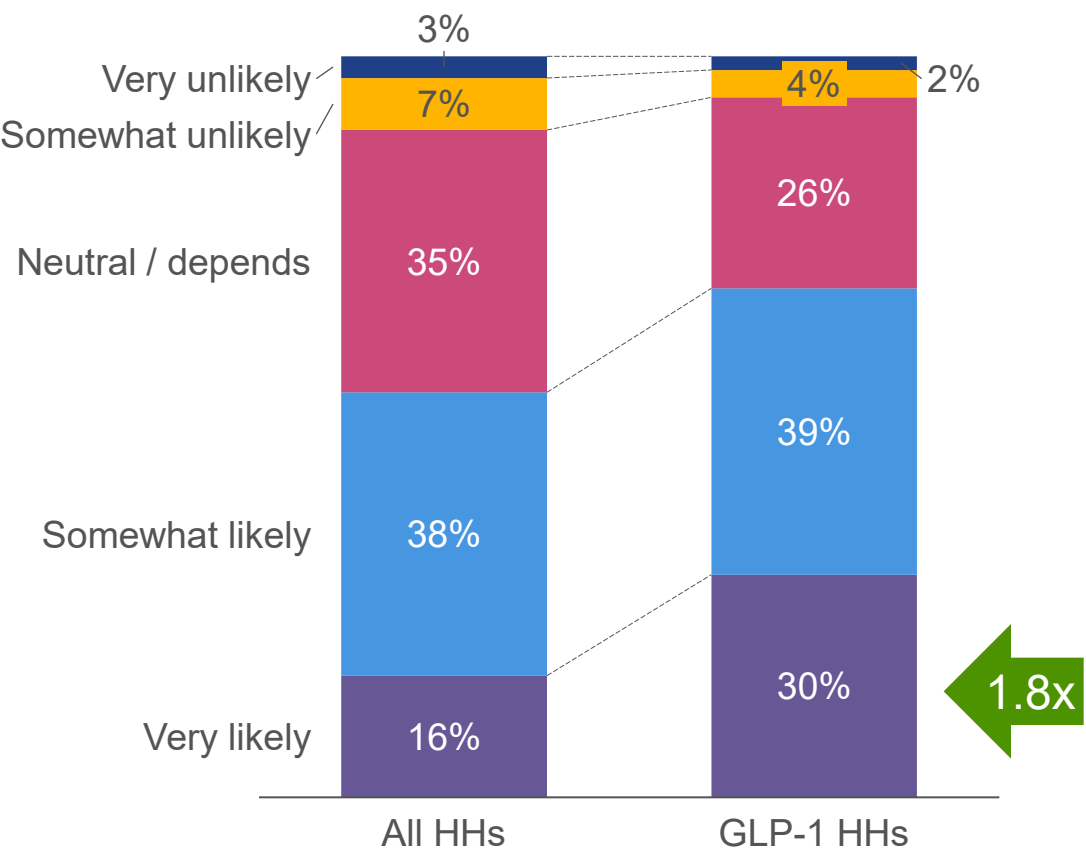
Important Attributes For GLP-1 HHs When Choosing Snacks

High protein content	43%
Natural ingredients	33%
Low sugar content	33%
Low calorie content	29%
Not ultra-processed	25%
High fiber content	24%
Non-GMO	22%
No artificial additives/preservatives	20%
Organic	20%
Sustainable packaging	17%
Free from corn syrup	16%
Clean label certified	14%
Gluten-free	14%
Locally sourced ingredients	12%
Dairy-free	12%
Free from seed oils	10%
Nut-free	9%
Other	6%

Source: NIQ, Homescan GLP-1 Panel Survey (Jan/Feb 2026); Total US; Total Outlets; Total Food & Beverage; Product Insight stated claims on package; Unit % Change, 52 weeks ending February 21, 2026
NIQ Omnibus, March 2026: When choosing a snack, which of the following factors are important to you?

GLP-1 users will trust the unfamiliar

Choosing Unfamiliar AI-Recommended Food / Beverage

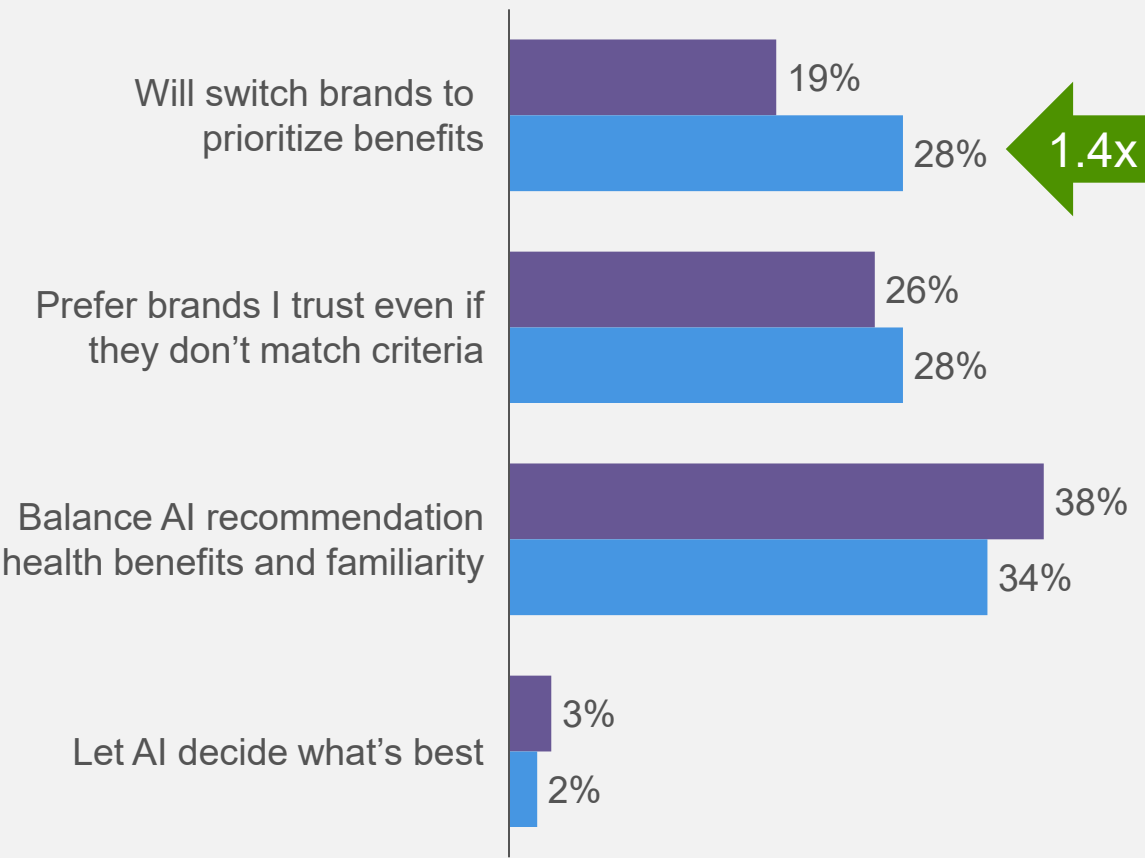


AI rewires brand loyalty

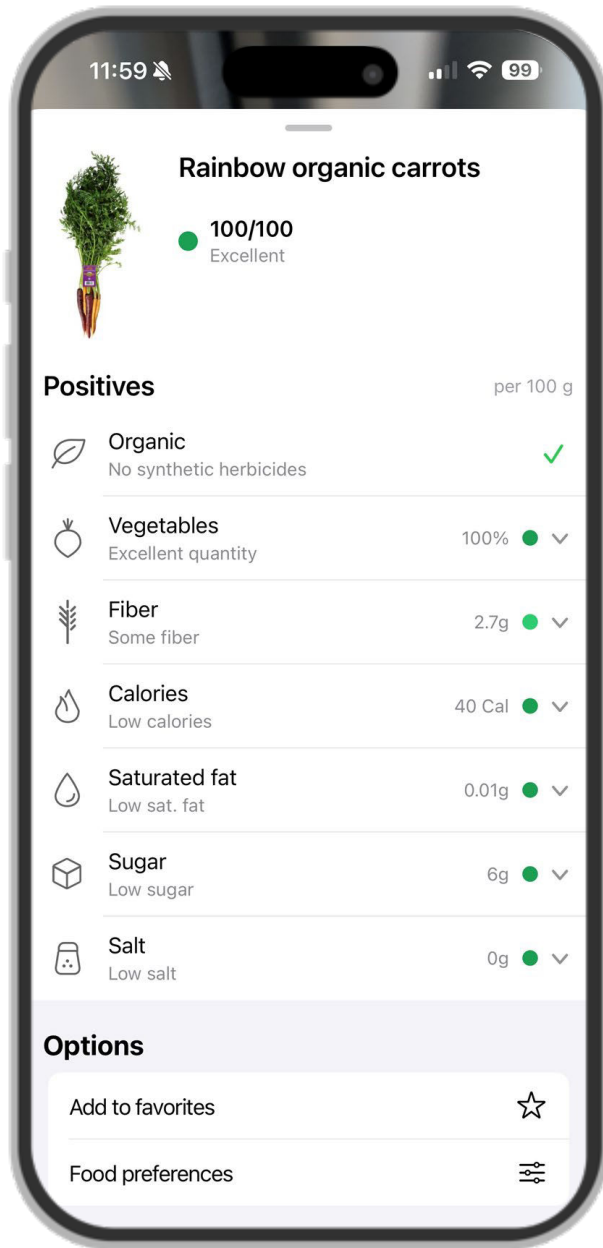
Trade-Offs When Shopping With AI

Among Those Who Use AI To Help With Food & Beverage Shopping

All HHs GLP-1 HHs



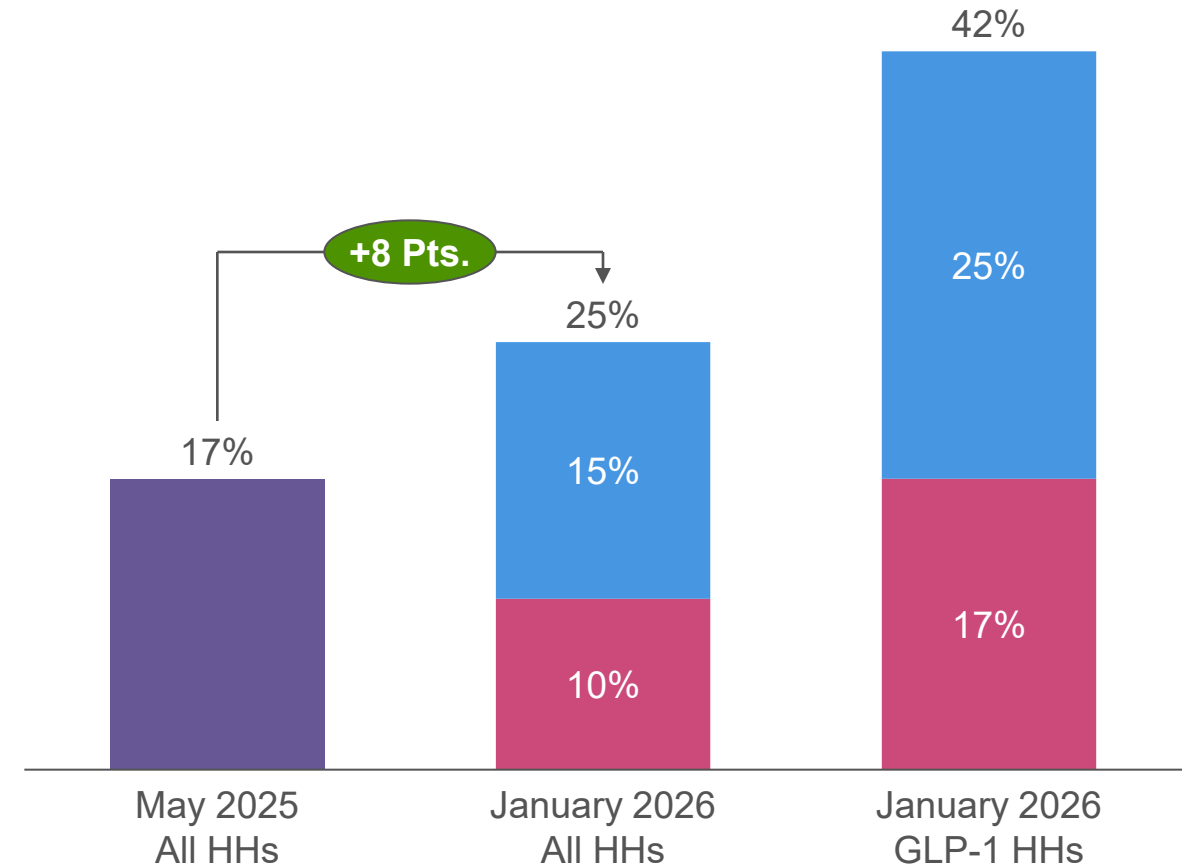
Source: NIQ, BASES Snacking Survey, n=2,009, 2026



It's not just AI

Use Third Party Scan Apps To Check Ingredients

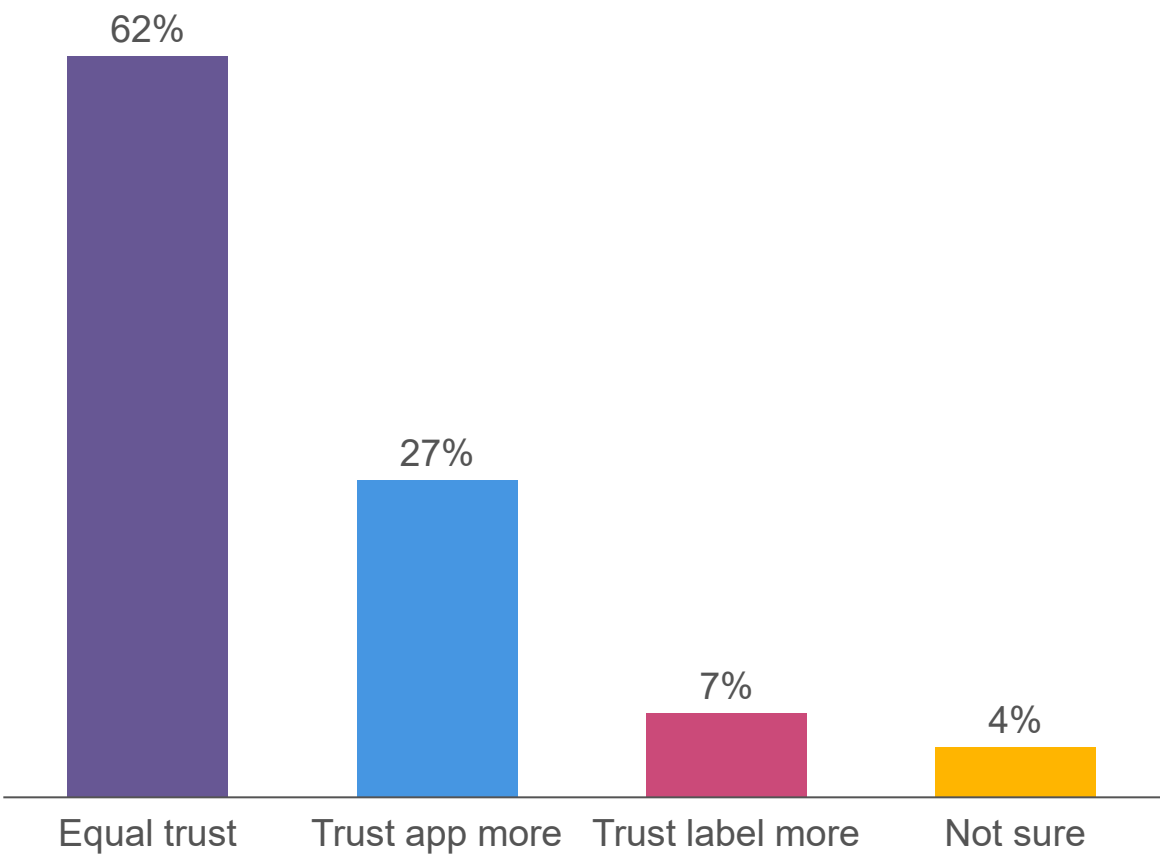
Any use Use occasionally Use regularly



Source: NIQ, BASES Quick Question Omnibus Survey, n=1,000, May 2025 Vs. n=2,006, January 2026

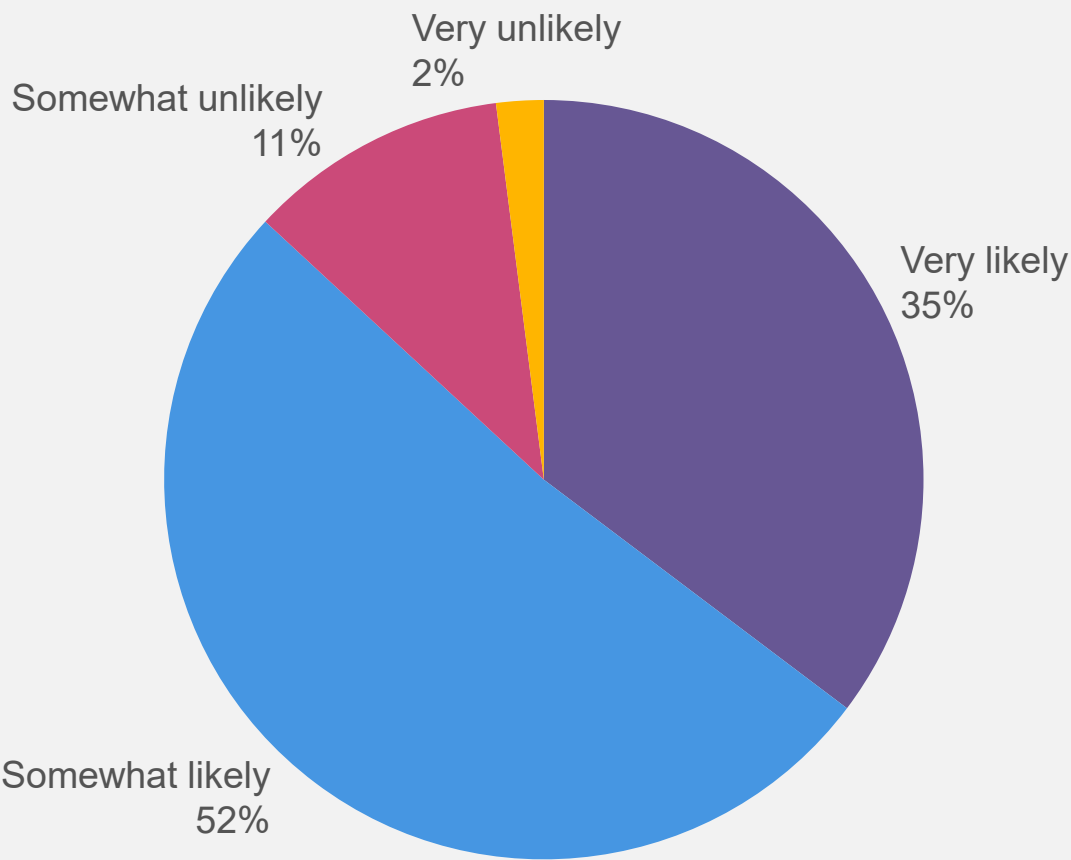
Apps are shattering trust

Level Of Trust
Among App Users



Low scores get put back on the shelf

Likely To Put Low Score Items Back
Among App Users



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

Quality drives trust

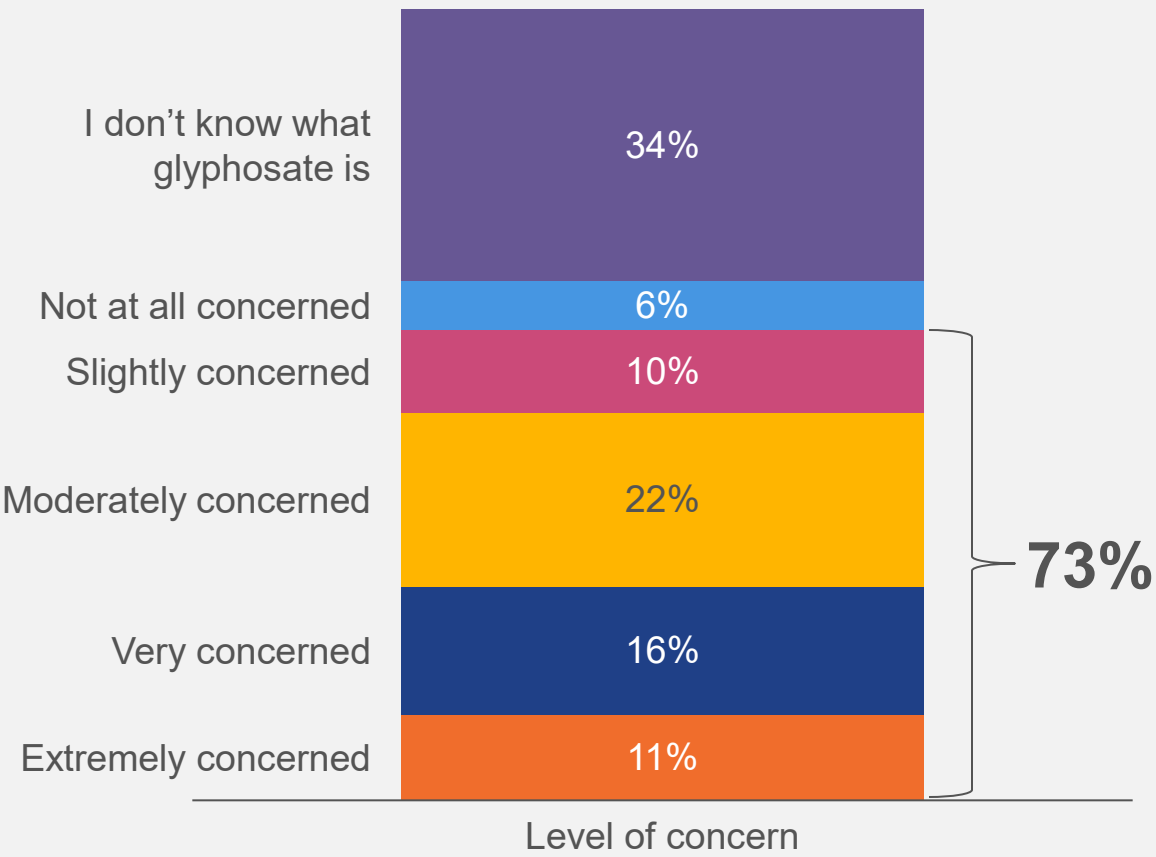
Drivers Of Food Brand Trust



Source: NIQ, BASES Quick Question Omnibus Survey, May 2025, n=1,000

Glyphosate drives concern

Concern About Glyphosate Usage



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,024, March 2026

Chemical concern claims are expanding across the store

Top 15 Super-Categories With Selected Claims

ORGANIC

693
categories

- 1. Fruit
- 2. Vegetables
- 3. Fresh Meat
- 4. Beverages
- 5. Milk Products
- 6. Prepared Foods
- 7. Eggs
- 8. Diet And Nutrition
- 9. Salty Snacks
- 10. Yogurt
- 11. Vitamins And Supplements
- 12. Cereal And Granola
- 13. Packaged Coffee
- 14. Extracts, Herbs, Spices And Seasonings
- 15. Baby Feeding

FREE FROM PESTICIDE

264
categories

- 1. Milk Products
- 2. Vegetables
- 3. Feminine Care
- 4. Yogurt
- 5. Eggs
- 6. Baby Feeding
- 7. Cereal And Granola
- 8. Vitamins And Supplements
- 9. Oils/Butter/Margarine Spreads/Substitutes
- 10. Pest Control
- 11. Creams And Non-Dairy Creamer
- 12. Fruit
- 13. Extracts, Herbs, Spices And Seasonings
- 14. Formula And Children's Nutritional Beverages
- 15. First Aid

FREE FROM HERBICIDE

62
categories

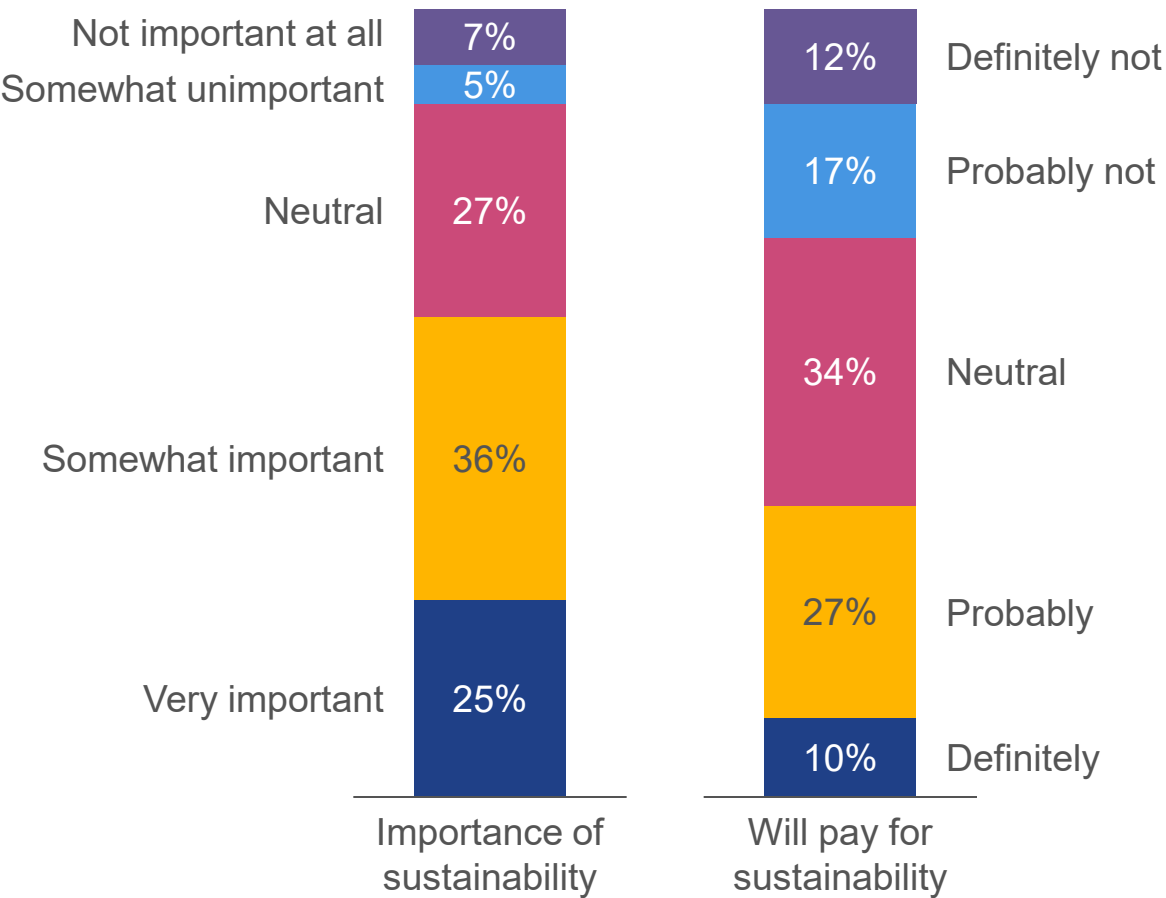
- 1. Vegetables
- 2. Cereal And Granola
- 3. Cookies And Crackers
- 4. Fresh Meat
- 5. Diet And Nutrition
- 6. Baking Mixes
- 7. Eggs
- 8. Snack & Variety Packs
- 9. Sugar And Sweeteners
- 10. Vitamins And Supplements
- 11. Extracts, Herbs, Spices And Seasonings
- 12. Pasta, Rice, Dry Beans & Grains
- 13. Beverages
- 14. Fruit
- 15. Milk Products

Source: NIQ, Retail Measurement Services – NIQ Product Insight; Total US Full View Measurement + Costco; Total Store (Top Categories >\$1K sales); Total Dollars; 52 weeks ending May 30, 2026



Shoppers are thinking about sustainability

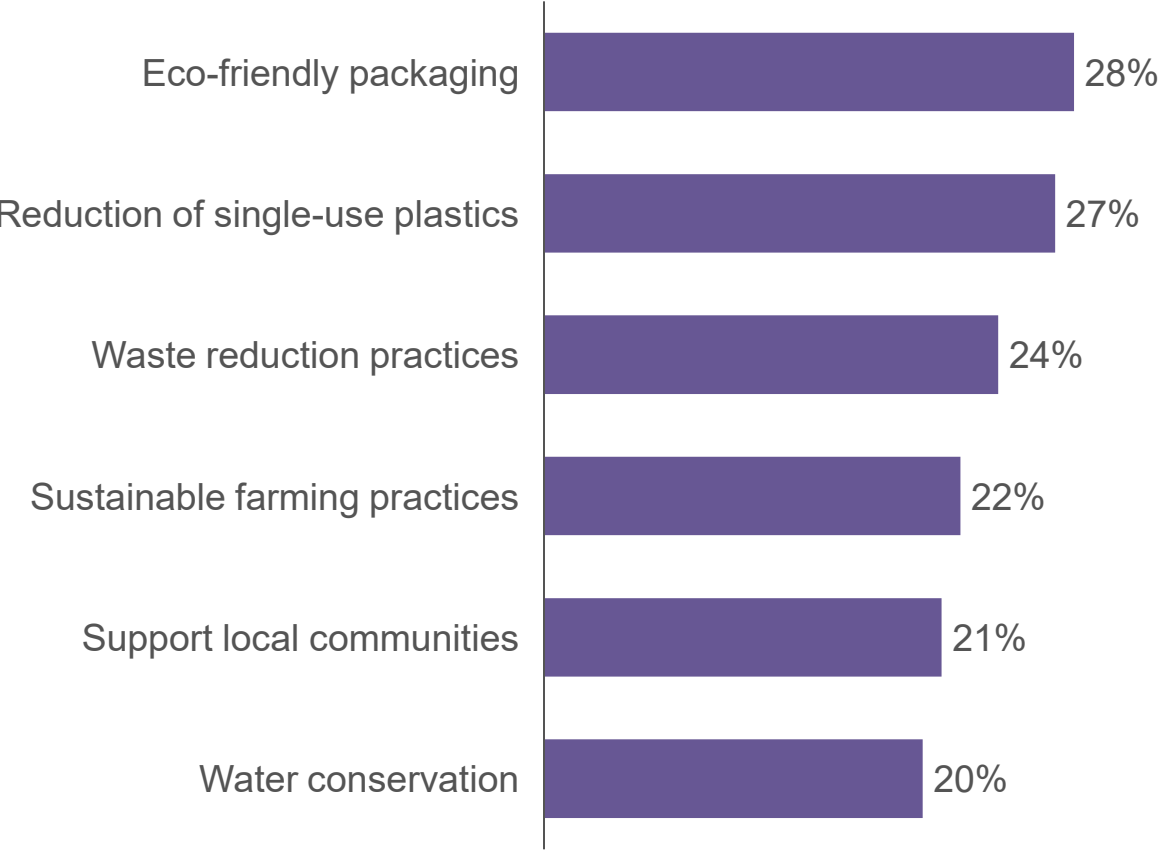
Importance Of And Willingness To Pay For



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, February 2026

Brands need to lean in on what matters

Sustainability Purchase Influencers



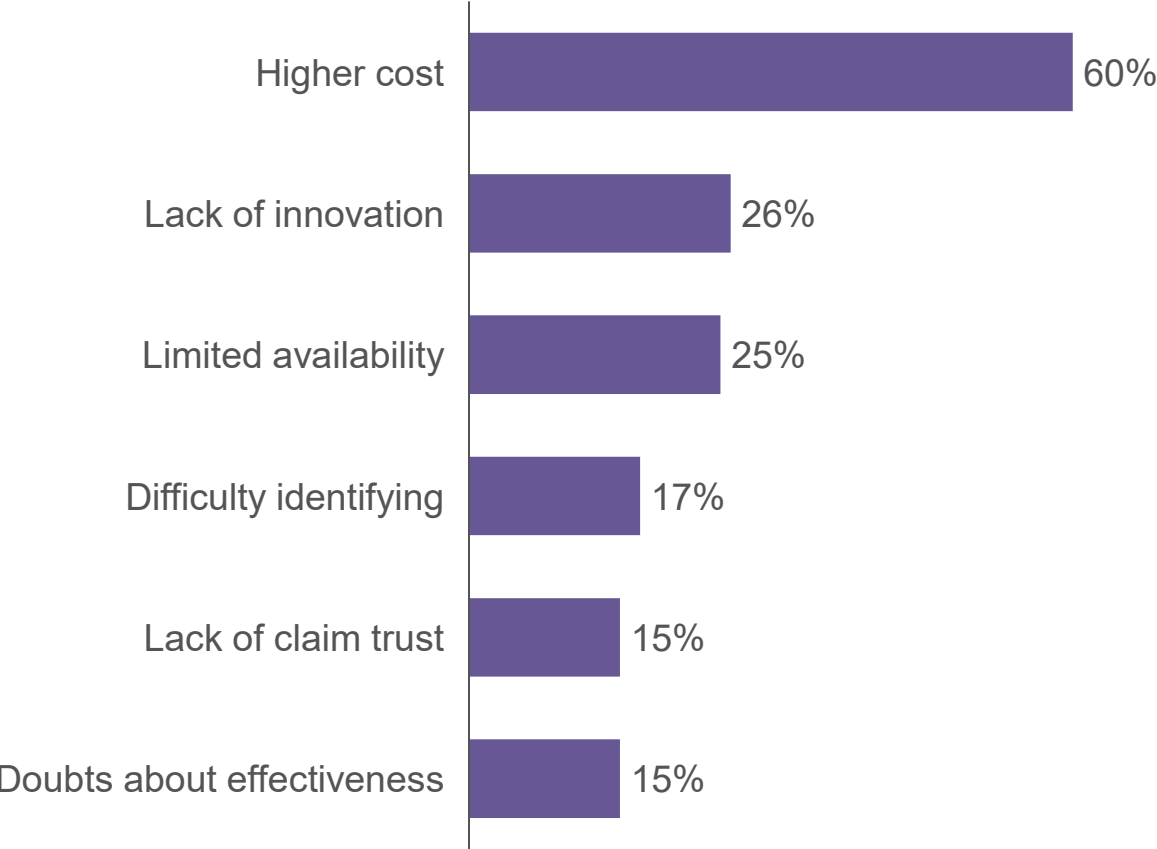
Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, February 2026





Retailers need to tear down barriers

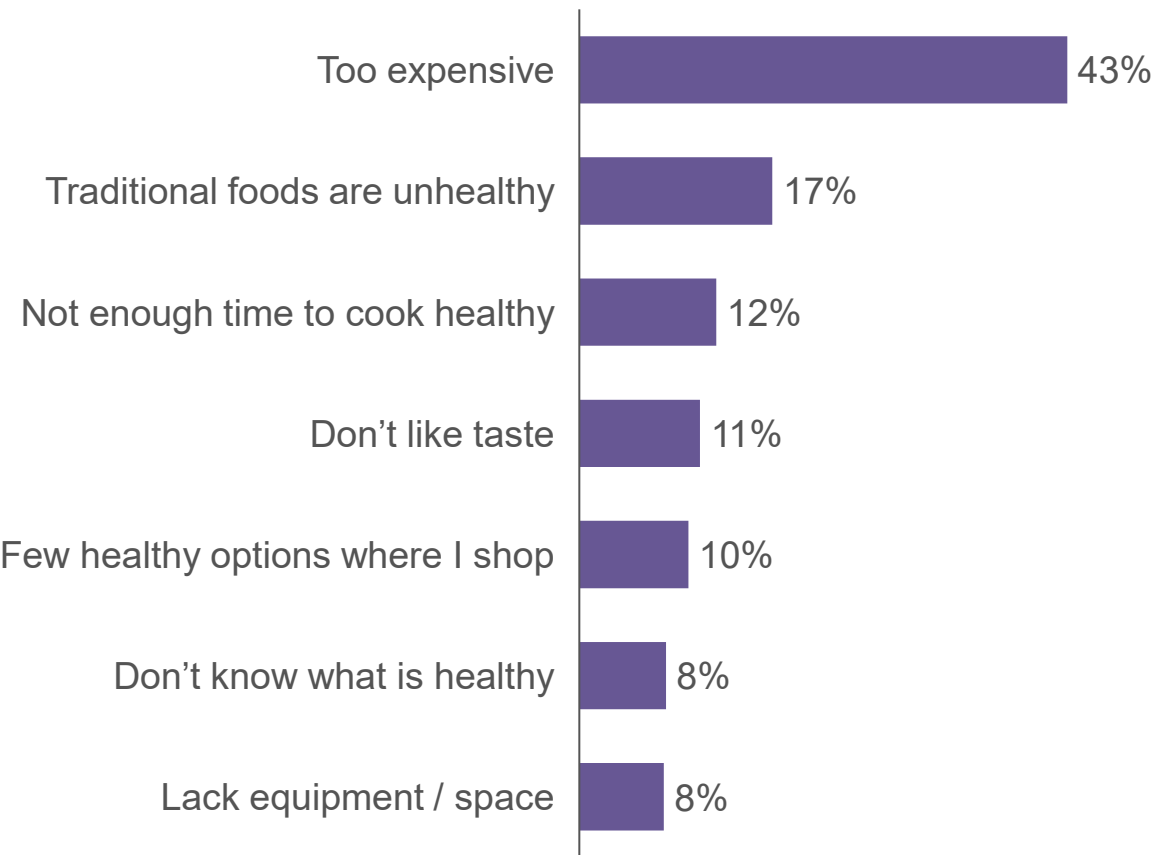
Barriers To Buying Sustainable Food Products



Source: NIQ, BASES Quick Question Omnibus Survey, n=2,006, February 2026

Price is a barrier to healthy eating

Leading Reasons For Eating Unhealthy Foods

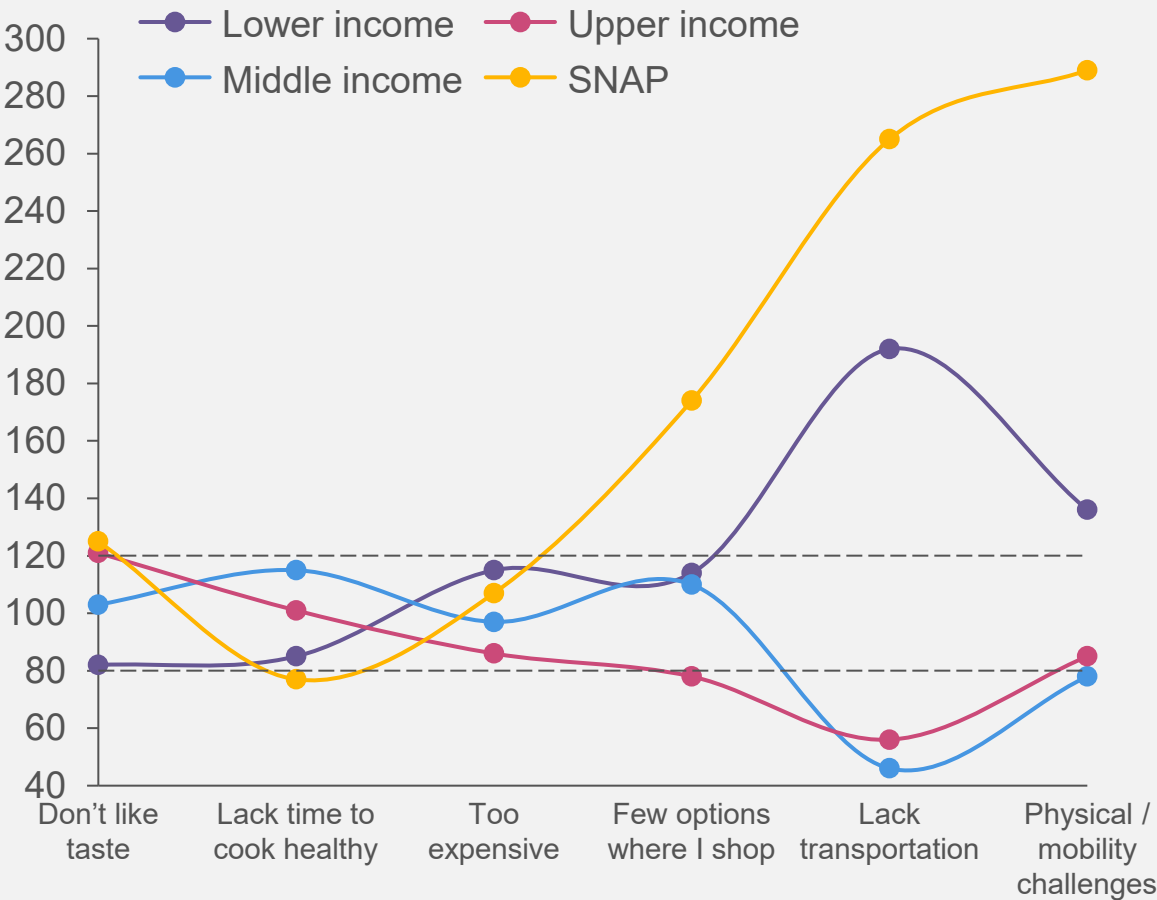


Source: NIQ, BASES Quick Question Survey, n=2,022, June 2026

So is access

Reasons For Eating Unhealthy Foods, By Income

Indexed To Total Respondents

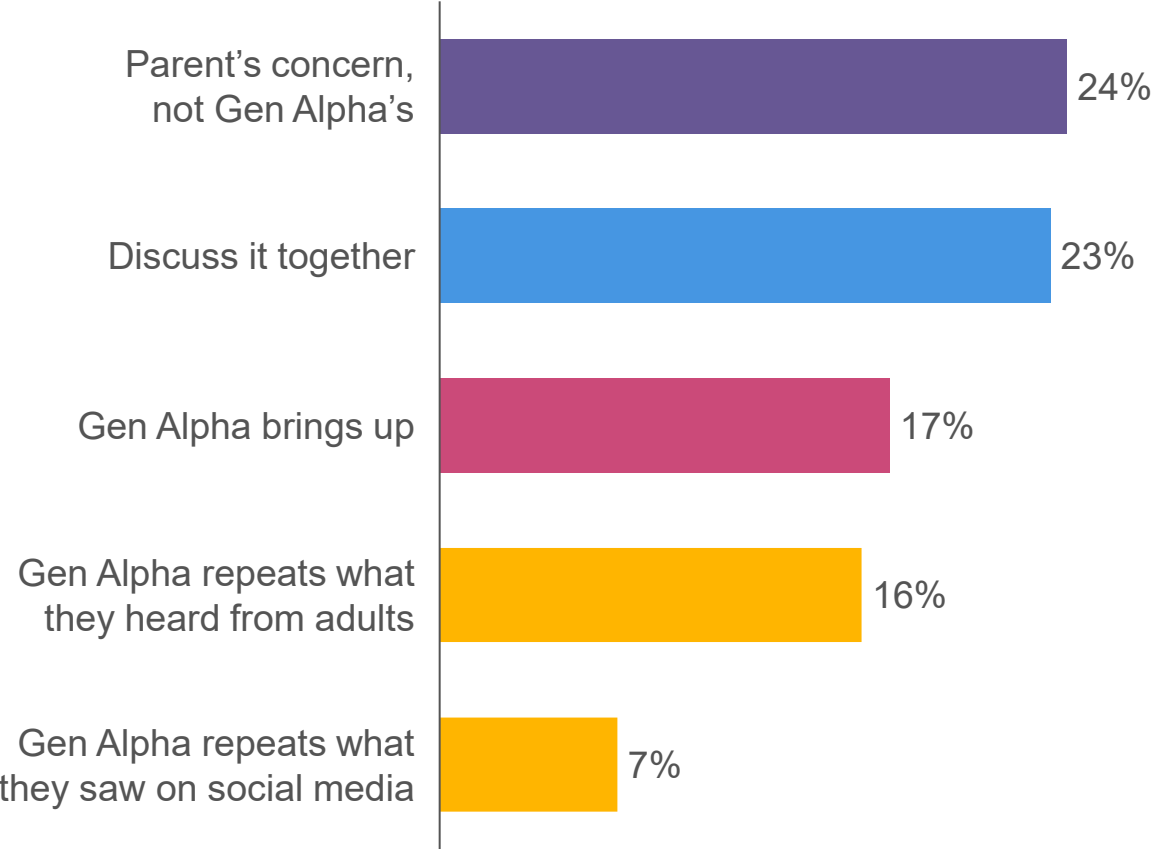




Gen Alpha isn't waiting around

Who Brings Up Health Benefits When Buying Snacks

Among HHs With Gen Alpha Children Present

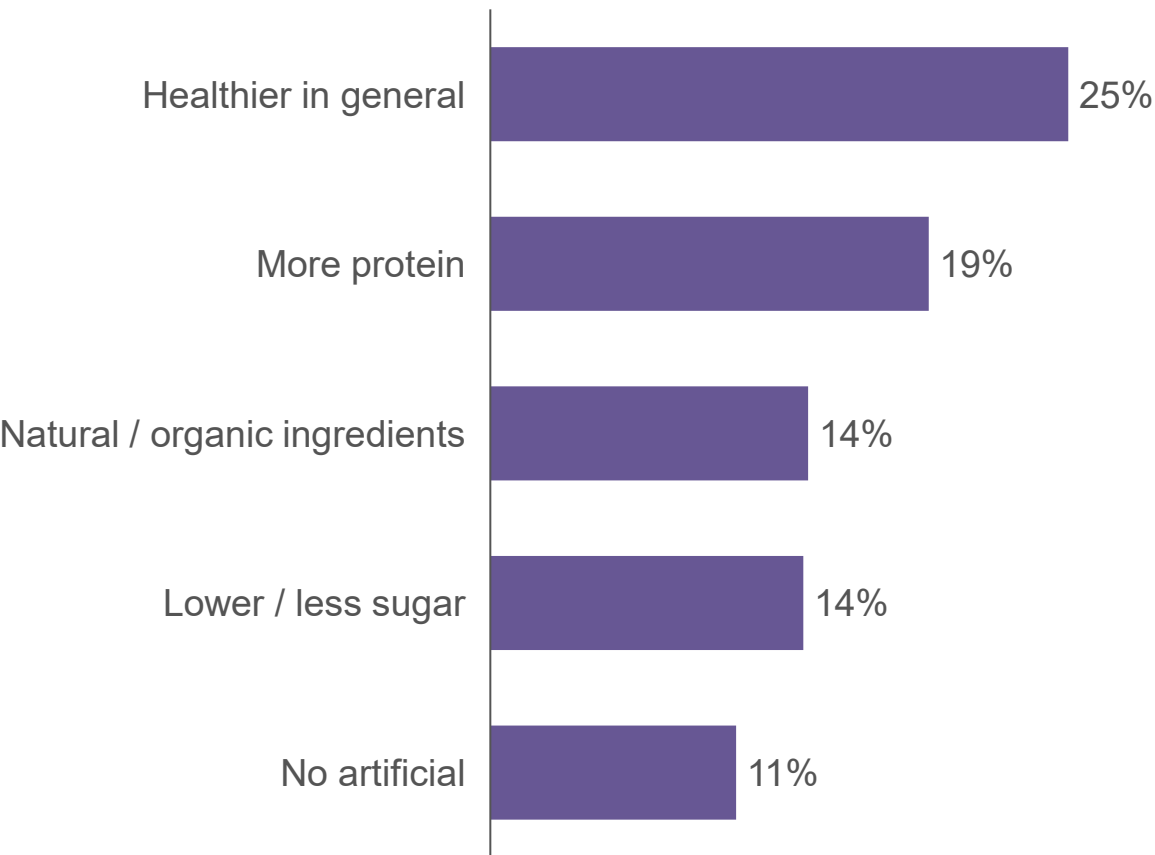


Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026

They are asking for healthier options

Specific Gen Alpha Health-Related Snacking Asks

Among HHs With Gen Alpha Children Present



Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026

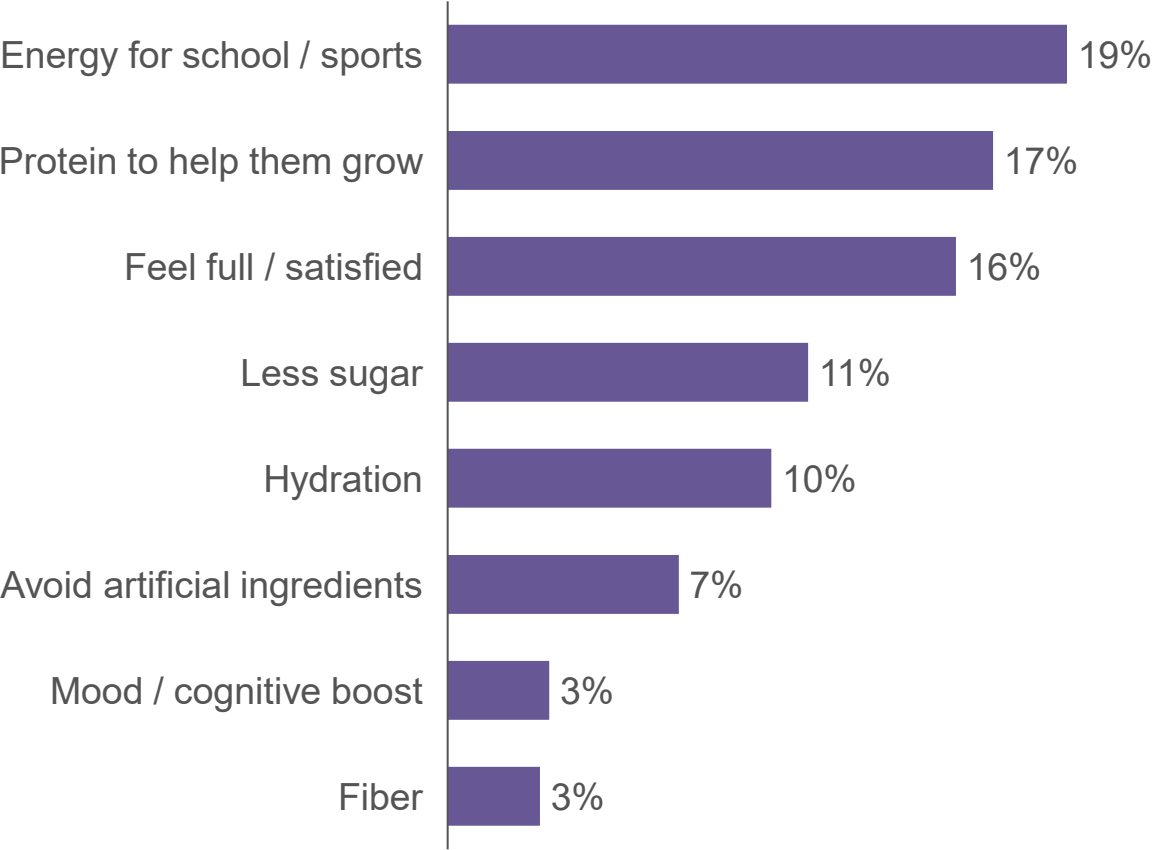




Gen Alpha is going to set a higher standard

Leading Aspect Of Health / Ingredients For Gen Alpha

Among HHs With Gen Alpha Children Present



Source: NIQ, BASES Quick Question Survey, n=2,009, May 2026
Note: *Among HHs with Gen Alpha present, where Gen Alpha is focused on specific health benefits from snacks



Chris Costagli
VP, Thought Leadership
NIQ



Alan Lewis
VP, Gov. Affairs, Food & Ag. Policy
Natural Grocers



Michelle McCarty
Senior Program Manager
Brighter Bites



Sam Knowlton
Founder & Managing Director
SoilSymbiotics



Lael Gerhart
Partnerships & Engagement
Frog Hollow Farm

Organic produce has the advantage



Health is becoming the primary lens through which many consumers evaluate food purchases.



Organic produce sits at the intersection of multiple growth trends: food as medicine, GLP-1 lifestyles, personalized nutrition, preventative health, and sustainability.



Winning requires translation of complex health science into simple consumer benefits that consumers can understand and act on.



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10 ops YEARS

