



U.S. Honey Consumer A&U

June 30, 2023

TABLE OF CONTENTS

- 3** Objectives and Methodology
- 6** Executive Summary: Findings & Implications, Fast Facts
- 12** The Sweetener Landscape: Attitudes, Awareness, and Usage
- 34** The Sweetener Landscape: Path to Purchase
- 45** Evolving Priorities and Alternatives: Sustainability Perceptions





OBJECTIVES & METHODOLOGY



Objectives and Methodology

This study, fielded annually since 2016, aims to understand consumer dynamics by:

- Tracking awareness, self-reported usage, and attitudes and perceptions of honey and other sweeteners
- Assessing emerging issues including domestic supply constraints, future competition from synthetics

Results help guide program strategies and messaging and gauge program effectiveness

Methodology:

- An online survey fielded May 14-21, 2023 to a total sample of n=2,265 adult food shoppers, including the Goodness Seeker subset (n=379)
- Average length of interview, 23 minutes
- Qualifying respondents were 18-77 years of age, with demographic balance for age/gender, ethnicity, income, household structure, and region
- Based on qualification rates, results are weighted to reflect the actual characteristics of adults who qualify as shoppers (excluding those with allergies to honey)

Icons indicate consumer groups that index at ≥ 120 vs Total

B Boomers

G Goodness Seekers

X Gen X

 Household with kids

M Millennials

Z Gen Z

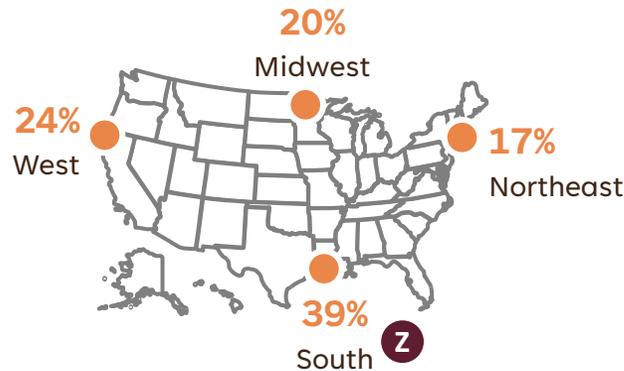
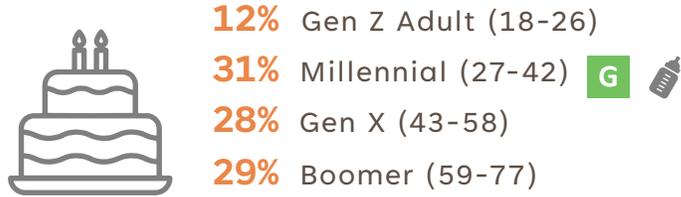
Changes from 2022

2023 data is weighted differently from 2022 and prior years. Where shown, shifts from 2022 are calculated using data weighted to match the 2022 audience to account for this change.

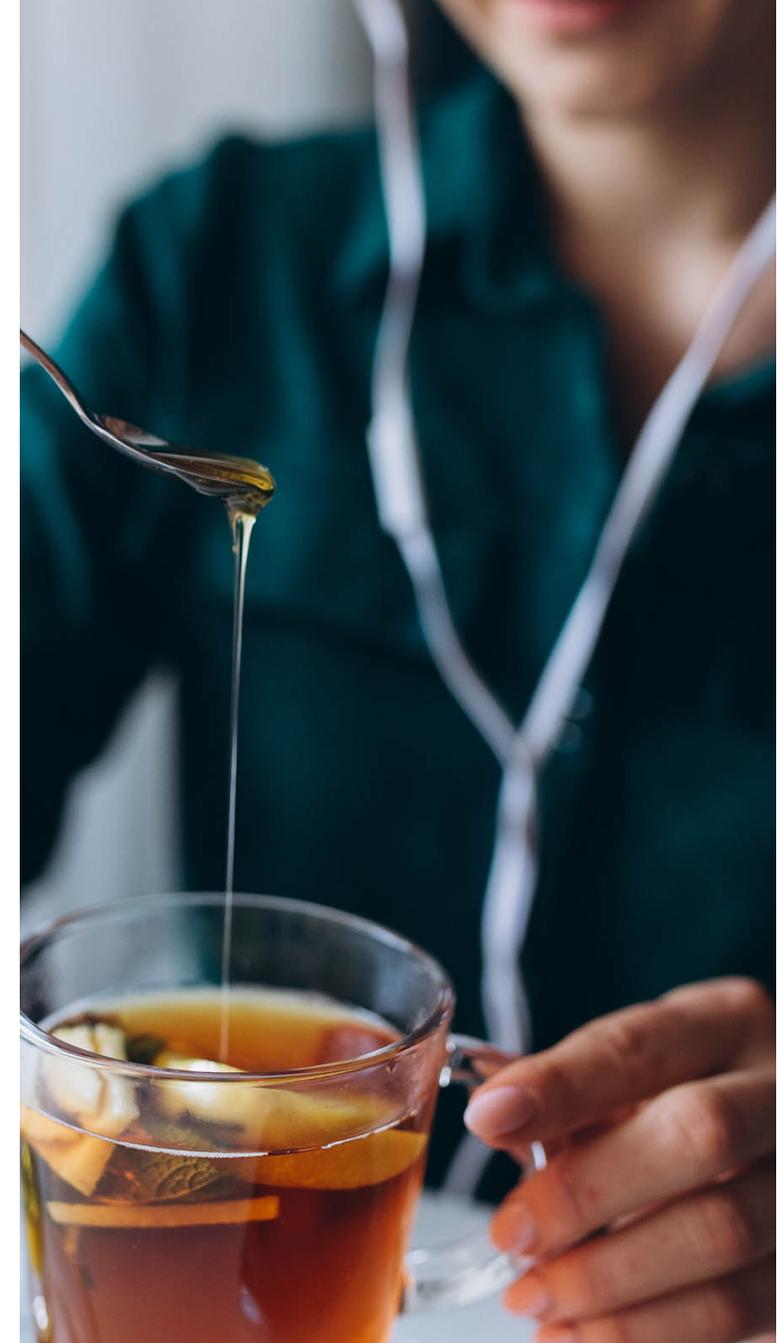
The Goodness Seeker comprises shoppers:

- Focused on health and wellness through eating healthy nutritious organic foods and exercising regularly
- Environmentally conscious
- Engaged with reading labels and actively seeking new and interesting products

Demographics of US Shoppers



B Boomers **X** Gen X **M** Millennials **Z** Gen Z **G** Goodness Seekers Household with kids





EXECUTIVE SUMMARY

FINDINGS & IMPLICATIONS | Attitudes, awareness, usage

Honey continues to enjoy stable, positive associations even as it faces ongoing competition from other sweeteners

- Top-of-mind awareness and preference remain high and steady
- Recall of positive press, stories, etc. about honey has, if anything, improved
- When asked for the "typical" uses for each sweetener they use, shoppers cite the widest range of uses for honey, which puts it head-to-head with different sets of alternatives on any given type of occasion
- Honey is seen as performing well on the characteristics that shoppers generally seek in sweeteners

Instead of thinking of all sweeteners as competing with honey generally, it will be important to consider and market against the competitive set for specific uses, e.g., as stir-ins for tea versus as toppings for scones. This approach should shape merchandising programs and may inspire innovations to align with specific applications.

Underneath honey's perceived versatility, selected occasions support volume growth opportunities

- While breakfast usage is imagined to be "typical," honey appears almost as often at other meals and even more often outside of meals, especially early in the morning and after dinner
- Shoppers who use honey most frequently tend to shop with breakfast and/or snacking uses in mind but then use it in other ways as well
- Usage in beverages and for medicinal reasons have gained relevance during the past year
- While other sweeteners compete for mindshare at breakfast and in beverages, honey has clear advantages for snacking and for wellness usage

Taken together, this implies that honey usage would benefit from reinforcement around the positive, nutritional properties of honey, perhaps framed around medicinal scenarios and healthy snacking.



FINDINGS & IMPLICATIONS | Path to Purchase

Price is currently a more important consideration when shopping, but not at the expense of other honey priorities

- “Price” was already the most widely cited criterion but is now further out ahead of size and brand
- “Pure/unfiltered/raw” has also gained relevance
- Even so, organic and local have lost none of their luster, and the elevated attention to price has not eased other requirements to any meaningful degree
- Shoppers continue to shop for honey at a range of mainstream channels but also at specialty

In the near term, shoppers will tend to want deals and promotions rather than trading down on quality characteristics.

Smaller pack size options may perform better with some segments, depending on how they prioritize price-point versus price-per-ounce and cost versus convenience.

The Goodness Seeker appears to be a prime target for organic or raw private label options and may help stores in mainstream retail channels attract more honey trips.

While the relevance of deals and value sizes may abate with the easing of inflation, the opportunity for quality-distinct private-label shows no signs of being temporary and is therefore a worthwhile investment for select retailers.



FINDINGS & IMPLICATIONS | Sustainability Perceptions

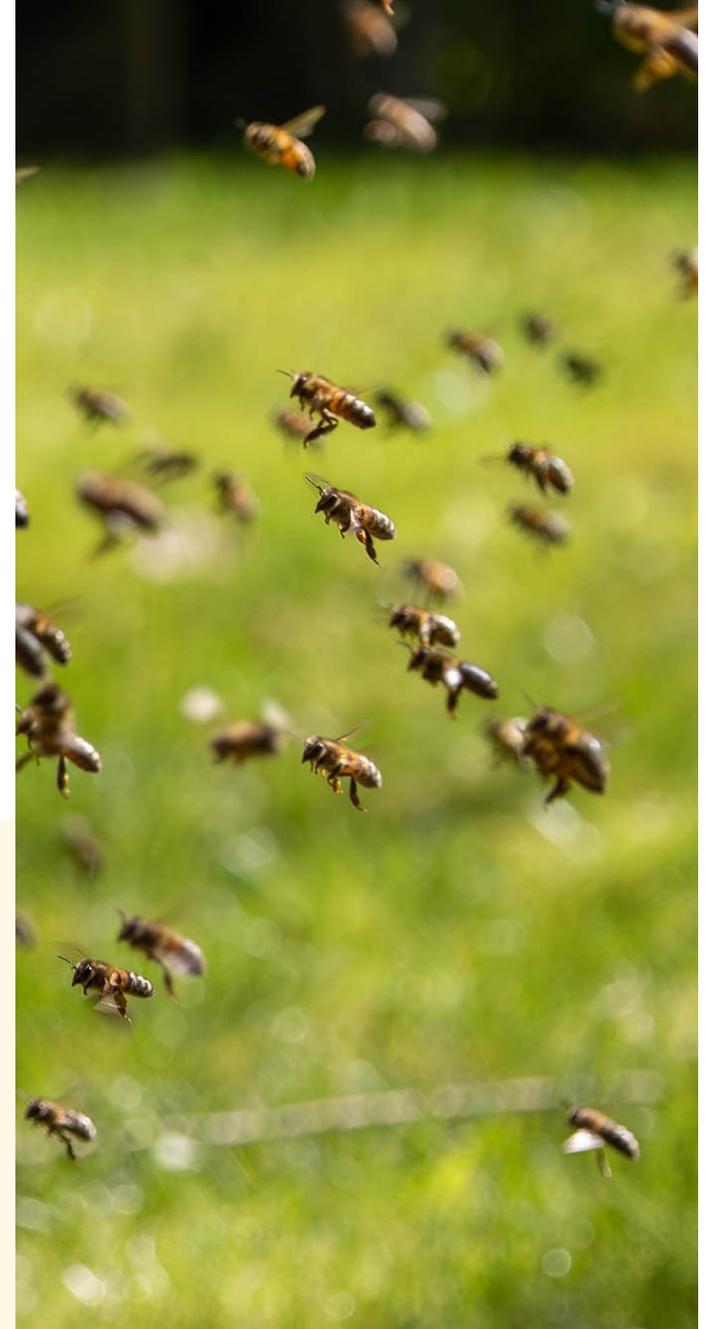
Most shoppers are aware of declining bee populations and express a desire to help promote bee-friendly causes.

- Shoppers recognize the importance of strong bee populations for our food system and want to support bees and farmers
- Many see honey as good for bees and make a connection between their honey purchasing (amount, price point) and bee welfare, with nearly half of shoppers expressing a willingness to pay more for honey products that champion bee-friendly causes
- As such, support for bees and local farmers is the top reason for potential increased purchasing of honey (though actual honey selection decisions equally consider sustainability attributes more closely offering personal benefits)
- However, a minority also see honey as bad for bees, and support for bees is also among the top reasons to purchase less honey.

Marketing honey around bee welfare is tricky as some see buying less honey as most bee-friendly. Perceptions about bee welfare may be among the most potent drivers of shopper behavior but due to confusion and disagreement can either enhance or degrade enthusiasm for honey.

Connecting strong bee populations to the health of the overall food system may present a more compelling argument as shoppers a need to address challenges in this area. Messaging should also strive for a more emotional connection rather than mere information sharing, highlighting and reinforcing any positive stories to tell about current conditions of production and about the mutually beneficial relationship among bees, bee-keepers, and natural honey.

And since shoppers scrutinize food packaging for cues of benefits to themselves, sustainability credentials with a direct relevance to shoppers' health (e.g., no harmful substances) are featured.



Honey Fast Facts: Total

#2

Honey remains a close second favorite sweetener with 26% of shoppers rating it as their favorite, just behind white sugar at 28%. 76% say it is something everyone would enjoy.



Believe using honey is very/somewhat good for honey bees.



Report using honey multiple times a month, with 27% being heavy users.



Two-thirds of all shoppers say they are aware of the declining honey bee population.

#1

Beverages, including tea and coffee, are the #1 use of honey at 62%, followed by use at breakfast at 51%.



Among the 17% of shoppers who recall hearing a positive story about sweeteners, 56% say it was a story about honey (+5 pts from 2022). Stevia, the next closest sweetener, has half that at 31%.

Honey Fast Facts: Goodness Seekers

#1

Honey remains Goodness Seekers' favorite sweetener. 88% say it is something everyone would enjoy.



Believe using honey is very/somewhat good for honey bees.



Of Goodness Seekers report using honey multiple times a month, with 47% being heavy users.



Two-thirds of Goodness Seekers (similar to all shoppers) say they are aware of the declining honey bee population.

#1

Beverages, including tea and coffee, are the #1 use of honey at 64%, followed by use at breakfast at 57%. Goodness Seekers over-index most over all shoppers in using honey for medicinal purposes and at snacks.



Among the 30% of shoppers who recall hearing a positive story about sweeteners, 56% say it was a story about honey (+5 pts from 2022). Stevia, the next closest sweetener, has half that at 32%.



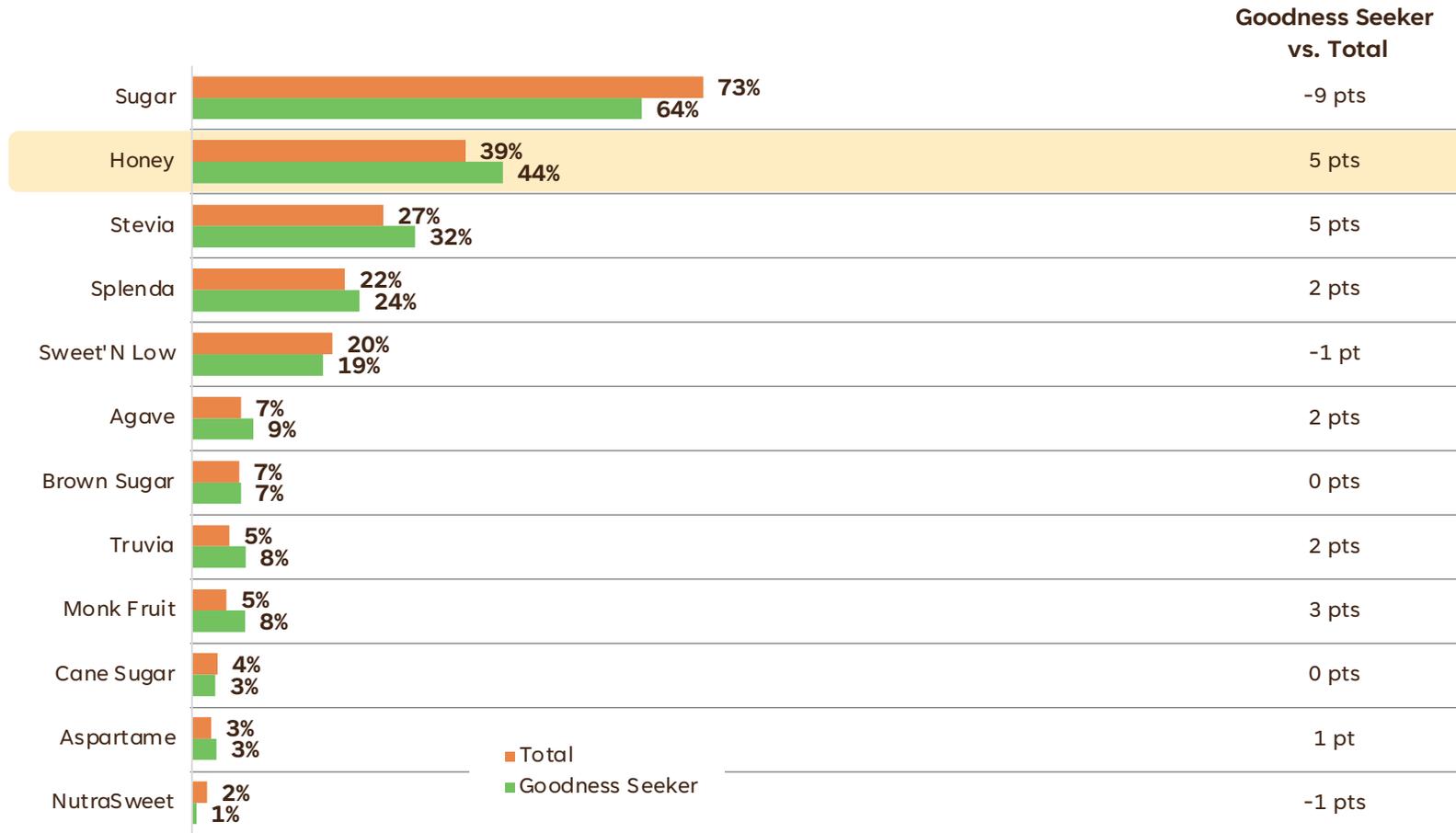
THE SWEETENER LANDSCAPE:
ATTITUDES, AWARENESS & USAGE

SWEETENER AWARENESS & ATTITUDES

Sugar remains the most top-of-mind sweetener, followed by honey

Sweetener Awareness

(When you think about what you use to sweeten your food and beverages, what sweeteners come to mind?) Showing top 12



Aside from these traditional sweeteners, shoppers also mention substitutes that span natural and artificial, other types of sugars, and sweeteners derived from specific plants, reflecting the multitude of approaches that exist for adding sweet taste to food and beverages.

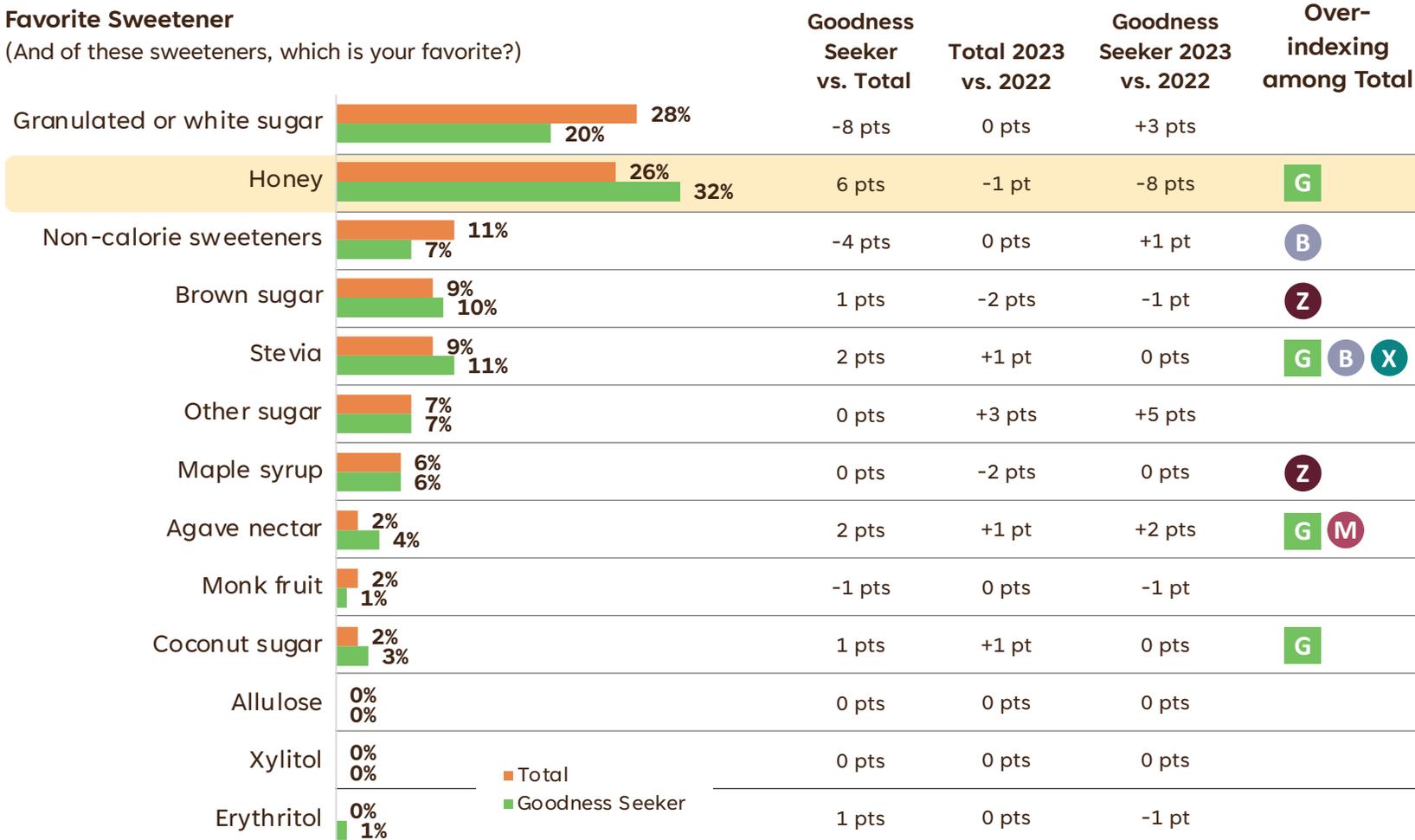
Goodness Seekers are less likely to think of sugar and more likely to think about natural alternatives, such as honey, stevia or monk fruit.

Honey continues to be a favorite sweetener



Favorite Sweetener

(And of these sweeteners, which is your favorite?)



As in 2022, when Americans are asked which sweetener is their favorite, honey is their choice (26%) nearly as frequently as granulated/white sugar (28%).

Honey is clearly the top favorite choice among Goodness Seekers. They also note stevia, agave, and coconut sugar as their favorites more often than others.

From a generational perspective, Boomers tend to favor sugar non-caloric sweeteners or stevia more than younger shoppers, while Gen Z are drawn to brown sugar and maple syrup in higher numbers, and Millennials to agave.

B Boomers
 X Gen X
 M Millennials
 Z Gen Z
 G Goodness Seekers
 Household with kids



A quarter of American shoppers say honey is their favorite sweetener – a consistent choice over the past five years.

Granulated/white sugar enjoys a similar level of popularity but has fluctuated over the same time period, with a dip in 2020.

Brown sugar and agave have also seen a consistent level of preference in this time period, albeit at a much lower level than honey or granulated sugar.

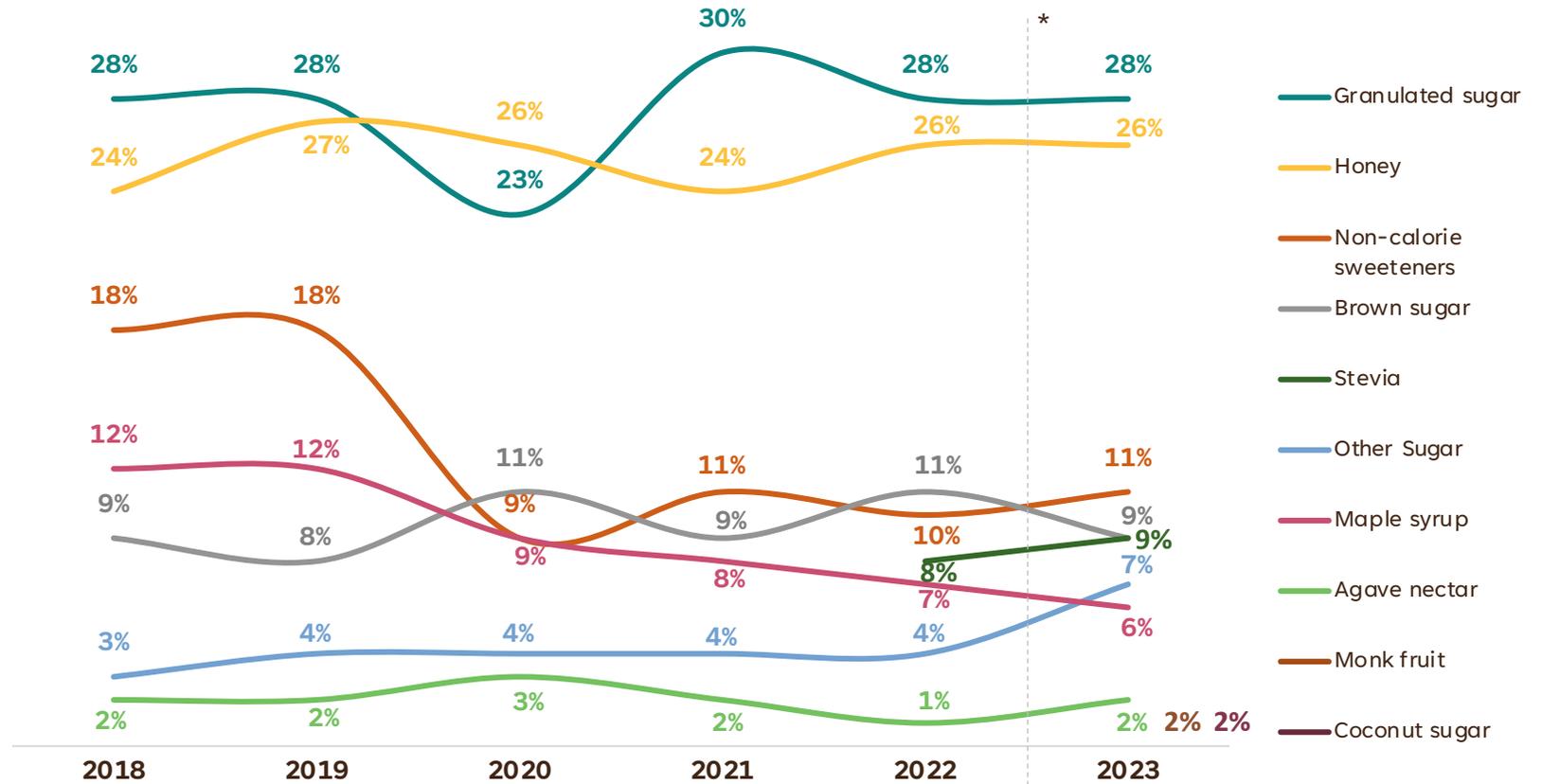
Preferences for stevia and other sugar (beyond granulated/white, brown or coconut) seems to be on the rise, while shoppers are now less inclined to favor non-calorie sweeteners, reflecting health concerns about these sugar substitutes. Maple syrup preference is also declining.

SWEETENER AWARENESS & ATTITUDES

Preference for honey has remained relatively stable over the past five years

Favorite Sweeteners

(And of these sweeteners, which is your favorite?)



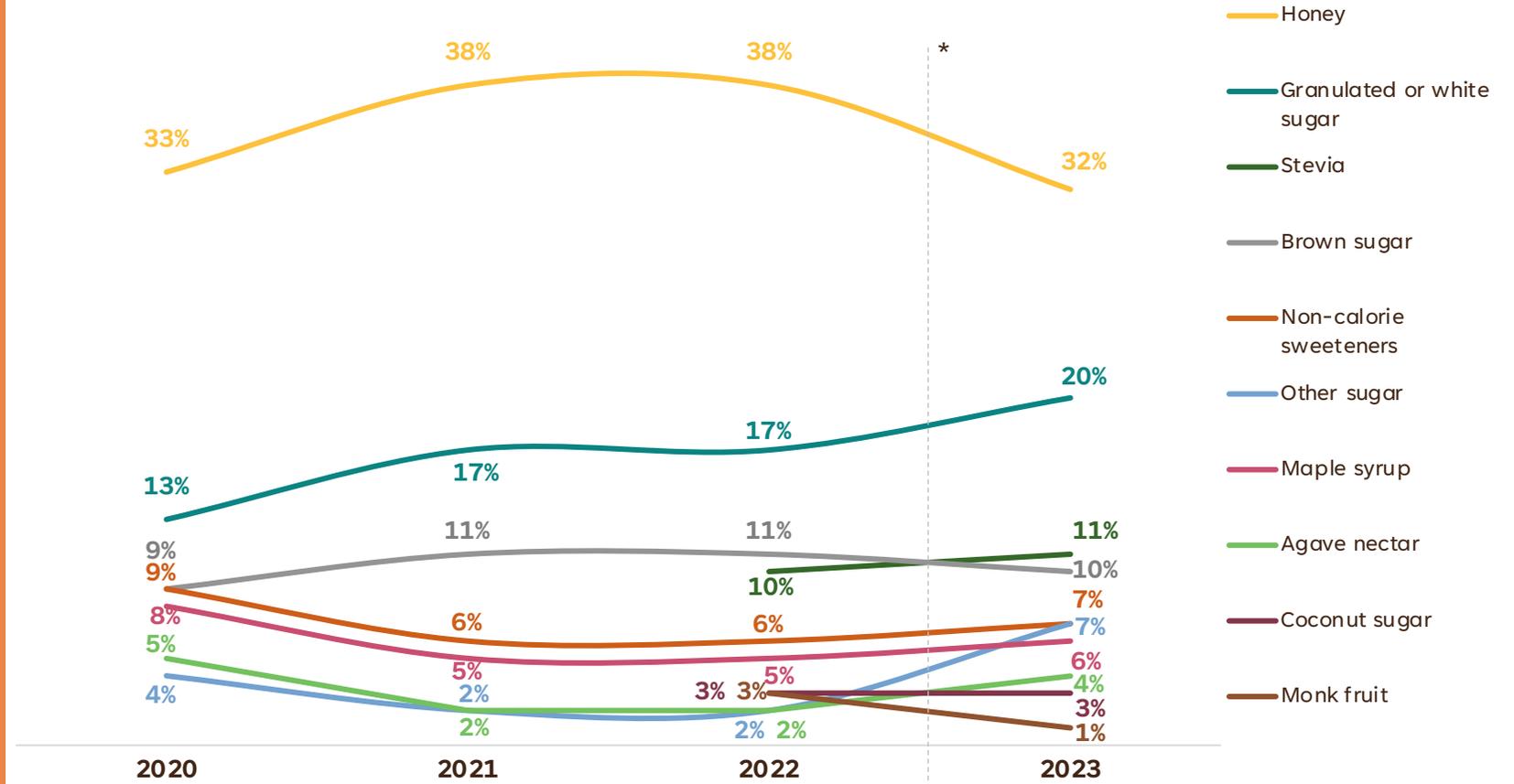
Nearly a third of Goodness Seekers say honey is their favorite sweeter vs one-fifth saying the same about granulated/white sugar.

However, popularity of granulated sugar, as well as other sugar, is rising steadily among these shoppers as views shift towards more acceptance of indulgence as part of a balanced diet.

SWEETENER AWARENESS & ATTITUDES – GOODNESS SEEKER

Among Goodness Seekers, honey remains the clear favorite

Favorite Sweeteners – Goodness Seekers
(And of these sweeteners, which is your favorite?)



Total (n=2,265), Goodness Seeker (n=379).

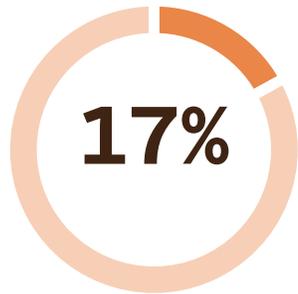
* Change in demographic weighting methodology between 2022 and 2023.

SWEETENER AWARENESS & ATTITUDES

Nearly one-fifth of shoppers, and nearly one-third of Goodness Seekers, recall a positive story about sweeteners, most often honey

Positive Story Recall

(Within the past year, can you recall reading any articles or hearing a POSITIVE story about sweeteners in any public media, such as newspapers, magazines, radio, TV or online?)



17%

TOTAL

-3 pts vs 2022



30%

GOODNESS SEEKER

-15 pts vs 2022

Among those who heard or read a positive story about sweeteners, more than half of shoppers, and nearly two-thirds of Goodness Seekers, say the story was about honey, far more than about any other type of sweetener. Other positive stories recalled covered stevia, brown sugar, maple syrup, coconut sugar, and non-calorie sweeteners, each noted more often by Goodness Seekers than others.

Positive Story Sweetener Types

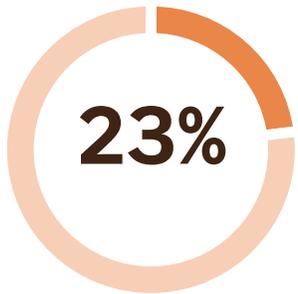
(Which specific sweeteners were featured in the articles or POSITIVE stories you recalled?) Among those who recalled a positive story

	TOTAL	Goodness Seeker	Goodness Seeker vs. Total
Honey	56%	64%	8 pts
Stevia	31%	32%	1 pt
Brown sugar	25%	38%	13 pts
Maple syrup	22%	24%	2 pts
Coconut sugar	20%	33%	13 pts
Non-calorie sweeteners	18%	27%	9 pts
Agave nectar	15%	7%	-8 pts
Monk fruit	13%	12%	-1 pt
Granulated or white sugar	9%	9%	0 pts
Allulose	9%	12%	3 pts
Other sugar	9%	12%	3 pts
Xylitol	5%	4%	-1 pt
Erythritol	3%	5%	2 pts
I don't recall / sweeteners in general	6%	1%	-5 pts

Recall of negative stories is on the rise among shoppers overall and among Goodness Seekers

Negative Story Recall

(Within the past year, can you recall reading any articles or hearing a NEGATIVE story about sweeteners in any public media, such as newspapers, magazines, radio, TV or online?)



TOTAL

+10 pts vs 2022



GOODNESS SEEKER

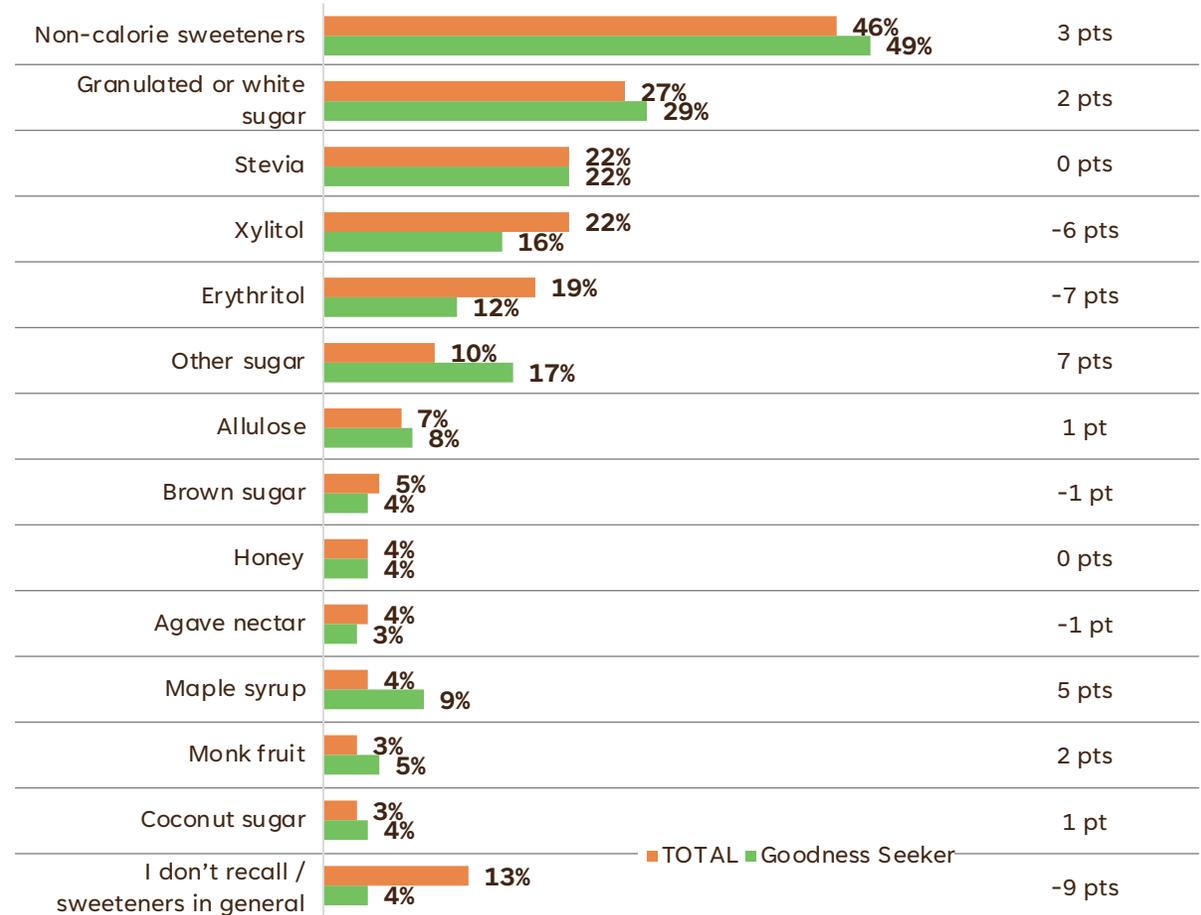
+7 pts vs 2022

Shoppers overall are more likely to remember negative (vs positive) news stories about sweeteners, though Goodness Seekers recall positive stories more often. Negative news that shoppers (and Goodness Seekers) recall most often focus on non-calorie sweeteners, followed by granulated/white sugar, stevia, xylitol, and erythritol.

Negative Story Sweetener Types*

(Which specific sweeteners were featured in the articles or NEGATIVE stories you recalled?) Among those who recalled a negative story

Goodness Seeker vs. Total

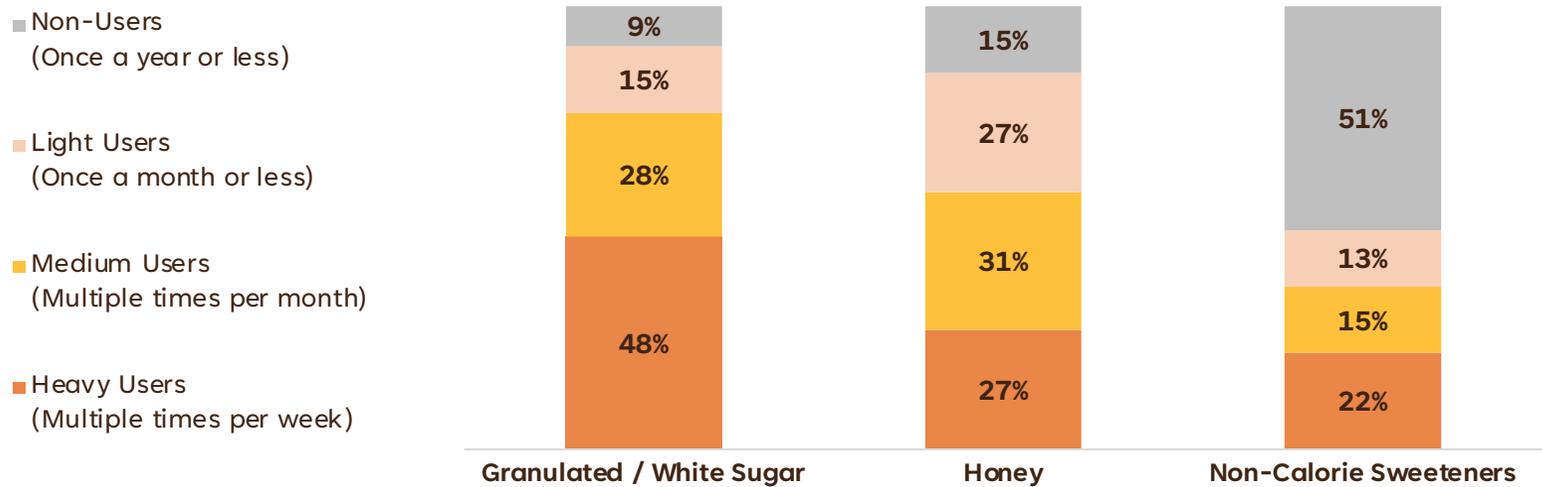


Among those who use honey, only about one-third use it multiple times per week

Granulated/white sugar is a highly consumed sweetener with nearly half of all shoppers comprising “Heavy” users, using it multiple times per week. Honey consumption frequency is more diverse with a fairly even distribution among Heavy, Medium and Light Users, signaling an opportunity to move consumer frequency up from Light to Medium and Medium to Heavy use. Sugar may accrue its heavy usage from a broad array of occasions, but more likely this results from being an essential part of a frequent application (such as morning coffee). Honey usage may most efficiently be increased through incorporation on similarly frequent types of uses.

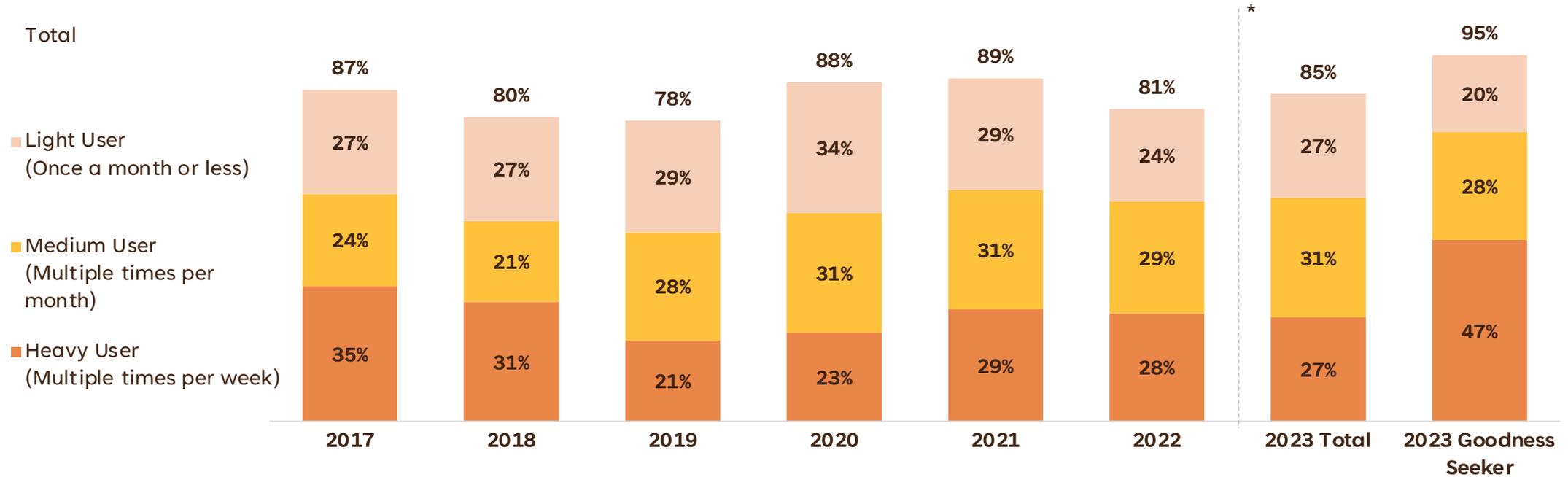
Sweetener Usage Levels (Heavy/Medium/Light) Based on Self-Reported Frequency

(How often do you usually eat the following types of sweeteners?)



Usage of honey has been largely consistent over the past six years

Honey Usage Levels (Heavy/Medium/Light) Based on Self-Reported Frequency
 (How often do you usually eat the following types of sweeteners?)



Honey purchasers have been nearly evenly split into Heavy, Medium and Light users, with some increased in usage during 2020 and 2021, likely as a result of increased at-home consumption during the height of the COVID-19 pandemic. Goodness Seekers are not only more likely to be users of Honey, but also to be Heavy users, turning to Honey for a variety of needs throughout the week, including routine uses such as breakfast but also more often medicinal benefits.

SWEETENER USAGE & APPLICATION

Honey is more versatile across usage occasions than other sweeteners

Association of Sweeteners with Usage Occasions

(How is each sweetener typically used in your household?) Sweeteners listed in order of “favorite”

	White Sugar	HONEY	Non-Calorie	Brown Sugar	Stevia	Other Sugar	Maple Syrup	Agave Nectar	Monk Fruit	Coconut Sugar
At breakfast	41%	51%	36%	24%	23%	35%	89%	25%	40%	23%
At lunch	11%	16%	14%	4%	10%	10%	6%	6%	9%	7%
At dinner	14%	17%	12%	14%	7%	14%	10%	6%	12%	6%
In cooking (sauces, marinades, etc.)	43%	48%	19%	54%	17%	40%	20%	28%	26%	39%
In baked goods	73%	47%	29%	68%	22%	46%	27%	27%	47%	50%
With snacks	19%	31%	16%	12%	9%	14%	9%	13%	23%	13%
In beverages like tea, coffee, or smoothies	58%	62%	79%	17%	70%	51%	13%	48%	54%	35%
In alcoholic beverages or mixed drinks	6%	7%	2%	2%	3%	9%	3%	25%	13%	6%
For medicinal purposes	0%	28%	3%	2%	3%	6%	1%	8%	5%	5%
For beauty care	2%	9%	3%	3%	1%	3%	1%	2%	2%	6%
Other	2%	2%	4%	4%	7%	3%	2%	5%	2%	7%
AVG. NUMBER OF USES	2.7	3.2	2.2	2.0	1.7	2.3	1.8	1.9	2.3	2.0

Top Use (row %) by Occasion

#2-3 Uses by Occasion

Honey is the most versatile of all sweeteners. Across ten types of usage occasions evaluated, honey is the sweetener most likely to be linked by its users with five of these, and a top-three selection for eight out of ten occasions. While widely used and a typical favorite, white sugar’s uses actually tend to be somewhat more limited.

Understanding, optimizing for and communicating around specific uses can drive incremental volume among existing users.

Honey is most likely to be associated with non-alcoholic beverages, where it competes for relevance with non-caloric sweeteners and stevia. Honey’s connection with breakfast is dwarfed by that of maple syrup but otherwise fares strongly against monk fruit and sugar.

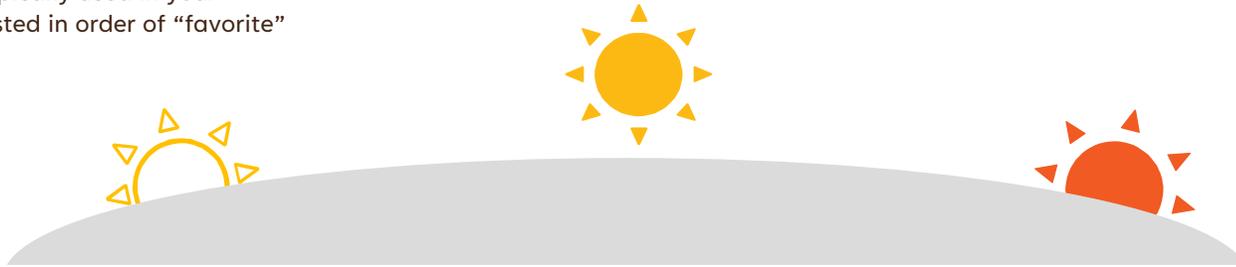


Consumer A&U 2023. White Sugar (n=385), Honey (n=2,027), Non-calorie (n=240), Brown Sugar (n=368), Stevia (n=208), Other Sugar (n=226), Maple Syrup (n=321), Agave Nectar (n=164), Monk Fruit (n=119), Coconut Sugar (n=127).

Honey users have breakfast in mind

Association of Sweeteners with Meals

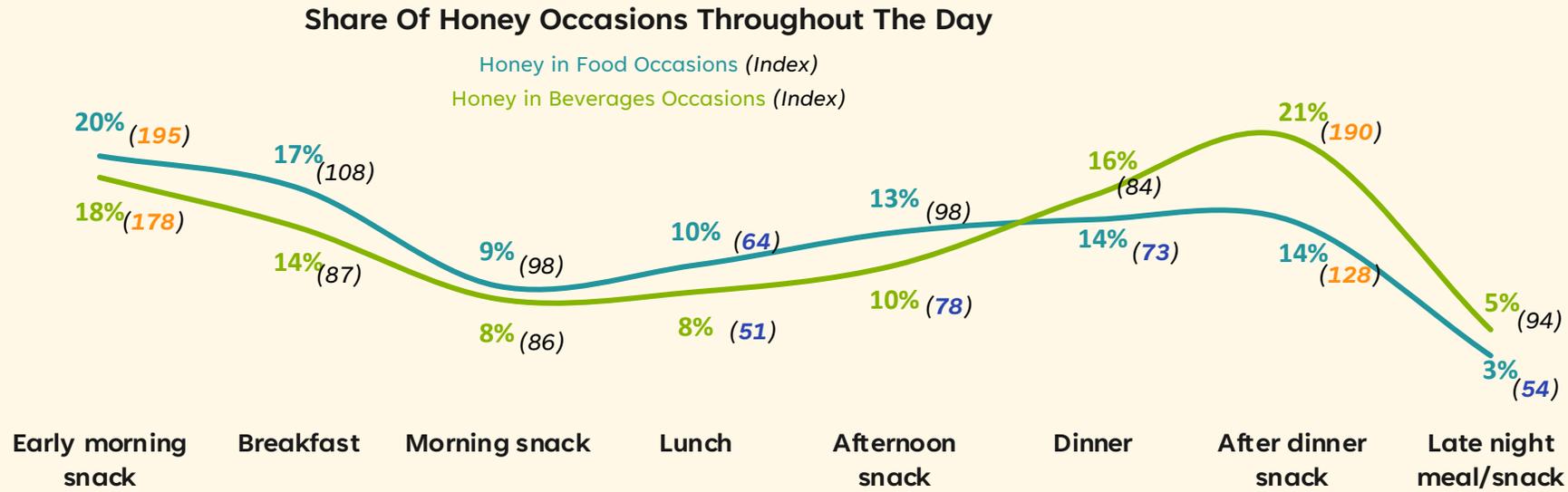
(How is each sweetener typically used in your household?) Sweeteners listed in order of “favorite”



	BREAKFAST	LUNCH	DINNER
	2023	2023	2023
White sugar	41%	11%	14%
Honey	51%	16%	17%
Non-calorie	36%	14%	12%
Brown sugar	24%	4%	14%
Stevia	23%	10%	7%
Other sugar	35%	10%	14%
Maple syrup	89%	6%	10%
Agave nectar	25%	6%	6%
Monk fruit	40%	9%	12%
Coconut sugar	23%	7%	6%

More than half of honey users say they typically use honey at breakfast, its single strongest association with a specific use, and far more than its connection with lunch or dinner. As noted elsewhere, honey is almost as likely to be used at dinner as at breakfast, so this “typical” connection with breakfast time is less about where honey derives its volume of servings and more about what shoppers have in mind when purchasing. Honey shares this breakfast-time association with other caloric sweeteners. Quite possibly, it is especially helpful for a sweetener to be considered breakfast-worthy (e.g., compatible with nutrition-focused eating) to merit inclusion in a household’s pantry.

In reality, honey is used throughout the day, though especially outside of meals at the very beginning or end of the day



Honey At Snacks

58%
of Honey in Food occasions take place during SNACKS (120 Index)

62%
of Honey in Beverages occasions take place during SNACKS (127 Index)

Despite what shoppers may report about their “typical” uses for honey, when their behaviors are measured in the context of all their eating and drinking, in practice they tend to use honey across a broad range of consumption occasions throughout the day. Honey may be associated with breakfast but is actually more likely to be used before breakfast time, per se. While not directly associated with honey, dinner includes honey just as commonly as breakfast, perhaps as part of cooking or baking. After-dinner snacks mark honey’s peak moment of usage within beverages. On the whole, honey (whether used in food or beverages) is somewhat more likely to be used during meals than during snacks.

Are there distinctive patterns to the ways in which shoppers say they typically use honey? Which occasions and applications tend to go together, constituting “approaches” to honey?

Analysis reveals 6 sets of typical uses which tend to be cited in tandem: Dinner/lunch (which may be interpreted as “Condiment” usage); Cooking/baking (“Ingredient”); Wellness/beauty (“Elixir”); Breakfast/snacks (“Topping”); Beverages (“Stir-In”); and Alcoholic beverages (“Syrup”).

Among these approaches to honey, usage as a Topping is most connected with additional distinct uses (especially lunch and baking), and is the strongest driver of usage frequency overall, suggesting this is a “lynchpin” of usage; **those who come to honey via both breakfast and snacking will tend to use it in other ways as well.** Goodness Seekers are especially likely to approach honey through these uses, but even more so as an Elixir (through Wellness/beauty), suggesting that **perceived nutritional properties** support their engagement.

SWEETENER USAGE & APPLICATION

Honey is used more by those who rely on it as a topping or as an elixir

How Different Shoppers Use Honey*

(“Typical” uses which tend to be cited in tandem; in order of correlation of factor score with usage frequency)

Approach	Specific Uses	Impact on Usage Frequency	Link With Goodness Seeker
Topping	With snacks At breakfast <i>+At lunch; +In baked goods; +At dinner</i>	↑↑↑ Highest (.26)	G
Elixir	Used for beauty care Used for medicinal purposes <i>+In alcoholic beverages</i>	↑↑ High (.20)	G
Condiment	At dinner At lunch <i>+With snacks</i>	↑ Moderate (.18)	
Stir-In	In beverages like tea, coffee, smoothies <i>+In alcoholic beverages or mixed drinks</i>	↑ Moderate (.17)	
Syrup	In alcoholic beverages or mixed drinks	Low (.11)	G
Ingredient	In cooking (sauces, marinades) In baked goods <i>+At dinner</i>	Lowest (.09)	

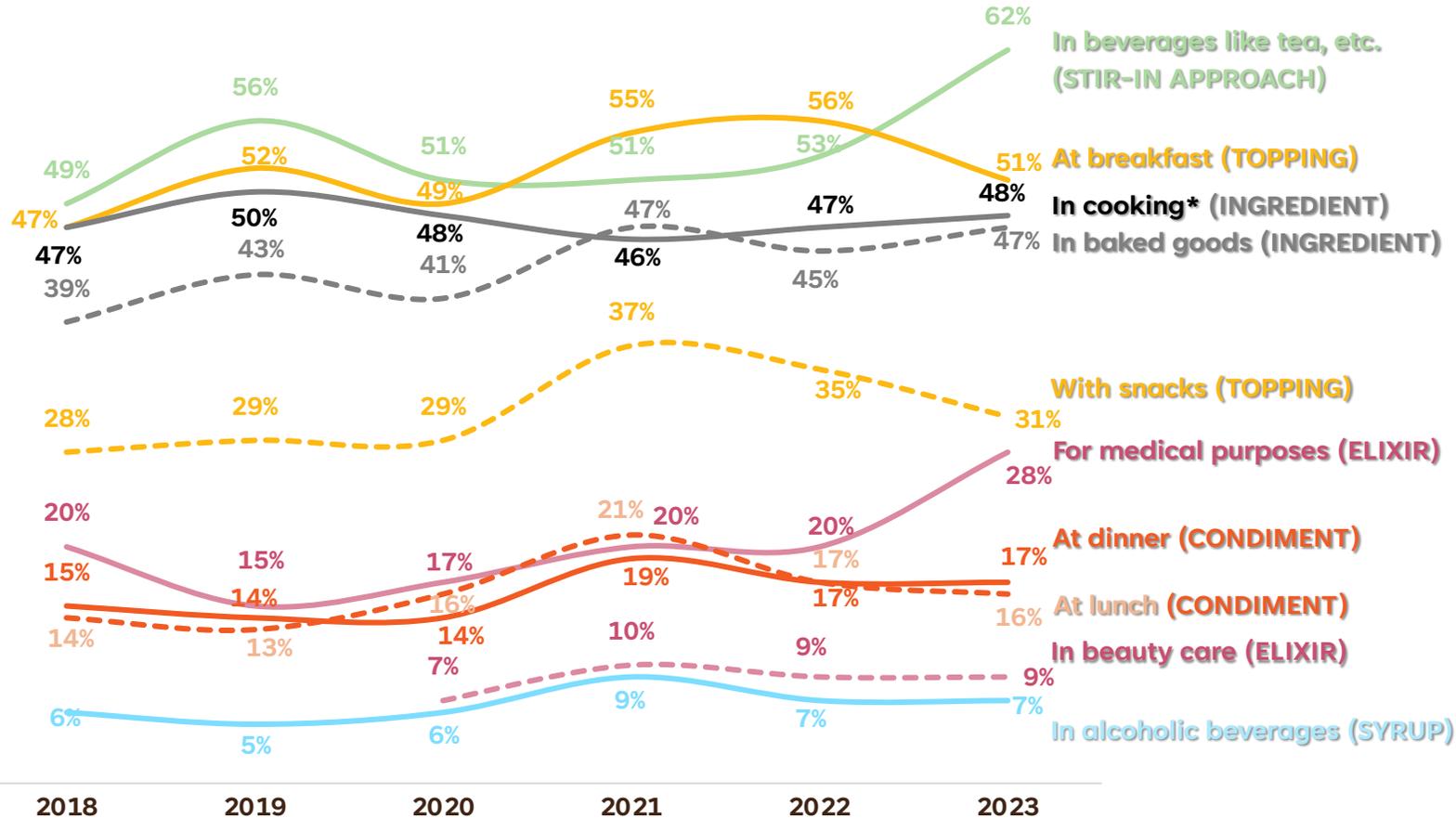
Total (n=2,265), Goodness Seeker (n=379). * Based on principal-axis dimensional analysis, Varimax rotation. Alcoholic beverage, while not a distinct factor, shows moderate association with 4 of the 5 identified factors, suggesting its independence.

SWEETENER USAGE & APPLICATION

Usage of honey has become more relevant in beverages and for medical purposes

Usage of Honey at Occasions over Time

(How is each sweetener typically used in your household?)



Historically, the portions of shoppers reporting “breakfast” or “snacks” as their typical uses of honey have risen and fallen in tandem, suggesting that the current connection between these two uses has been longstanding.

This year, two uses have been cited at an unprecedentedly high level: honey in beverages, and honey for medical purposes. These stronger associations with honey may reflect new uses for honey in the home, or may now be more top of mind due to increasing interest in home remedies to support immunity or sleep.



Shoppers have a broad range of requirements for their sweeteners

Top 20 Most Important Sweetener Attributes

(How important is each to you when deciding what specific sweetener to choose?)

Showing Extremely + Very Important

		Goodness Seeker	Goodness Seeker vs. Total	
Convenient/easy to use	74%	79%	5 pts	
Flavorful	73%	79%	6 pts	
A good value	71%	80%	9 pts	
No aftertaste	66%	66%	0 pts	
Something everyone would enjoy	62%	75%	13 pts	G
Familiar	61%	66%	5 pts	
Fits with your lifestyle	61%	79%	18 pts	G
Healthy	59%	78%	19 pts	G
Something you had on hand	58%	67%	9 pts	
No strong flavor, just sweet	58%	60%	2 pts	
Contains no added ingredients	57%	72%	15 pts	G
Natural	56%	82%	26 pts	G
Versatile	56%	72%	16 pts	G
Good for my digestive health	56%	71%	15 pts	G
Good at breakfast	54%	65%	11 pts	G
Good for my immune system	50%	73%	23 pts	G
Has a "clean" ingredient label	48%	71%	23 pts	G
Low in calories	47%	59%	12 pts	G
Comforting	47%	63%	16 pts	G
Gives you energy	45%	68%	23 pts	G M

Among these requirements for sweeteners in general, convenience, flavor, and value rise to the top, each considered by nearly three-quarter of shoppers. Shoppers also consider aftertaste, breadth of appeal, familiarity, lifestyle fit, and various health benefits.

When asked which of their key attributes are the top two most important ones, healthy, natural, and low in calories gain in importance, while convenience is seen as less crucial.

Goodness Seekers ascribe a higher level of importance to most attributes, with natural, value, convenience, flavorful and lifestyle fit topping their list.

In line with its versatile nature, honey is strongly associated with a number of positive qualities that speak to its purity, health, taste, convenience, sustainability and other credentials.

Goodness Seekers feel even more strongly about honey across all of these attributes, with especially large differences over Total shoppers when it comes to fit with lifestyle, local/organic/sustainable provenance, role at breakfast, and universal appeal.

SWEETENER USAGE & APPLICATION

Shoppers strongly associate honey with being natural, flavorful, and familiar

Top 20 Honey Attributes

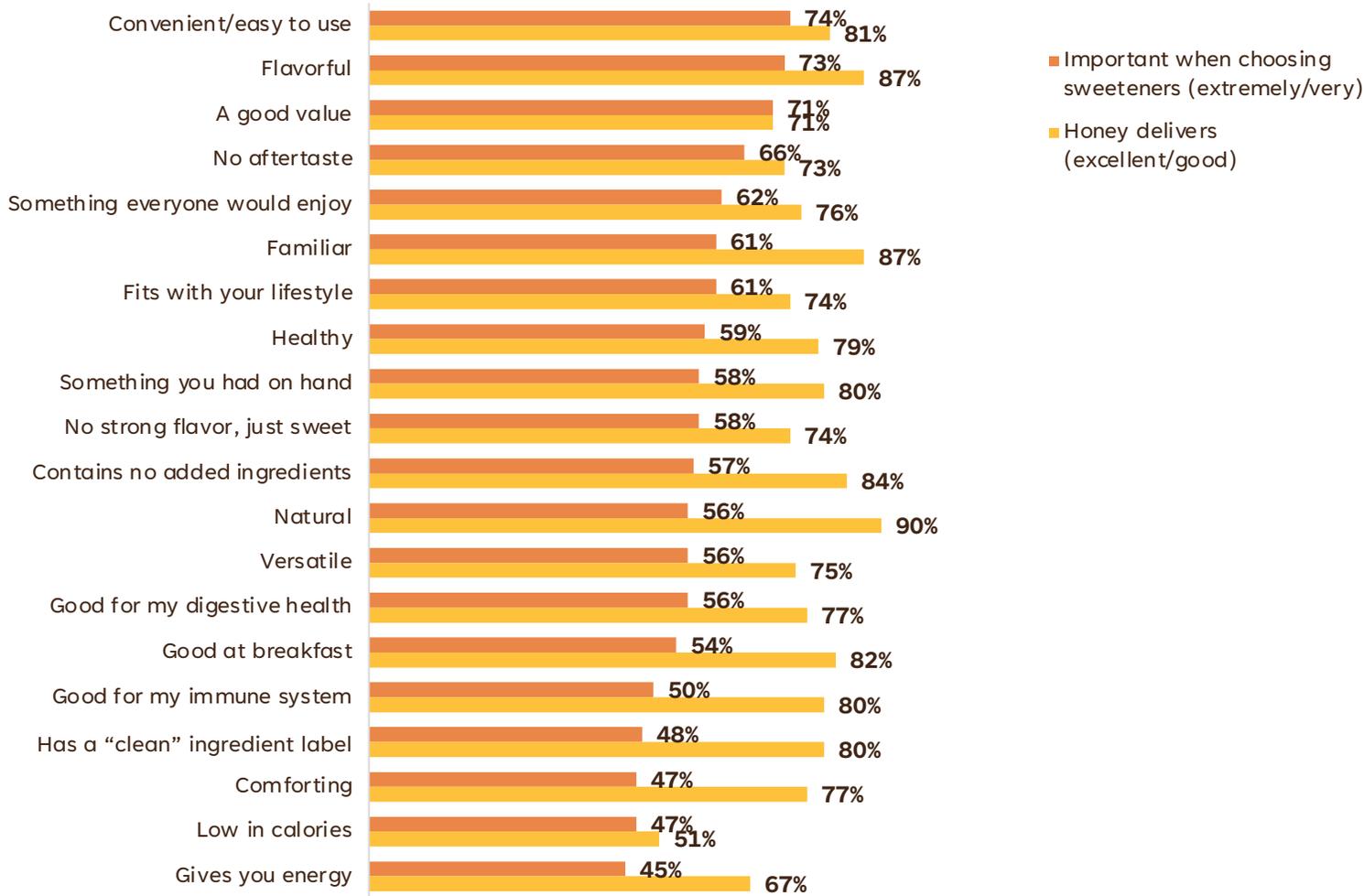
(Please rate how well honey delivers on the following attributes.)

		Goodness Seeker	Goodness Seeker vs. Total
Natural	90%	94%	4 pts
Flavorful	87%	94%	7 pts
Familiar	87%	95%	8 pts
Contains no added ingredients	84%	91%	7 pts
Good at breakfast	82%	94%	12 pts
US sourced/produced	82%	90%	8 pts
Convenient/easy to use	81%	90%	9 pts
Something you had on hand	80%	88%	8 pts
Has a "clean" ingredient label	80%	89%	9 pts
Good for my immune system	80%	90%	10 pts
Healthy	79%	86%	7 pts
Locally sourced/produced	79%	92%	13 pts
Comforting	77%	86%	9 pts
Sustainably produced	77%	87%	10 pts
Good for my digestive health	77%	86%	9 pts
Something everyone would enjoy	76%	88%	12 pts
Unprocessed	76%	81%	5 pts
Organic	75%	86%	11 pts
Versatile	75%	84%	9 pts
Good for the environment	75%	84%	9 pts

Honey delivers strongly across most sweetener purchase drivers

Honey Performance against Top 20 Sweetener Purchase Drivers

(How important is each to you when deciding what specific sweetener to choose?
Rate how well honey delivers on the following attributes.)



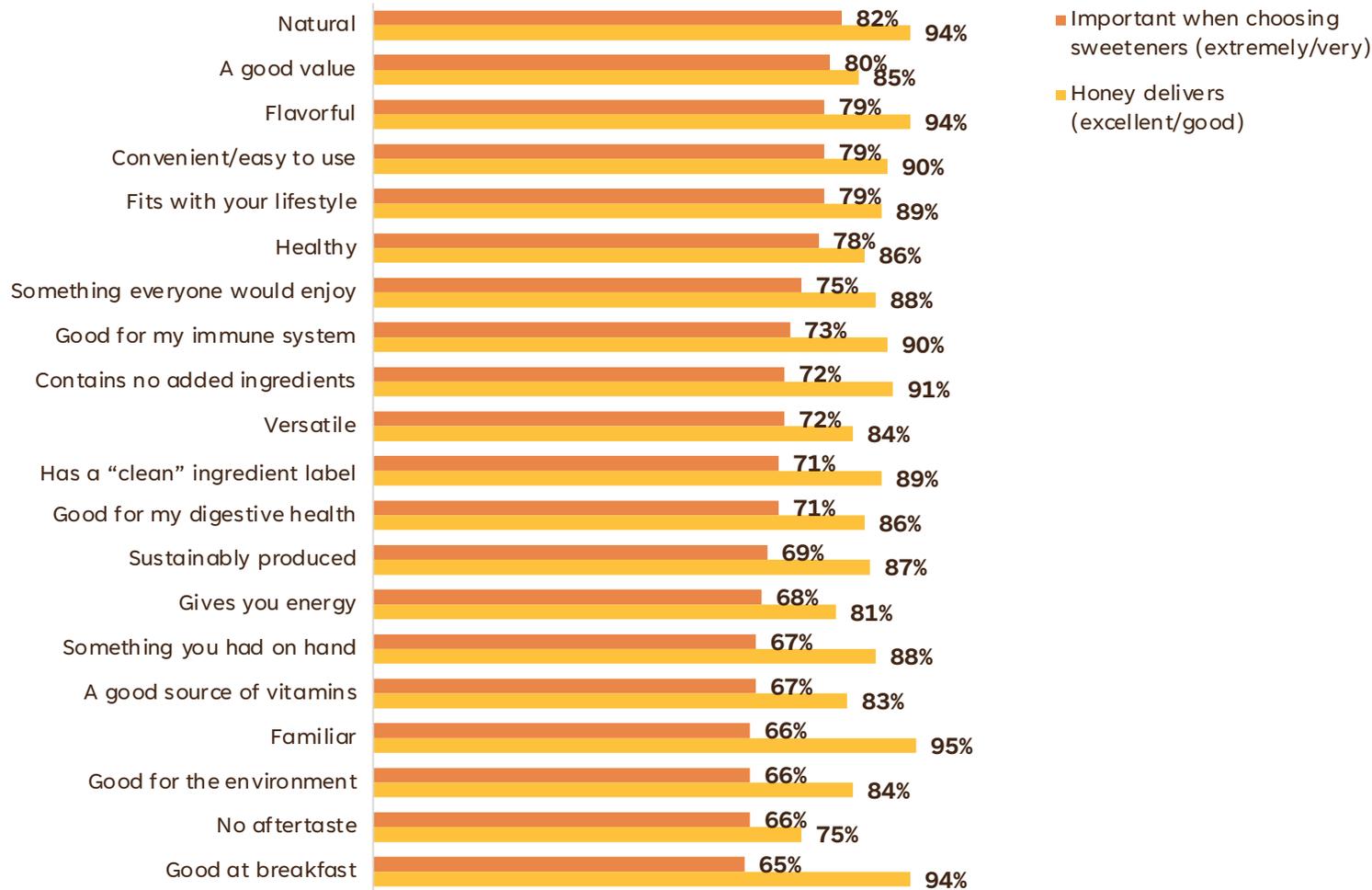
Among those attributes most important to shoppers when they choose sweeteners, honey is rated strongly for its flavor, convenience of use, value, absence of an unpleasant aftertaste, universal appeal, familiarity, and other benefits.



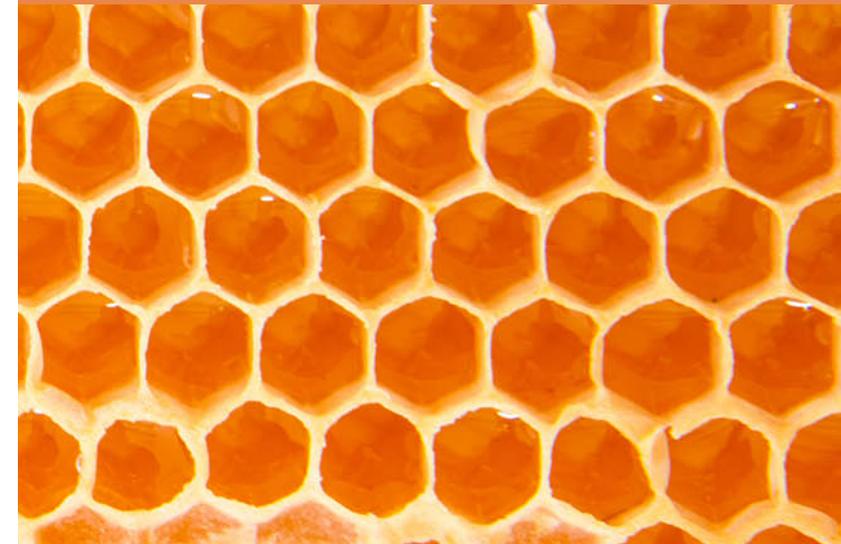
Goodness Seekers also seek honey as performing well on their top criteria

Honey Performance against Top 20 Sweetener Purchase Drivers – Goodness Seeker

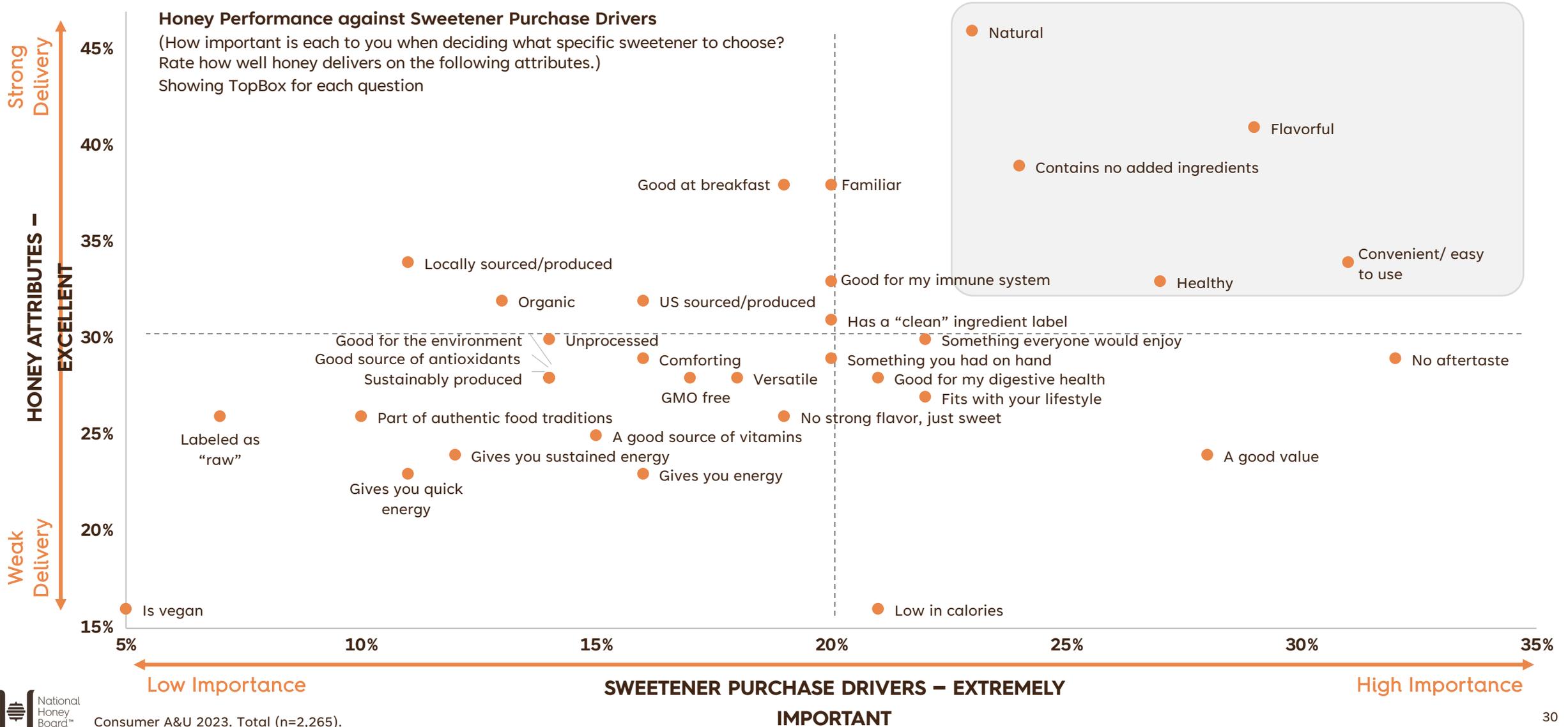
(How important is each to you when deciding what specific sweetener to choose?
Rate how well honey delivers on the following attributes.)



Goodness Seekers assign more value to each attribute in terms of importance than the general population. Specifically, natural is far more important to this group than to shoppers overall; however, both total respondents and Goodness Seekers feel that honey delivers on this promise.



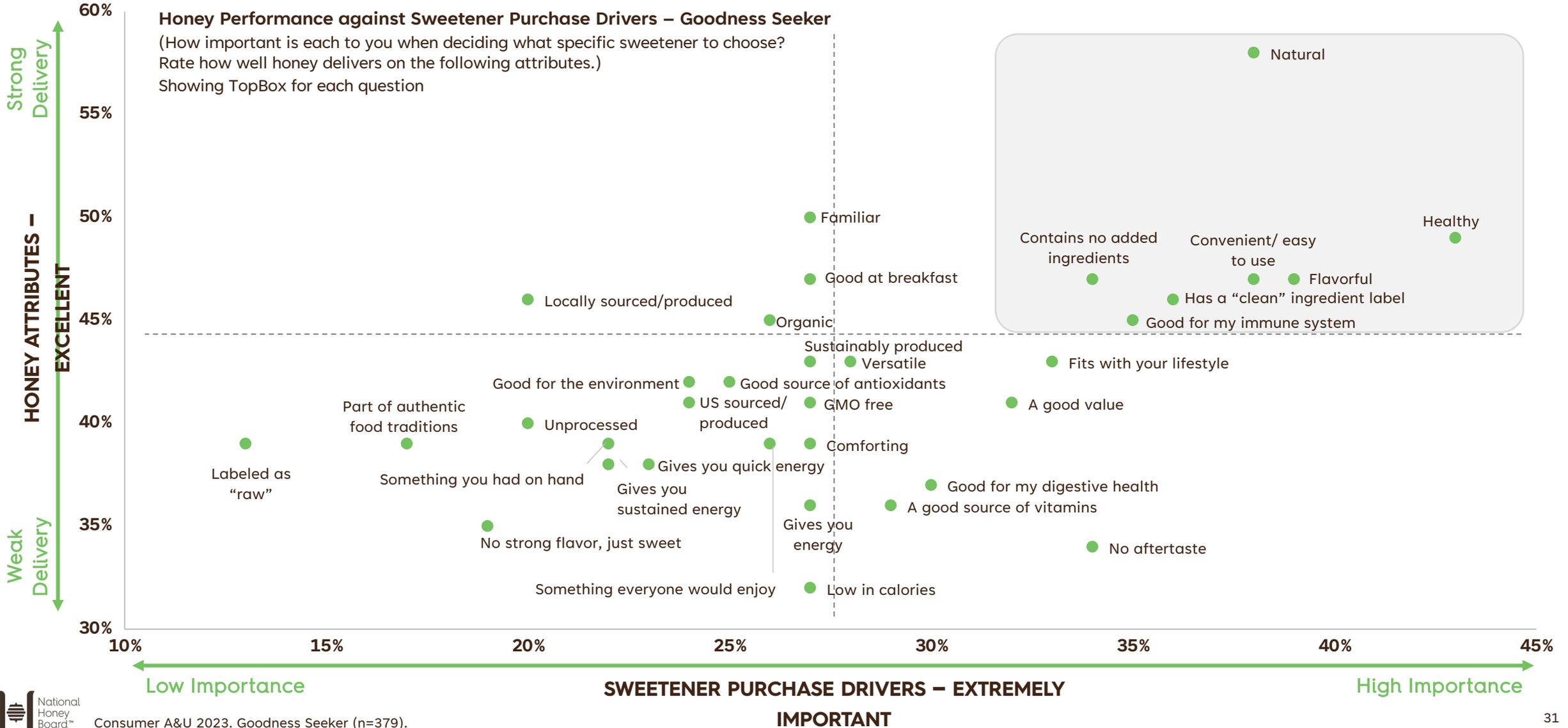
Among key sweetener attributes, honey delivers best on being natural, flavorful, pure, healthy, and convenient



For Goodness Seekers, honey delivers on their key desires for purity, health, convenience, and flavor

Honey Performance against Sweetener Purchase Drivers – Goodness Seeker

(How important is each to you when deciding what specific sweetener to choose?
Rate how well honey delivers on the following attributes.)
Showing TopBox for each question



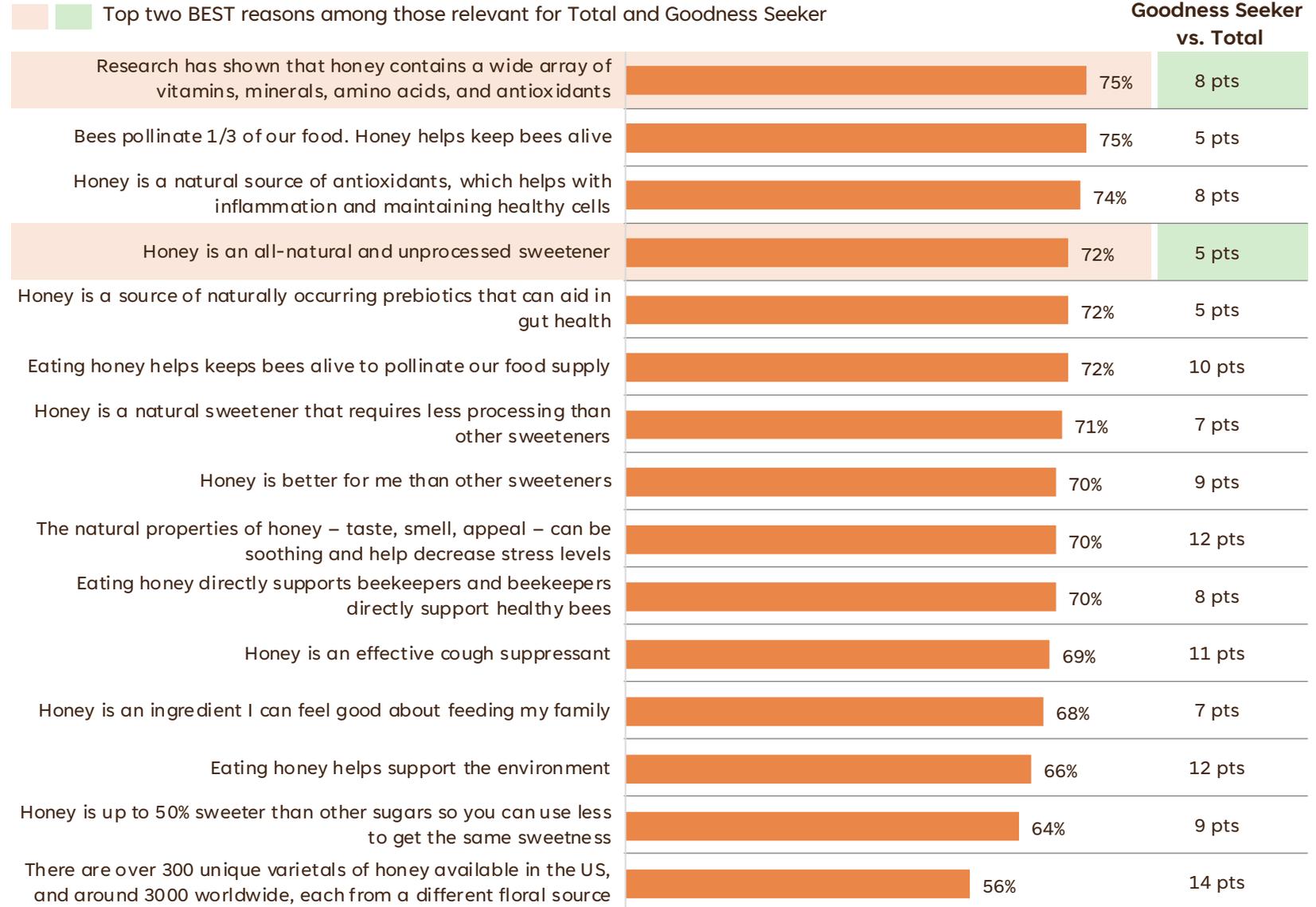
Health benefits, sustainability, and purity are the best motivators

Shoppers point to three areas of benefits that they consider relevant as motivators to eat more honey: health benefits such as vitamins, minerals, amino acids, antioxidants or prebiotics, sustainability of the food system by supporting bees who pollinate our food supply, and purity / minimal processing.

Aside from these priorities, Goodness Seekers also see honey’s therapeutic properties as highly relevant.

Motivation to Eat More Honey

(Assuming all of the statements listed below are true about honey, how relevant to you are each of these as a reason to eat honey more often?) Showing Great / Very good reason



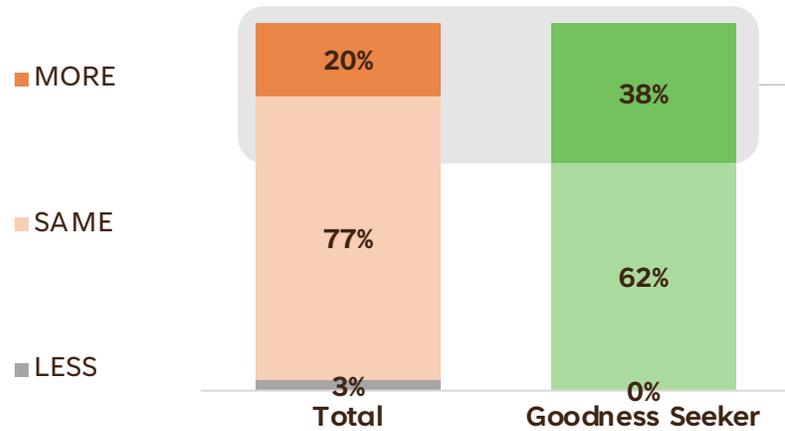
Total (n=2,265), Goodness Seeker (n=379).

SWEETENER USAGE & APPLICATION

Most shoppers plan to keep their honey consumption stable in the next year, but a minority hope to eat more

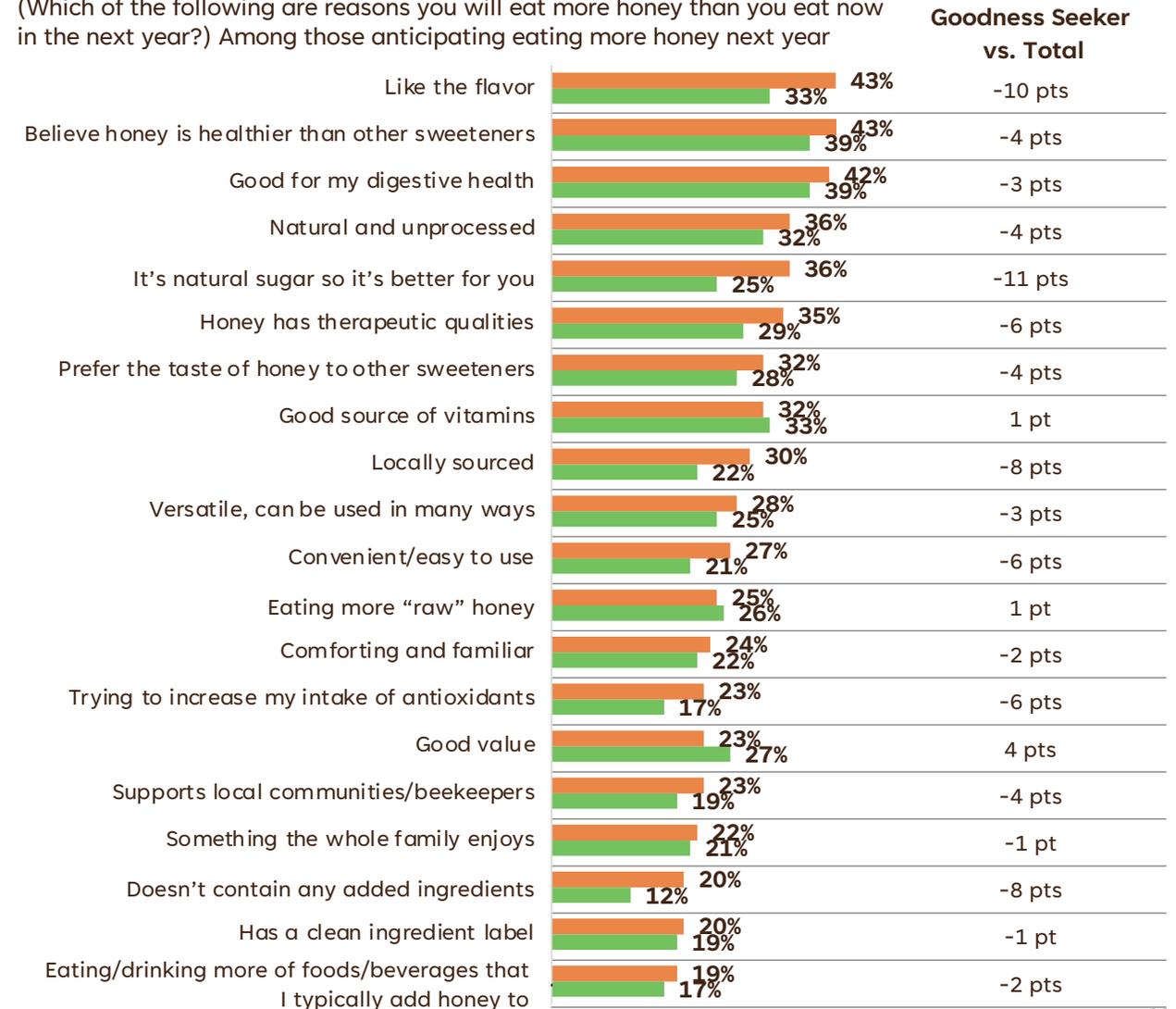
Anticipated Changes in Honey Consumption in the Next Year

(How, if at all, do you expect your honey consumption to change in the next year?)



Top 20 Reasons for Increased Honey Consumption in the Next Year

(Which of the following are reasons you will eat more honey than you eat now in the next year?) Among those anticipating eating more honey next year



The majority of shoppers, including Goodness Seekers, expect their honey consumption to remain stable over next year, though one-fifth (and over one-third of Goodness Seekers) aspire to eat *more* honey. Among these, flavor, health benefits, and honey's natural / less processed credentials stand out as reasons. Consistent with consumer sentiment in the 2023 inflationary environment, good value is the only reasons that increased in importance from 2022.





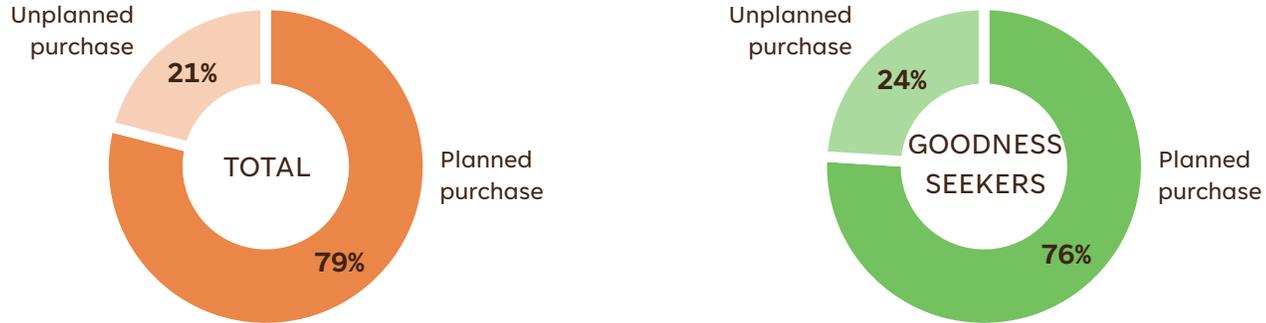
THE SWEETENER LANDSCAPE:
PATH TO PURCHASE

HONEY PURCHASING

Most honey purchases are planned, typically restocking

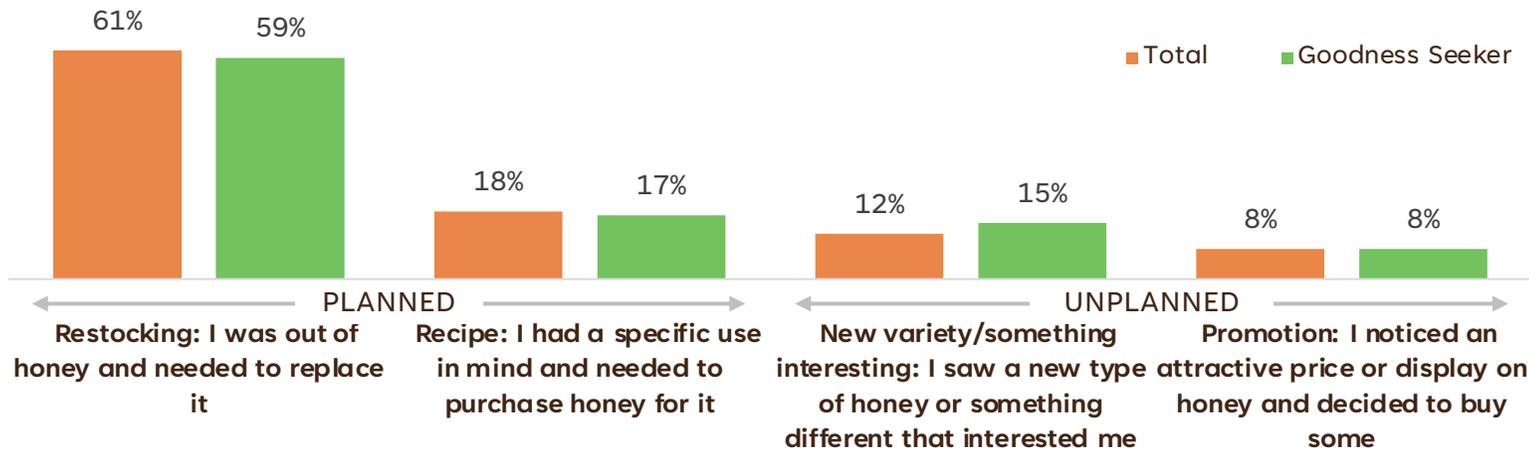
Planned vs. Unplanned Honey Purchases

(Thinking about the last time you bought honey, what was the reason you decided to purchase it that day?)



Specific Reasons for Honey Purchases

(Thinking about the last time you bought honey, what was the reason you decided to purchase it that day?)



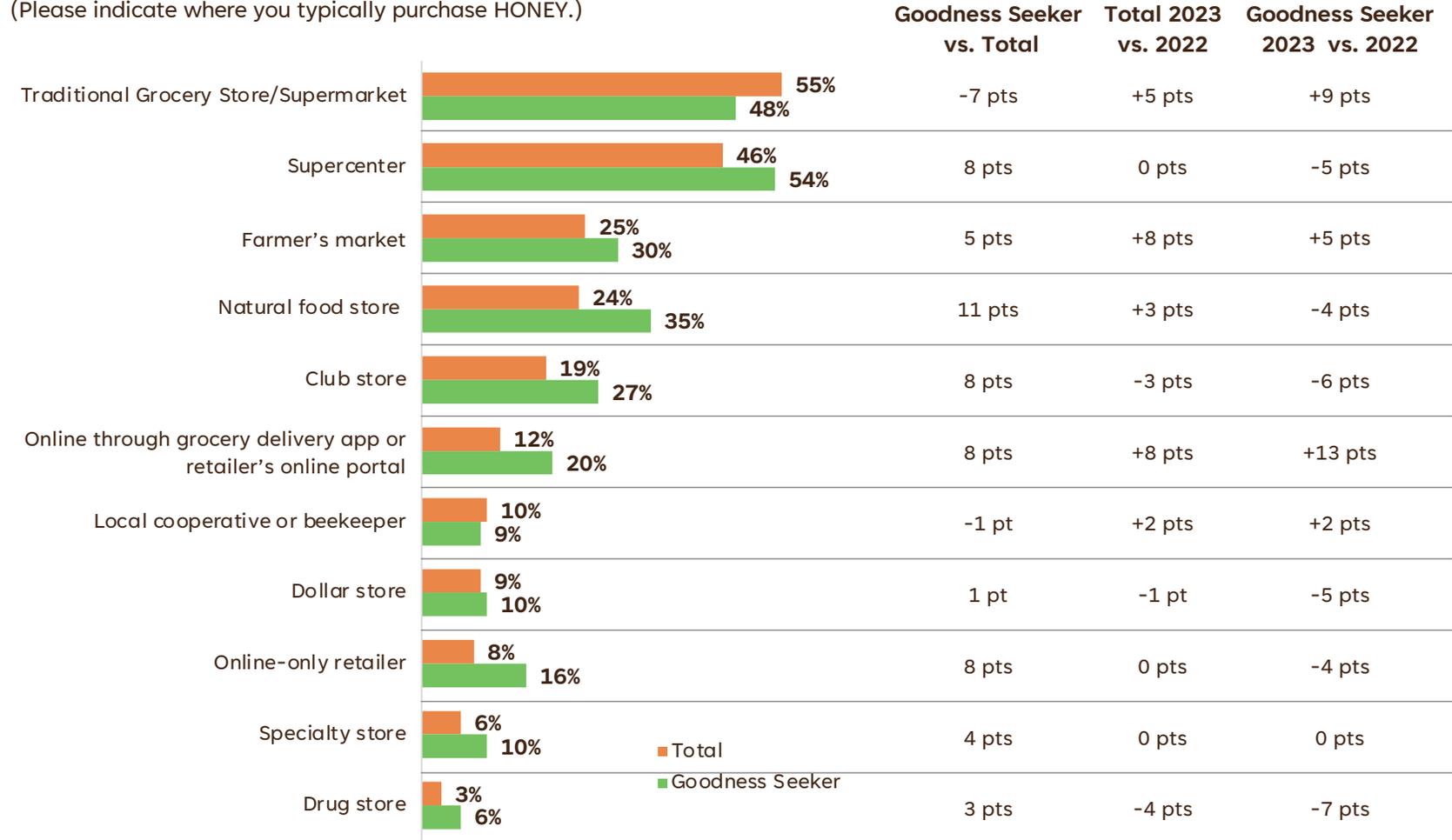
Honey is typically an item shoppers (and Goodness Seekers) keep on hand for its wide range of uses. As such, it is most often purchased simply to replace honey when it runs out at home. Spontaneous purchases are therefore less common, though these can be motivated by opportunities for exploration or by a promotion.

HONEY PURCHASING

Shoppers buy honey from the major food retail channels as well as from specialty sources

Honey Purchase Channels

(Please indicate where you typically purchase HONEY.)



Most shoppers today source their groceries from traditional grocery stores and mass merchandisers / supercenters, followed by other traditional food channels. However, far more than most other grocery items, honey also finds its way into home through farmer's markets, local coops and even beekeepers. This suggests that even as honey purchased to restock supplies, it is still considered a special purchase, with requirements not always met by conventional retail channels.

Goodness Seekers utilize a broader range of channels for honey, especially natural stores. They also use mass/supercenters more, suggesting that they shop for a greater diversity of honey needs, purchasing different types of honey from different sources.

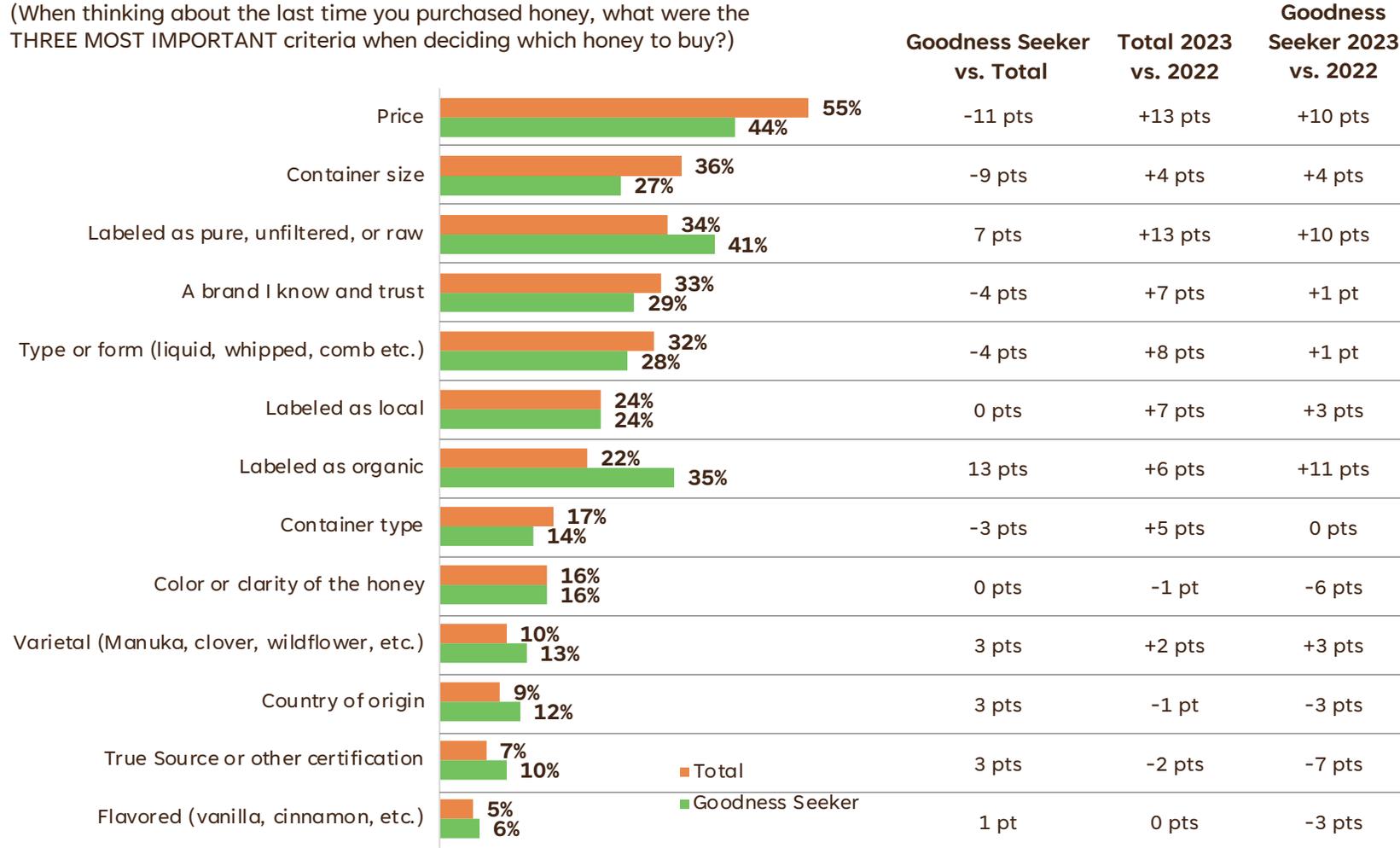


HONEY PURCHASING

Price gained in importance as a honey selection criterion, but not at the expense of other distinctions

Top Criteria When Deciding Which Honey to Buy

(When thinking about the last time you purchased honey, what were the THREE MOST IMPORTANT criteria when deciding which honey to buy?)



Shoppers in 2023 are more likely than in prior years to cite price as one of their key decision factors when selecting honey. However, practicalities such as container size or honey form also remain highly relevant, as do quality distinction such as pure, local or organic. This implies that the shopper’s quality standards have not shifted, making deals and promotions more attractive, and more relevant than value-oriented alternatives.

Goodness Seekers are less focused on price or brand and more on several specific quality distinctions. Even more than in the past, they seek organic and/or pure, unfiltered or raw honey. They should find store brands with these characteristics increasingly relevant.



Purchase of honey in bulk size containers has declined considerably

CONTAINER SIZE (as share of purchases)



12%

are large/bulk size (>24 oz)
-12 pts from 2022

16% among Goodness Seekers



88%

are medium/small size (\leq 24 oz)
+12 pts from 2022

84% among Goodness Seekers

CONTAINER TYPE (as share of purchases)



32%

are bought as a glass bottle/jar
-4 pts from 2022

39% among Goodness Seekers



66%

are bought as a plastic/squeeze bottle
+4 pts from 2022

60% among Goodness Seekers

A rough picture of the sales mix of different types of honey can be gleaned from profiling the most recent purchase of each honey shopper. More budget-conscious in 2023, shoppers are reaching for smaller or medium size containers of honey, compared to 2022. The material of the honey containers they buy has held more stable, with two-thirds of recent honey purchases being plastic or squeeze bottles. These choices may mirror what is available in stores for everyday honey, rather than a conscious choice of one material over the other, and Goodness Seekers, who reach for higher-quality honey products more often than general shoppers, thus tend to purchase glass bottles or jars more frequently.

HONEY PURCHASING

Liquid honey continues to dominate purchases, coming from different types of brands, with raw/unfiltered and US-made the most commonly bought claims

FORMS (as share of purchases)



93%

purchased liquid honey

+3 pts from 2022

95% among Goodness Seekers



7%

purchased another form (spread, whipped, honeycomb)

-3pts from 2022

5% among Goodness Seekers

BRAND TYPES (as share of purchases)

		2023 vs. 2022	Goodness Seeker	Goodness Seeker 2023 vs. 2022
Local Brand	35%	-2 pts	35%	-6 pts
National Brand	33%	+3 pts	40%	+4 pts
Store Brand	21%	+2 pts	19%	0 pts
Don't know/remember	11%	-3 pts	6%	+1 pt

KEY BENEFITS

		Goodness Seeker
Raw, Unfiltered, 100% pure	47%	60%
Product of the USA	43%	46%
Organic	36%	55%
Locally produced	34%	33%
Non-GMO	16%	20%
Specific floral variety (such as Manuka or clover)	10%	12%
Imported from another country	3%	5%
None of the above	8%	3%

In their last purchase of honey, shoppers bought local and national brands in nearly equal numbers, with store brands not far behind. Purchases by Goodness Seekers tend to include more quality distinctions, especially organic. While organic purchase may be overstated, almost all shoppers who report any past-year organic also indicate this for their last purchase, suggesting consistency among these buyers.



HONEY PURCHASING

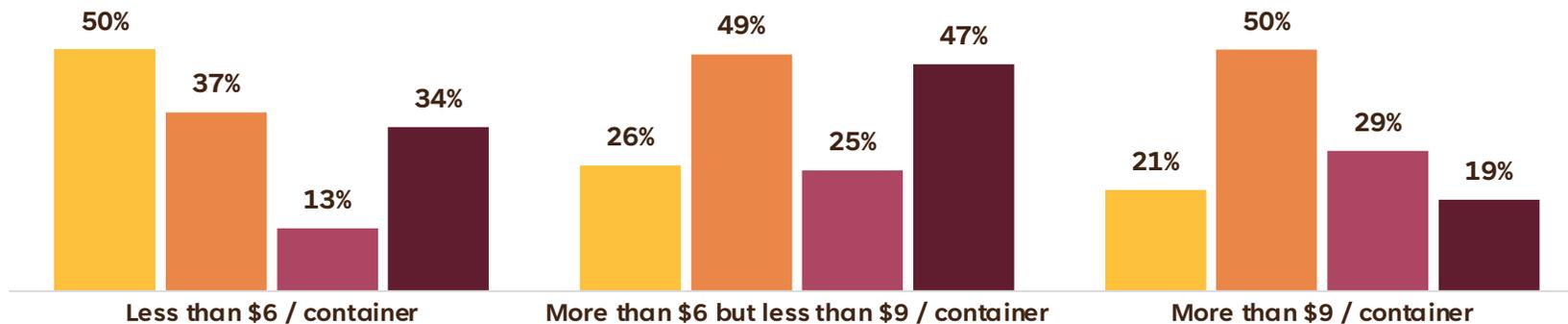
Prices shoppers report paying for honey reflect the changing grocery price landscape

Where in 2020, half of shoppers reported paying less than \$6 per container, today only one-fifth say their honey purchases fit in this price level, despite now buying smaller container sizes. On the other end of the price spectrum, reports of paying more than \$9 per container spiked in 2021 and are now down to 2020 levels, likely because shoppers are purchasing fewer large/bulk sizes. Purchasing honey on sale or in promotion is also down vs. 2022, even as the relevance of such deals has arguably increased.



PRICE PAID (as share of purchases)

2020 2021 2022 2023



PURCHASED ON SALE, PROMOTION OR DISCOUNTED



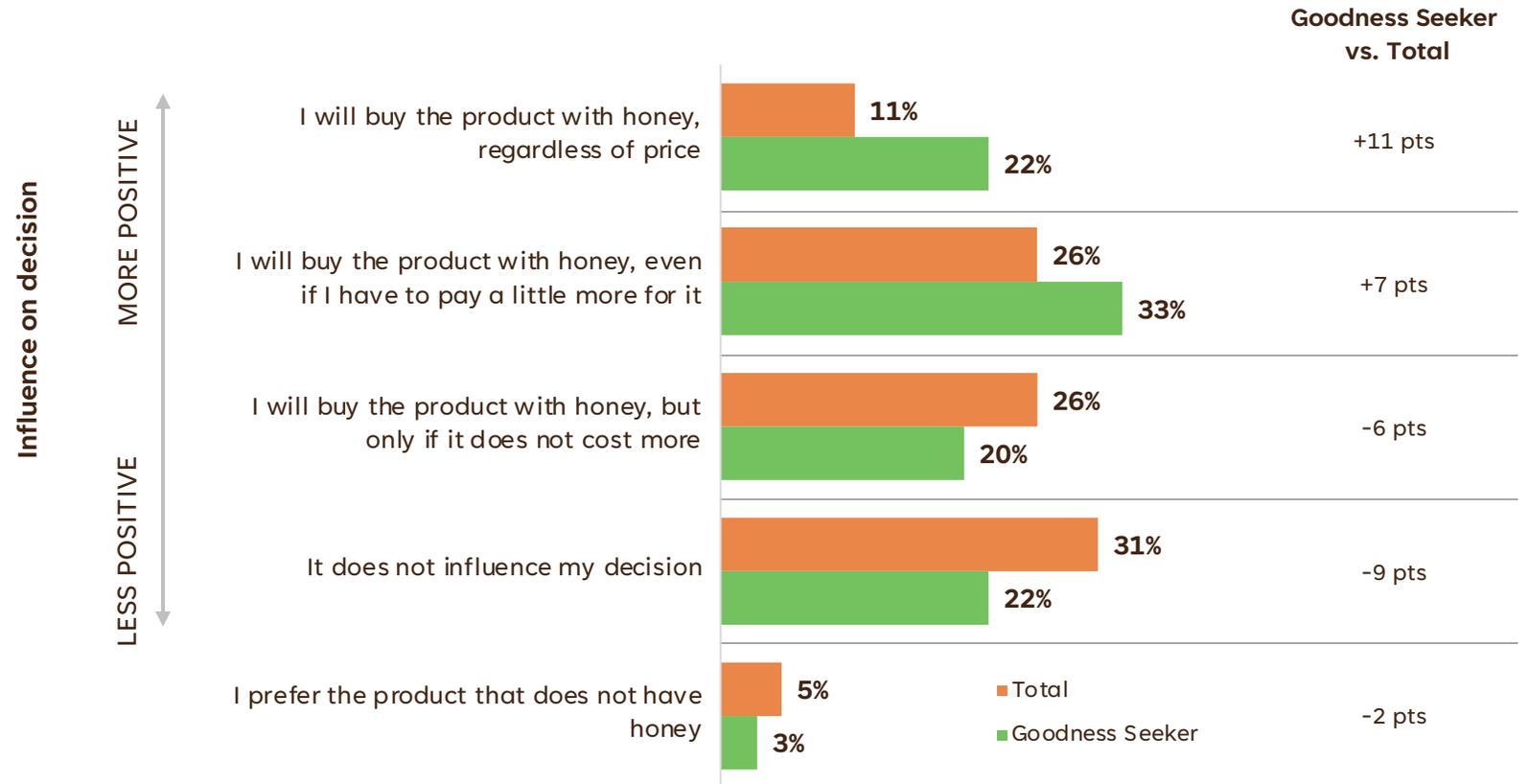
When shoppers choose between grocery products with and without honey, the presence of honey typically works as a positive decision influencer. It is balanced against price, with different shoppers placing different levels of value on price vs. presence of honey. Over a third (37%) of shoppers (and over half of Goodness Seekers) say they are willing to pay more for the product with honey. Another quarter prefer the product with honey but aren't willing or able to pay more for it.

HONEY PURCHASING

The presence of honey in other food products positively affects nearly two-thirds of purchases

Impact of Honey Inclusion on Product Value Perception

(Which statement most accurately reflects which product you will purchase?)



Total (n=2,265), Goodness Seeker (n=379).

HONEY PURCHASING

After a dip in 2019-2022, the shopper's willingness to pay a premium for products including honey as an ingredient has returned to near its 2018 level

Impact of Honey Inclusion on Product Value Perception - Trend
(Which statement most accurately reflects which product you will purchase?)

		TOTAL						GOODNESS SEEKER					
		2018	2019	2020	2021	2022	2023	2023 vs. 2022	2021	2022	2023	2023 vs. 2022	
Influence on decision	↑ MORE POSITIVE	I will buy the product with honey, regardless of price	17%	4%	6%	10%	11%	11%	+1 pt	24%	25%	22%	-3 pts
		I will buy the product with honey, even if I have to pay a little more for it	24%	14%	16%	17%	16%	26%	+10 pts	28%	29%	33%	+6 pts
		I will buy the product with honey, but only if it does not cost more	22%	27%	27%	25%	24%	26%	+2 pts	16%	20%	20%	0 pts
		It does not influence my decision	32%	45%	39%	36%	40%	31%	-9 pts	22%	20%	22%	0 pts
	↓ LESS POSITIVE	I prefer the product that does not have honey	6%	10%	12%	12%	9%	5%	-3 pts	10%	6%	3%	-3 pts

On the other hand, fewer now claim honey presence does not influence or possibly deters their product selection. Goodness Seekers have been more consistently willing to pay for the benefits honey brings to them.



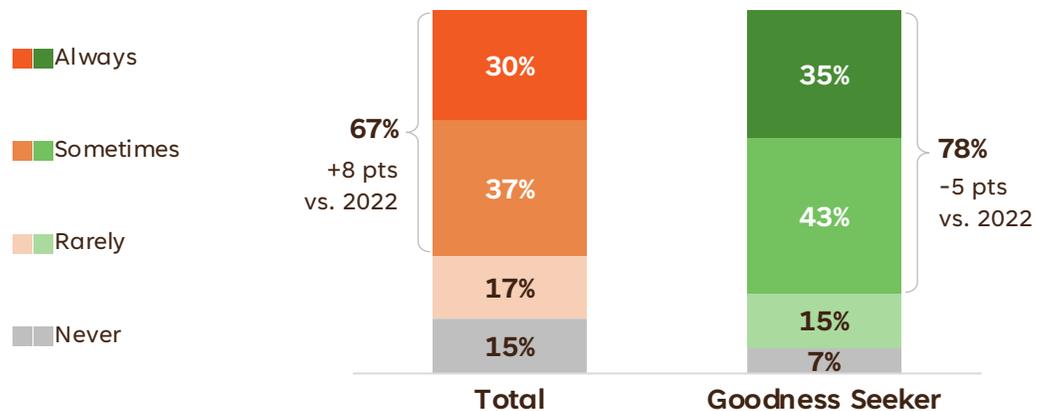


HONEY PURCHASING

The majority of shoppers regularly check for country of origin on jars

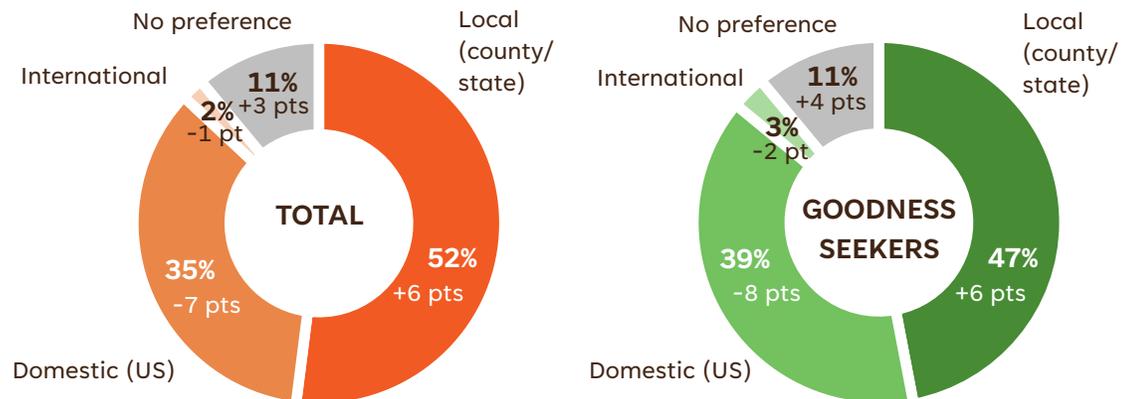
Consideration of Origin in Purchasing

(When purchasing honey, do you check for the country of origin?)



Origin Preferences

(Where do you prefer your honey to be from?)



While country of origin ranks low as a decision criterion, shoppers do want to understand where their honey comes from and regularly check the label for this information. The frequency with which they do so has increased from 2022 among shoppers overall but decreased among Goodness Seekers.

Shoppers vastly prefer honey that originates from local or other domestic sources, with a shift towards more local provenance within that (consistent with the increased importance of “local” claim as a decision factor this year).

Goodness Seekers maintain more variety in their pantries by adding a higher-quality honey product

ON HAND AT HOME

1.8

Containers of honey at home among **TOTAL** honey buyers

51% have more than one container

2.2

Containers of honey at home among **GOODNESS SEEKERS** who buy honey

67% have more than one container

CONTAINERS



FORMS



BENEFITS



	Bought past 12 months Total	Goodness Seeker	GS vs. Total
Plastic bottle	52%	54%	2%
Squeezable bottle	52%	48%	-4%
Glass bottle/jar	47%	57%	10%
Liquid	92%	95%	3%
Another form (spread, whipped, comb)	16%	21%	5%
Raw, Unfiltered, or 100% pure	51%	58%	7%
Labeled as product of the USA	46%	51%	5%
Locally produced	45%	45%	0%
Organic	39%	56%	17%
Specific floral variety	17%	17%	0%
Non-GMO	15%	18%	3%
Imported	7%	11%	4%

While the typical honey shopper keeps one container at home (46% have one), Goodness Seekers usually have a couple (46% have two). Their additional container tends to come from the greater variety they purchase throughout the year. That is, in addition to the plastic or squeezable bottle, they might have a glass jar, and in addition to other benefits and distinctions, they might have organic.



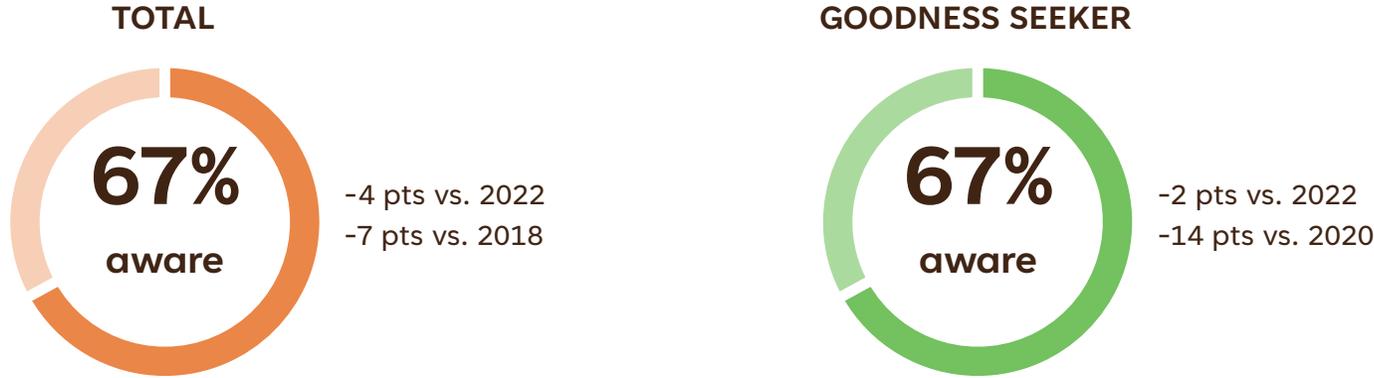
EVOLVING PRIORITIES AND ALTERNATIVES:
SUSTAINABILITY PERCEPTIONS

SUSTAINABILITY PERCEPTIONS

Awareness of declining honey bee populations has been slowly falling but remains high

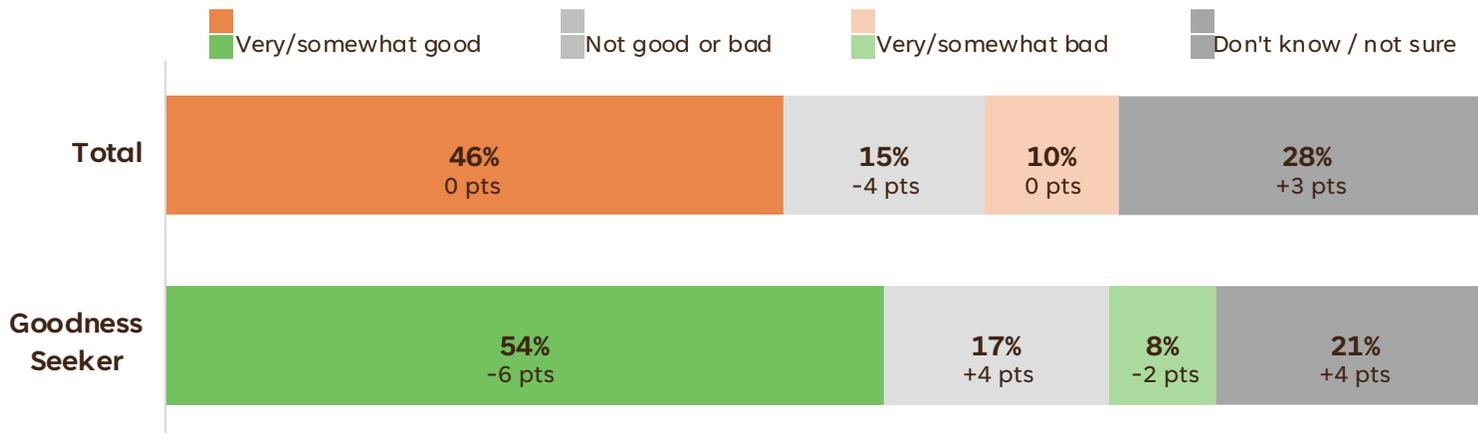
Awareness of Declining Honey Bee Population

(Are you aware of the declining honey bee population?)



Impact of Using Honey on Honey Bees

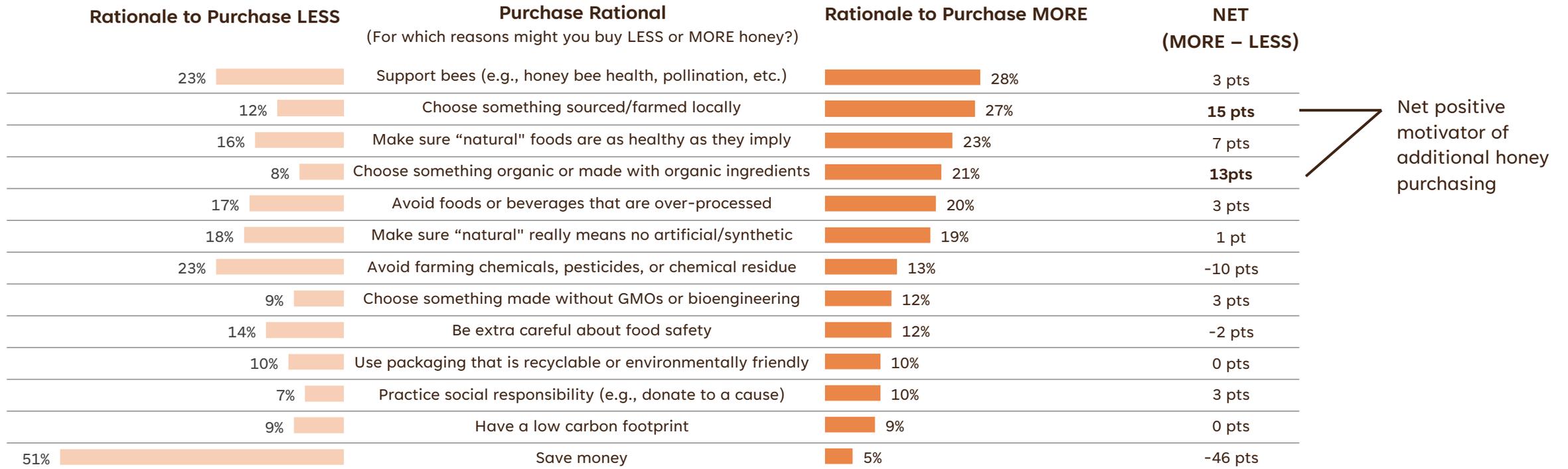
(Which of the following best describes your impression of whether using honey is good or bad for honey bees?)



Two-thirds of shoppers and Goodness Seekers are aware of declining bee populations – a slight decrease from 2022 for both and a larger one over the past five years. Around half of both shoppers overall and Goodness Seekers see using honey as beneficial to bees, though this view has declined about Goodness Seekers from 2022. The other half of both audiences see honey as either neutral or negative for bees or aren't sure – suggesting a level of confusions across the population about how honey affects bees.

SUSTAINABILITY PERCEPTIONS

Support for bees is a key reason for increased, but also decreased, honey purchasing, while local and organic sourcing are net positive motivators

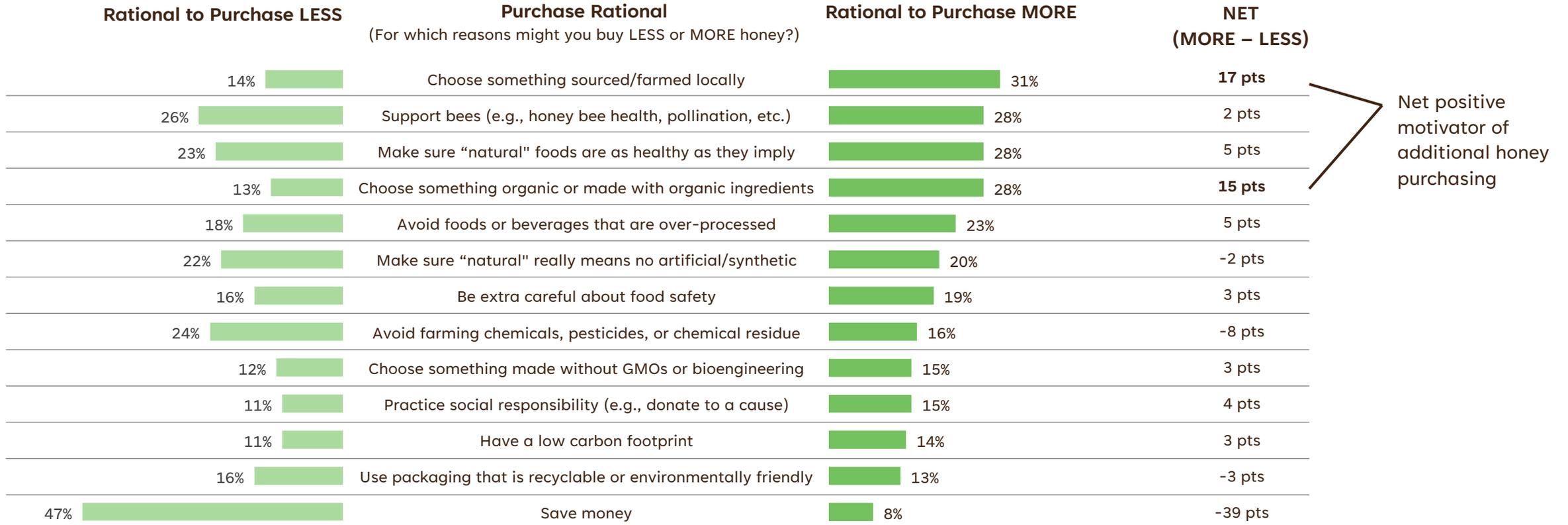


Reflecting the high awareness of honey bee declines, support for bees is the strongest motivator for additional honey purchasing. However, support for bees is also among the top two reasons to buy *less* honey, suggesting that absent of further education on this issue, some of those who aren't sure whether honey is good or bad for bees might err on the side of avoidance when it comes to making changes to their own consumption.

On the other hand, local and organic sourcing are also effective motivators and present less risk of a potential unintended reaction.

SUSTAINABILITY PERCEPTIONS

Similarly, support for bees can be both a motivator and a deterrent of honey purchasing for Goodness Seekers



Nearly equal numbers of Goodness Seekers say wanting to support bees would lead them to buy more and less honey. As with shoppers overall, messages focused on local and organic sourcing offer a more clearly positive direction as motivators.

While a theoretical increase in honey purchasing might be motivated by social good, sustainability concerns during the more practical act of shopping are equally grounded in priorities which connect with tangible benefits to shoppers. It is therefore unsurprising that the most common sustainability-related objective for honey shoppers is about product purity, followed closely by the need to ensure that “natural” delivers on these needs. In this context, support for bees is an exceptionally popular objective, on par with these other priorities that connect with personal benefit for the shopper.

While Goodness Seekers place more priority on sustainability in general, they give special attention to specific attributes such as organic, non-GMO and low carbon footprint.

SUSTAINABILITY PERCEPTIONS

Personal benefits around product safety and quality are key in honey purchasing

Sustainability Attribute Importance for Honey

(When choosing HONEY or PRODUCTS SWEETENED WITH HONEY, how important to you is it to...?) Showing Top 2 Box Extremely/Very Important

		Goodness Seekers	Goodness Seeker vs. Total	
Avoid farming chemicals, pesticides, or chemical residue	72%	86%	14 pts	
Make sure "natural" really means no artificial or synthetic ingredients	70%	89%	19 pts	G
Support bees (e.g., honey bee health, pollination, etc.)	69%	83%	14 pts	G
Make sure "natural" foods are as healthy as they imply	68%	88%	20 pts	G
Be extra careful about food safety	65%	82%	17 pts	G
Avoid foods or beverages that are over-processed	64%	81%	17 pts	G
Choose something sourced/farmed locally	59%	78%	19 pts	G
Choose something organic or made with organic ingredients	53%	80%	27 pts	G
Choose something made without GMOs or bioengineering	52%	77%	25 pts	G
Use packaging that is recyclable or environmentally friendly	51%	72%	21 pts	G
Save money	50%	60%	10 pts	G Z
Have a low carbon footprint	47%	69%	22 pts	G
Practice social responsibility (e.g., a percentage of proceeds donated to a cause)	40%	65%	25 pts	G M

B Boomers

X Gen X

M Millennials

Z Gen Z

G Goodness Seekers

👶 Household with kids

SUSTAINABILITY PERCEPTIONS

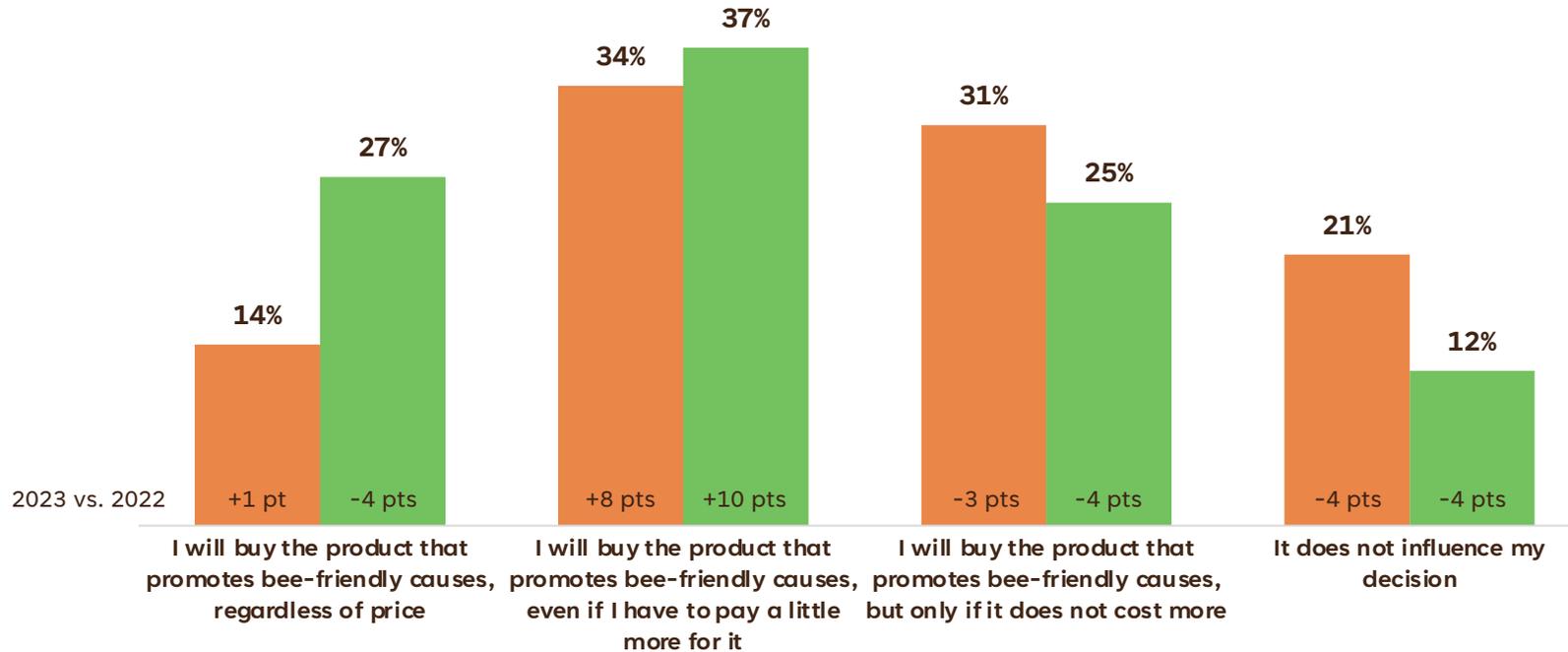
Willingness to pay more for products that champion bee-friendly causes is strong



Impact of Bee-Friendly Causes on Product Value Perception

(Which statement more accurately reflects which product you will purchase?)

■ Total ■ Goodness Seeker



Nearly half of all shoppers and nearly two-thirds of Goodness Seekers say they are willing to pay more for products that promotes bee-friendly causes. For both audiences, this is an increase from 2022.



ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy in the world. Companies and brands across all segments of the food and beverage industry benefit from our unparalleled depth of knowledge on consumers, culture, trends, and demand-side market strategy. We listen closely to understand our clients' business challenges and tailor solutions that deliver transformative results. Through a unique suite of integrated custom, primary research capabilities, market analytics, and business strategy services, we uncover opportunity spaces and avenues for growth. We deliver more compelling insights that fuel inspiration and ideas for innovation.

3150 Richards Road, Ste. 200 Bellevue, WA 98005

Tel (425) 452 0818 Fax (425) 452 9092

www.hartman-group.com

