



Building consumer demand for organic food

Introduction

Increasing demand for organic food is a key lever for reaching the EU's 25% organic production target. This requires demand-side action alongside facilitating organic production. In 2023, retail sales of organic products in the EU reached about €46.5 billion, yet organic food still represents only a modest share of total food sales in most Member States¹.

To reach 25% organic farmland by 2030, consumers must find organic easy to buy in everyday shopping: visible across categories, trusted, and affordable.

The typical organic consumer is concerned about the environment, health, and safety matters, and is less concerned about food prices². Efforts to grow the organic market mostly rely on information that appeals to the individual's motivation. Organic labels help inform choices if consumers know and have trust in the label³.

The European Commission offers funding for initiatives that promote EU agricultural products with EU quality labels. 90 organic product campaigns have been supported, covering many countries and products within but also outside the EU.

The European Commission's Vision for the Future of Agriculture and the EU Directive on empowering Consumers for Green Transition (EU 2024/825) highlight the need to enable consumers to make

Summary

- Strategies to boost demand for organic food rely on giving information to consumers and appealing to their motivation.
- Our experimental study reveals that availability and assortment are equally crucial for increasing organic choice.
- Competing marketing and sustainability messaging divert attention away from organic.
- Attractive organic offers are a key lever for increasing organic purchase.
- Policy and retailers need to address unsubstantiated sustainability claims that undermine organic demand.
- Different, substantiated sustainability claims need to be coordinated to avoid cannibalising on the organic market.
- The aim should be to make organic the easy default for everyday shopping - visible, trusted, and affordable.

¹ Willer H, Trávníček J, Schlatter, B (2025). *The World of Organic Agriculture 2025 Statistics and Emerging Trends*. Frick, Bonn: FIBL, IFOAM - Organics International. <https://orgprints.org/54617>.

² Leonidou, L. C., Eteokleous, P. P., Christofi, A.-M., & Korfiatis, N. (2022). Drivers, outcomes, and moderators of consumer intention to buy organic goods: Meta-analysis, implications, and future agenda. *Journal of Business Research*, 151, 339-354. <https://doi.org/https://doi.org/10.1016/j.jbusres.2022.06.027>

³ Macready, A. L., Hieke, S., Klimczuk-Kochańska, M., Szumiał, S., Wachter, K., Arnoult, M. H., Vranken, L., & Grunert, K. G. (2025). Why trust is crucial – The moderating role of trust in the relationship between motivation and intention to buy healthy, sustainable and novel foods. *Food Quality and Preference*, 126, 105386. <https://doi.org/https://doi.org/10.1016/j.foodqual.2024.105386>

informed sustainability choices and to tackle unfair commercial practices including misleading environmental claims (greenwashing).

Key findings

Consumer demand for organic is shaped by the motivation (why and how much they value organic), ability (understand, recognise, and afford organic) and opportunities (availability and how much organic stands out in the choice environment). Across Europe, studies consistently identify three practical conditions that increase organic purchasing: (1) organic options are available across everyday categories; (2) the EU organic logo is easy to spot and trusted; (3) consumers are not overloaded with competing sustainability claims⁴.

The choice architecture of the supermarket (assortment, placement, pricing, label clarity) strongly shapes whether organic products end up in the basket. The supermarket assortments are carefully curated and hinge on both strategic decisions and how products perform in sales, but there is less research quantifying the impact of this factor.⁵ To better understand its role, we investigated in the OrganicTargets4EU project how exactly the organic assortment and other aspects of the supermarket choice architecture influence organic food purchases. We tested these mechanisms in a simulated online supermarket visited repeatedly by consumers in Denmark, Germany, Italy, and Romania.

- When the organic assortment was expanded relative to conventional, organic choices increased to a similar level, even with a price premium.
- The repeated exposure to organic options in all product categories increased organic choices, over and above the mere availability effect.
- By contrast, adding other labels (e.g., climate labels, premium branding, or bestseller cues) did not strengthen organic choice—their presence on conventional products reduced organic choices.

Labels used in the supermarket experiment

EU organic	“EU” climate	Social norm nudge
		
Private-label premium brand	Private-label basic brand	Premium brand
		

⁴ Schleenbecker, R., & Hamm, U. (2013). Consumers’ perception of organic product characteristics: A review. *Appetite*, 71, 420-429. <https://doi.org/10.1016/j.appet.2013.08.020>

⁵ Sadler, A., Moran, D., & Jaacks, L. (2024). Effectiveness of real-world marketing of organic foods and beverages: A systematic review of recent evidence. *PLOS Sustainability and Transformation*, 3(8), e0000123. <https://doi.org/10.1371/journal.pstr.0000123>



This underlines the importance of availability, visibility, clarity, and repeated exposure. A sustainability label can increase consumer choices, but the marginal effect of additional labels is much smaller, and multi-label contexts can create confusion and sustainability trade-offs.⁶

Development needs and challenges

Meeting the organic growth targets requires a robust and predictable market for organic products. Information campaigns play a part, but evidence suggests that campaigns alone are not enough: policymakers and retailers also need to remove everyday barriers such as limited availability, higher prices, and confusion in a crowded label environment.⁴

Reaching more consumers and increasing consumer demand require improved availability of organic products and clear ways to identify them, both in retail and in catering outlets, as well as improved understanding and communication of the benefits of organic.

There is a need to strengthen trust and clarity of the EU organic logo with clear communication about robust control and the consistent use in retail environments. Misleading or overlapping sustainability claims (“label jungle”) can dilute organic messaging.

There is also a need to improve price transparency and affordability—e.g., entry-level organic price points, fair promotions, and fiscal tools such as lower VAT—where feasible.

Supermarkets can do more to make it easier for people to choose organics—for example by broadening range, improving what’s on the shelves, and using clearer labels and simple information or prompts (nudges) that guide shoppers’ choices⁷.

Policy recommendations

Policymakers can contribute to stimulating consumer demand for organic products as a strategic lever to reach ambitious goals for organic sector development. The aim should be to make organic the easy default for everyday shopping—visible, trusted, and affordable.

The EU Commission should protect and strengthen the EU organic logo by enforcing controls and curbing misleading environmental claims

- Publish practical guidance for using additional food sustainability labels alongside the EU organic logo in line with the empowering consumers to make sustainable choices and avoiding consumer confusion and trade-offs.
- Improve market and price transparency by monitoring organic price premiums and retail margins (e.g., via a market observatory) to support evidence-based action (see Policy Brief #10 Statistics).
- Developing guidance on combining the organic logo with national or regional identifiers and supporting research on the effectiveness of the compulsory EU/non-EU indications.

⁶ Sonntag, W. I., Lemken, D., Spiller, A., & Schulze, M. (2023). Welcome to the (label) jungle? Analysing how consumers deal with intra-sustainability label trade-offs on food. *Food Quality and Preference*, 104, 104746. <https://doi.org/https://doi.org/10.1016/j.foodqual.2022.104746>

⁷ Nudging Organic <https://demooisteboodschapisbio.be/wp-content/uploads/2025/04/Sustainable-Nudging-Report-2025-common.pdf>



The EU Commission should continue EU promotion funding to improve consumer recognition of and trust of organic and the EU organic logo

- Coordinating promotion campaigns for organic, specifically transnational organic products in different Member States and in collaboration with the private sector.
- Emphasising the significance of organic as the only EU regulated scheme for sustainable production with clear control and encourage education campaigns about the environmental and social benefits of organic food and farming.

The EU Commission should develop guidance on what claims can be used for organic and conventional products

- Ensure recognition of organic product attributes concerning health, climate, environment, and animal welfare using suitable methods that can differentiate between production systems.
- Enable consumers to compare reliably organic with other sustainability claims and labels to avoid greenwashing.

National and regional policymakers should support the private sector in improving the availability and visibility of organic food in retail and in catering outlets

- Encourage retailers to offer a wider range of organic choices as a strategy to increase the share of organic sales and improving visibility through distributed placement (including online), shelf markers and clear labelling, as well as branding and packaging.
- Introduce clear labelling rules for organic ingredients in public and hospitality catering (e.g., Denmark's catering label with gold, silver, and bronze statues).
- Use national and regional Organic Action Plans (see Policy Brief #13 Organic Action Plans) to implement these recommendations.

Further information

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