National Honey Board™

Hartman GROUP

U.S. Honey Consumer A&U

August 1, 2024

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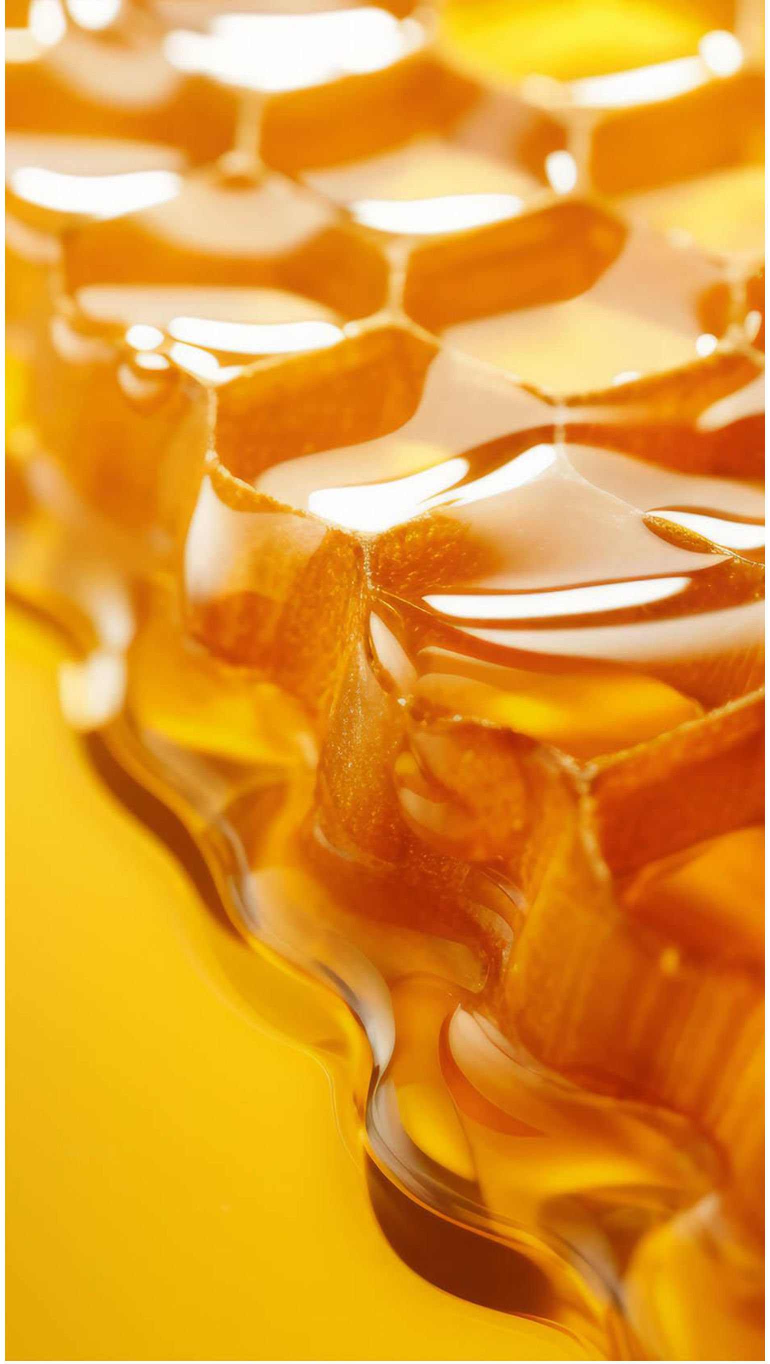


OBJECTIVES AND METHODOLOGY

Objectives and Methodology

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

- Tracking awareness, self-reported usage, and attitudes towards and perceptions of honey and other sweeteners
- Assessing emerging trends, including spicy hot honey and raw honey

Results will be used to:

- Help guide program strategies and messaging and gauge program effectiveness
- Refine the target segment most amenable to honey (new in 2024)

Methodology:

- An online survey fielded May 9-20, 2024 to a total sample of n=2,469 adult food shoppers, including the Natural Nourishers segment (n=475)
- Average length of interview: 25 minutes
- Qualifying respondents were 18-78 years of age, with demographic balance on age/gender, ethnicity, income, household structure, and region for potential honey user
- Based on qualification rates, results are weighted to reflect characteristics of adults who are responsible for or share the responsibility for grocery shopping and food preparation and are not allergic to honey

Changes from 2023

2024 data is weighted based on a gen pop sample. A new segmentation was created that replaces the original Goodness Seekers with Natural Nourishers, so segment trending will not be shown.

Icons indicate consumer groups that index at ≥120 vs. Total

- Z Gen Z
- M Millennials
- X Gen X
- B Boomers
- N Natural Nourishers
- Households with kids

The Natural Nourishers segment comprises shoppers aligned with key honey benefits:

- Good for me - focused on health and wellness through intentional practices including eating healthy nutritious organic foods and exercising regularly
- Good for the planet – interested in natural, chooses products for inherent health reasons
- Food involvement - engaged with reading labels and cooking experimentation
- Natural orientation – seeks natural benefits from foods vs. enhancements are prioritized

Demographics of U.S. Shoppers (excluding those allergic to honey)

45% Male

55% Female

10% Gen Z Adult (18-27)
26% Millennial (28-43) N
28% Gen X (44-59) N
36% Boomer (60-78)

60% Married or living with significant other

37% <$50k Z
19% $50k-$74k M
12% $75k-$100k
31% $100k+

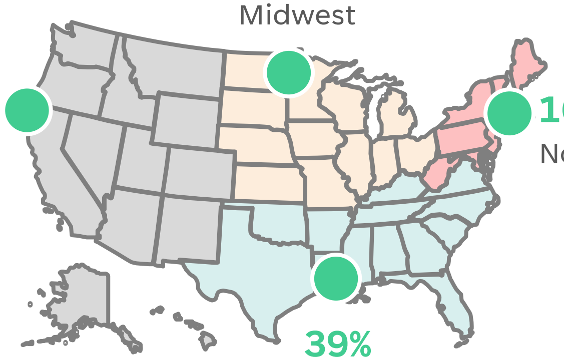
24% M N have children in the home

22% Midwest

24% West

N

16% Northeast



39% South

Z Gen Z | M Millennials | X Gen X | B Boomers | Households with kids | N Natural Nourishers

Demographics. Total (n=2,469). Profile based on respondents weighted to represent the 86% of U.S. adults, 18-78 yo, who shop for food (92%) excluding 6% claiming allergies to honey.

Natural Nourishers warrant special attention to maintain and grow usage and engagement with honey

Natural Nourishers

		%	Index
Demographics	25–54-year-olds	100%	
	Households with kids	48%	200
	Pacific region	20%	124
	Non-white	47%	134
Honey Usage	Heavy user	42%	172
Favorite Sweetener	Honey	38%	149
Sweetener priorities (Top 2)	Natural	22%	175
	Healthy	20%	138
Honey preferences (Top 4)	Price	49%	84
	Labeled as organic	33%	155
	Labeled as local	30%	120
	Labeled as unfiltered or raw	29%	136
Barriers	I see no challenges in eating more honey	33%	108
	Honey is too expensive	21%	110
	Already consume enough honey	17%	130
Honey motivations	Avoid farming chemicals, pesticides, or chemical residue	88%	122
	Purchase products that benefit your health	88%	124
	Make sure "natural" really means no artificial or synthetic ingredients	88%	123

Natural Nourishers represent an important segment of younger adults who share a distinctive mix of attitudes and tend to be heavy users of honey. Accounting for over one out of six shoppers, this segment comprises Millennial and Gen X shoppers who are interested in nutrition and engage with food. Their interest in the environment is led by their interest in health and wellness. Most of all, they believe that **naturally occurring ingredients** deliver greater benefits than scientific formulations.

These consumers have a variety of hobbies and interests and tend to engage in yoga, meditation and gourmet cooking. Natural Nourishers are on social media (YouTube, Facebook, Instagram) more so than the population as a whole and follow food and recipe blogs. This report will call out distinctive findings Natural Nourishers and will highlight opportunities to connect with them specifically.

Natural Nourishers

		%	Index
Hobbies	Yoga	21%	198
	Meditation	27%	179
	Gourmet cooking	32%	170
	Singing / Choir	11%	162
	Blogging or posting to social network sites	11%	157
Social Media	YouTube	62%	148
	Facebook	52%	123
	Instagram	49%	161
	Food or recipe blogs	37%	157
	TikTok	32%	145

Base: Natural Nourishers (n=475).

Indices ≥ 120 are highlighted **orange**, indices ≤ 80 are highlighted **blue**.

Executive Summary

Findings and Implications | Awareness

Consumers have positive perceptions of honey and often think of it when they consider sweeteners

- Both as a favorite sweetener and as being top of mind, honey ranks a close second behind sugar.
- Recall of honey in the media is positive. More consumers recall reading or hearing **positive** stories or messages about honey than about other sweeteners. Television and social media are the most prevalent sources, with food and recipe blogs also sources of positive stories.
- The overall percentage of consumers using honey remains steady; however, there is a slight shift to lighter users.
- Honey is chosen as a natural product and appreciated for its flavor, familiarity and health benefits. While honey's performance on attributes outpaces the importance consumers place on them, gaps in ease of use and value are small, creating areas of opportunity.

Honey holds a strong position in the sweetener category and performs well across attributes. Opportunity exists to reinforce ongoing awareness to keep honey top of mind and to reverse the trend toward lighter usage. Additionally, widening the gap in performance vs. importance in areas such as value and ease of use can give consumers more reasons to use honey. Continue to highlight the value of honey, despite a higher cost. Innovation around packaging or dispersion of honey could help improve convenience and ease-of-use perceptions.

Findings and Implications | Usage

Honey is a versatile product used for a range of eating and non-food occasions

- Honey has its most widespread application in beverages such as tea, coffee or smoothies. While 62% say they typically use honey in one of these beverages, non-caloric sweeteners, including Stevia, are strong competitors in this space.
- Mealtime is another common time for honey usage. In general, sweeteners are used most heavily at breakfast, with honey being the second most broadly used sweetener after maple syrup. While later meals (lunch/dinner) and snacks see lower sweetener usage, honey is the most used sweetener during these dayparts.
- Users incorporate honey in both cooking and baking. However, other sweeteners have a strong hold in baking, specifically white, brown and other sugars. Brown sugar competes strongly with honey in cooking.
- Finally, honey's unique role for medicinal purposes has a halo affect, helping to influence the overall healthy perception of honey.
- Most consumers expect their consumption of honey to remain consistent for the next year as some say they don't expect to change their eating approaches. However, since consumers generally aspire to healthier habits, there remains the opportunity encourage the addition or substitution of honey for improved health.

Continue to message the natural and healthful aspects of honey to help grow honey usage across eating occasions and add incremental usage. Highlighting its medicinal benefits links to a positive 'food as medicine' aspiration, giving consumers more reasons to choose honey elsewhere in their diets.

Findings and Implications | Attitudes

Honey's advantages over other sweeteners include being natural, healthful and flavorful

- Shoppers consider honey to be generally healthy. While not typically chosen for being low in calories, honey is not villainized for its calories like sugar is. This is likely because honey is specifically perceived as a good source of nutrition rather than empty calories. Shoppers recognize honey as good for the immune system and to a lesser degree good for digestive health.
- Purity is another perceived strength, i.e., no added ingredients, unprocessed and organic.
- Consumers say they choose sweeteners in general based on convenience, flavor, ease of use and value. While honey does outperform on all these metrics, it is most recognized for flavor, leaving convenience, ease of use and value as larger opportunities.
    - Coconut sugar, although small, meets many of the same needs as honey. Growth of this as well as other natural sweeteners should be monitored.
- Health messages, including the message that honey contains a wide array of vitamins, minerals, amino acids and antioxidants, along with being all-natural and unprocessed, resonate most with consumers.
- However, barriers such as price, aspirational improvements in diet (such as reducing calories or sugar intake) and reaching the consideration set are all real.

Continue to message both the naturalness of honey as well as health benefits. These are two of the more accepted benefits and by continuing to keep these top of mind, there is opportunity to increase honey usage. Complementary messages around specific health benefits including honey's nutritional value (from vitamins, minerals, amino acids and antioxidants) is a motivating message to many.

Findings and Implications | Path to purchase

Although honey is typically a planned purchase, promotions play a role

- Most purchase honey at a traditional grocery store or mass merchandiser, typically as a planned purchase. Fewer trips are unplanned, but promotions or special varietals can attract attention.
- Farmers markets, local cooperatives and beekeepers are sources of acquisition for honey more so than for other categories of food products.
- Standard product features such as price, size and form are most important when shopping for honey. Natural Nourishers also tend to value raw or unfiltered claims.
- Consumers appear to be trading down slightly in container size, moving from a medium to a smaller size container. Squeezable plastic is common among shoppers overall, while Natural Nourishers tend to purchase glass in addition to—rather than instead of—squeezable options and are more likely to keep honey out on the kitchen counter.
- Organic and "local" honey have broad appeal, especially among Natural Nourishers.
- Shoppers tend to prefer and value the inclusion of honey as an ingredient in packaged foods or beverages they buy. Compared to last year, slightly fewer are now willing to pay extra.
- Among those who purchase flavored honey, half report buying fruit/berry but almost as many say they have purchased spicy-hot in the past year.

Shopper habits and preferences support opportunities for package innovation. General honey users like the convenience and ease of a squeeze bottle, while heavier users tend to purchase a glass container or hard plastic. Innovations to facilitate serving honey from each type of container or keeping them out on the counter could increase usage.

Honey Fast Facts: Total

#2 Honey sits just behind white sugar as a favorite sweetener with 26% of shoppers choosing honey as their favorite.

52% Believe using honey is very/somewhat good for honey bees, up 6 percentage points from 2023.

54% Report using honey multiple times a month, with 25% being heavy users.

69% Over 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 52%.

55% Among the 17% of shoppers who recall hearing a positive story about sweeteners, 55% say it was a story about honey. Only 2% of those who heard a negative story about sweeteners (23%) heard a negative story about honey.

Honey Fast Facts: Natural Nourishers

#1

Honey is the favorite sweetener among 38% of Natural Nourishers, double that of sugar (19%).

58%

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

75%

Report using honey multiple times a month, with 42% being heavy users.

73%

Almost three-quarters of Natural Nourishers say they are aware of the declining honey bee population.

#1

Beverages, including tea and coffee, are the #1 use of honey at 69%, followed by use at breakfast at 63%. Natural Nourishers over-index on all meal occasions, snacks, mixed drinks, medicinal and beauty purposes.

61%

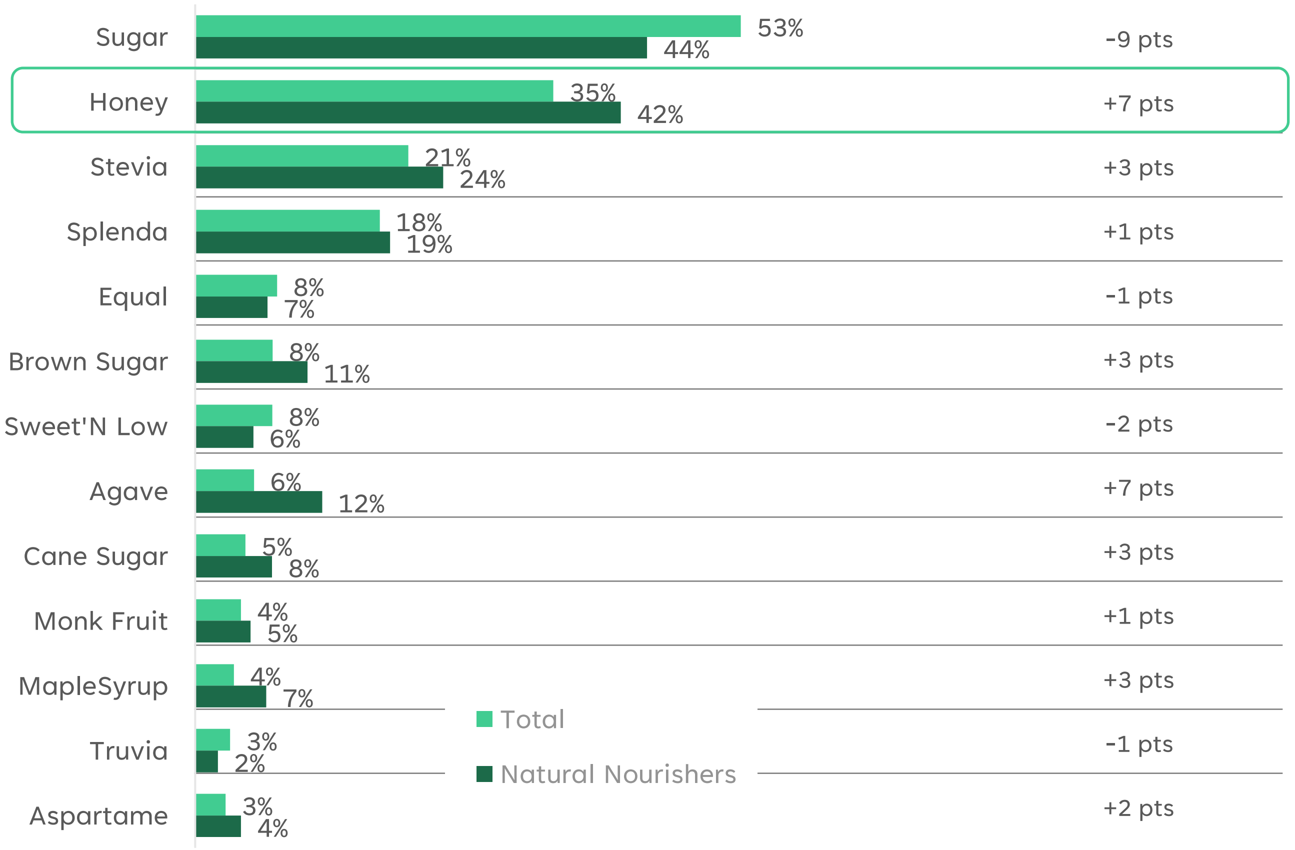
Among the 30% of shoppers who recall hearing a positive story about sweeteners, 62% say it was a story about honey. Only 2% of those who heard a negative story about sweeteners (29%) heard a story about honey.

SWEETENER AWARENESS AND USAGE

When consumers think of sweeteners, they think of sugar and/or honey

Sweetener Awareness

(When you think about what you use to sweeten your food and beverages, what sweeteners come to mind?) Showing 3% or higher



Sugar and honey lead in total unaided awareness with 27% thinking about both sugar and honey when asked about sweeteners. Natural and artificial non-caloric sweeteners follow. Natural Nourishers are more likely to think of honey and less likely to think of sugar compared to the general population. In addition, Natural Nourishers are more likely to mention a range of sweeteners that are less top of mind overall.

Keeping honey top of mind can help grow its share of the consideration set and of the category as a whole.

Base: Total (n=2,469), Natural Nourishers (n=475).

Honey and sugar are favorites among consumers

Favorite Sweetener

(And of these sweeteners, which is your favorite? Top 10)

Sweetener	Total	Natural Nourishers	Natural Nourishers vs. Total	Total 2024 vs. 2023	Over-indexing vs. Total
Granulated or white sugar	28%	19%	-8 pts	0 pts	
Honey	26%	38%	+13 pts	0 pts	N
Non-calorie sweeteners	12%	9%	-3 pts	+1 pts	B
Brown sugar	9%	6%	-3 pts	0 pts	Z
Stevia	8%	5%	-2 pts	-1 pts	X
Sugar other than white or brown	6%	7%	+1 pts	-1 pts	X
Maple syrup	6%	4%	-1 pts	0 pts	
Monk fruit	2%	4%	+2 pts	0 pts	Z M N
Agave nectar	2%	4%	+2 pts	0 pts	Z M N
Coconut sugar	1%	2%	+1 pt	-1 pt	Z M N

■ Total ■ Natural Nourishers

26% of consumers say honey is their favorite sweetener

38% of Natural Nourishers

There is virtually no change in sweetener preference compared to 2023. Consumers overall express nearly equal preference for granulated/white sugar and for honey, while Natural Nourishers are twice as likely to prefer honey over granulated/white sugar. Even non-target consumers rate honey second in terms of sweetener preference.

Honey also ranks #1 among Black/African Americans (29%) and among Asian and other ethnicities (43%, 166 index) (data not shown).

Over-index at ≥120 among....

Z Gen Z M Millennials X Gen X B Boomers Households with kids N Natural Nourishers

Base: Total (n=2469), Natural Nourishers (n=475).

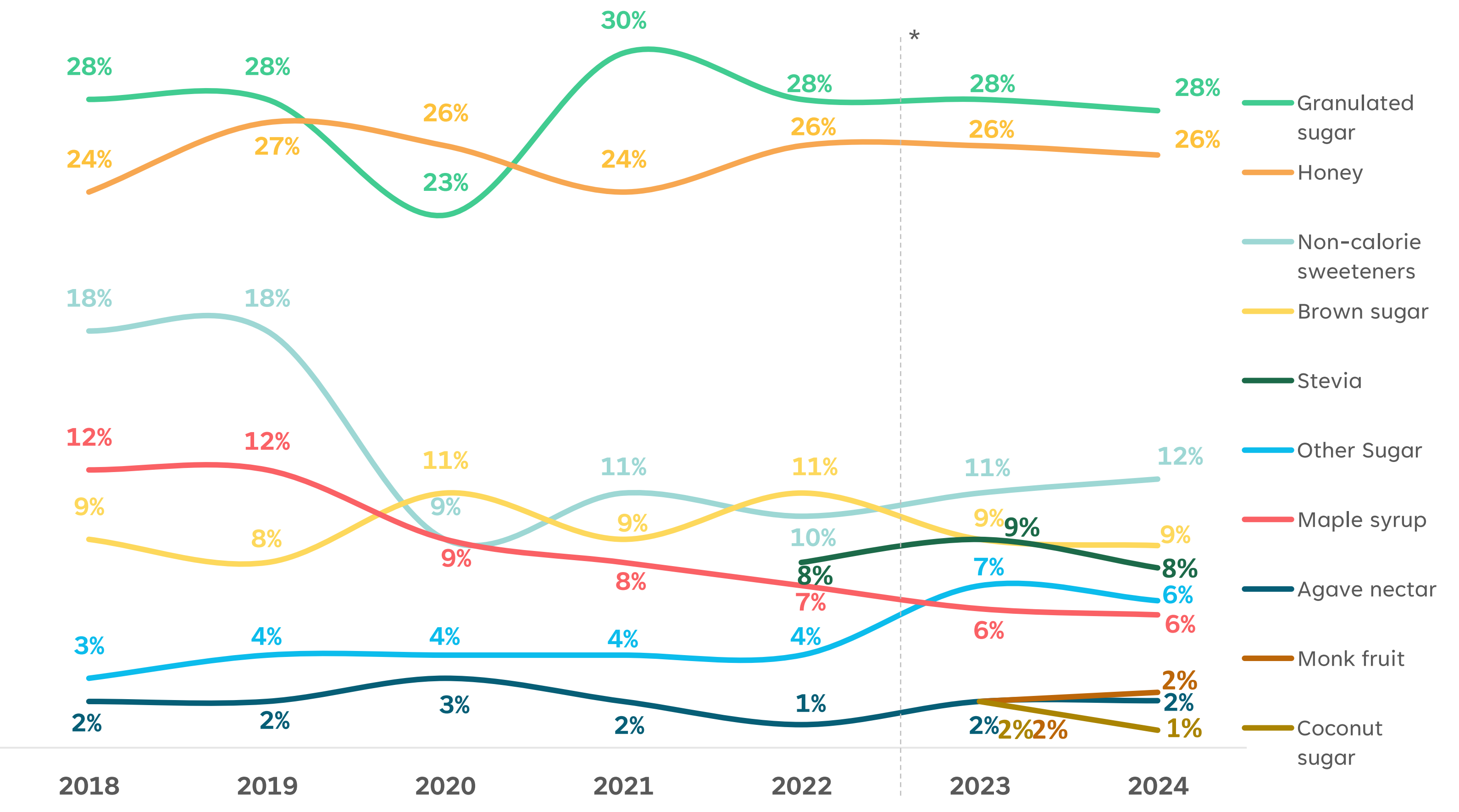
While individuals may sometimes decide on a new favorite sweetener, adults overall have tended to choose the same favorites. Honey remains the favorite for one-fourth of consumers, a close second behind sugar and well ahead of other sweeteners.

Non-caloric sweeteners remain well below their pre-2020 levels. These sweeteners are most likely to be the favorites among Boomers (17%), but less so among younger generations (10% Millennial and Gen X, 3% Gen Z). Maple syrup has lost half of its share of preference since 2018 with no signs of rebounding.

Brown sugar ranks number 3 among Gen Z, with 14% choosing brown sugar as their favorite sweetener, even as this generation has come of age with access to a wide variety of new sweetener entries. Gen Z's preferences should continue to be monitored closely.

America's preferred sweeteners have remained mostly stable over the past several years

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



Base: Total (n=2,469).

* Change in demographic weighting methodology between 2022 and 2023.

Among all POSITIVE sweetener messages received, stories and messages about honey have the highest recall

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?)

TOTAL
Same as 2023

NATURAL NOURISHERS

Natural Nourishers are more likely to have heard positive messaging about sweeteners. Their interest in learning about health and wellness, and thus the category, has likely made them receptive to positive honey stories. Besides honey, this audience has heard stories on multiple sweeteners including but not limited to Stevia, coconut sugar and monk fruit. Fewer have heard stories about granulated/white sugar.

Positive Story Sweetener Types

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

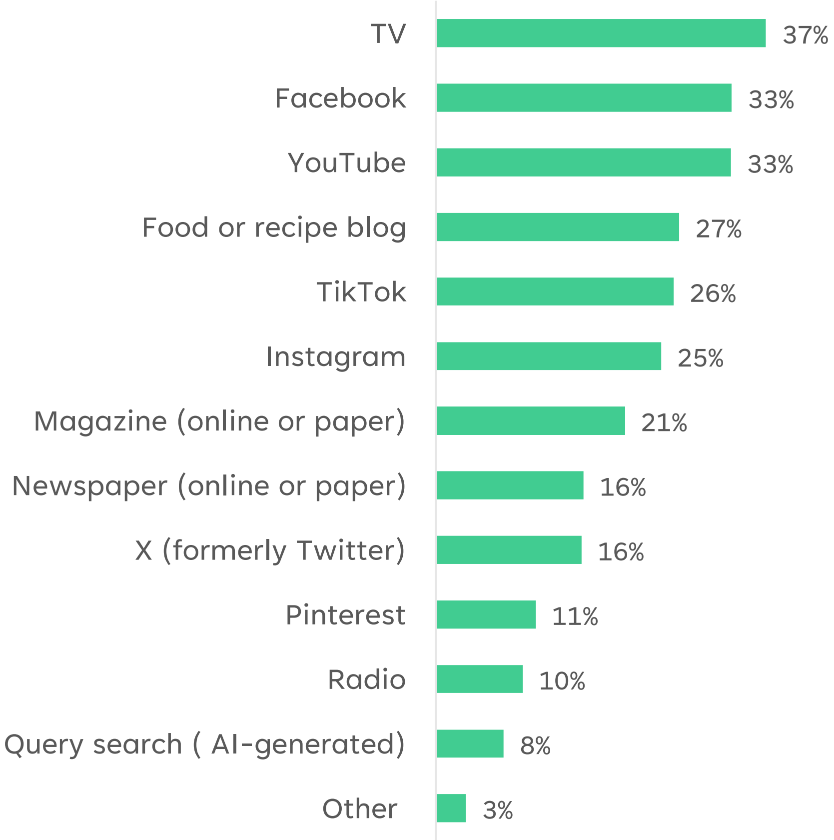
	Total	Natural Nourisher	Natural Nourishers vs. Total	Total 2024 vs. 2023
Honey	55%	61%	+7 pts	-1 pt
Stevia	28%	30%	+3 pts	-3 pts
Brown sugar	23%	24%	+1 pts	-2 pts
Maple syrup	21%	19%	-2 pts	-1 pts
Coconut sugar	20%	23%	+3 pts	0 pts
Agave nectar	20%	23%	+3 pts	+5 pts
Non-calorie sweeteners	19%	15%	-4 pts	+1 pts
Monk fruit	17%	24%	+6 pts	+4 pts
Other sugar	13%	14%	+1 pts	+4 pts
Corn Syrup	12%	13%	+1 pts	NA
Granulated/white sugar	12%	8%	-4 pts	+3 pts
Molasses	8%	8%	0 pts	NA
Allulose	6%	9%	+3 pts	-3 pts
Xylitol	5%	8%	+3 pts	0 pts
Erythritol	4%	8%	+4 pts	+1 pts
I don't recall	6%	4%	-2 pts	0 pts

 Base: Total (n=2,2469), Natural Nourisher (n=475); Recalled positive story Total (n=462), Natural Nourisher (n=145).

Television is the primary source recalled for positive honey stories, followed by Facebook and YouTube

Positive Story Source

(Where specifically do you recall reading any POSTIVE articles or hearing a POSITIVE story about HONEY from?) Among those who recalled a positive story



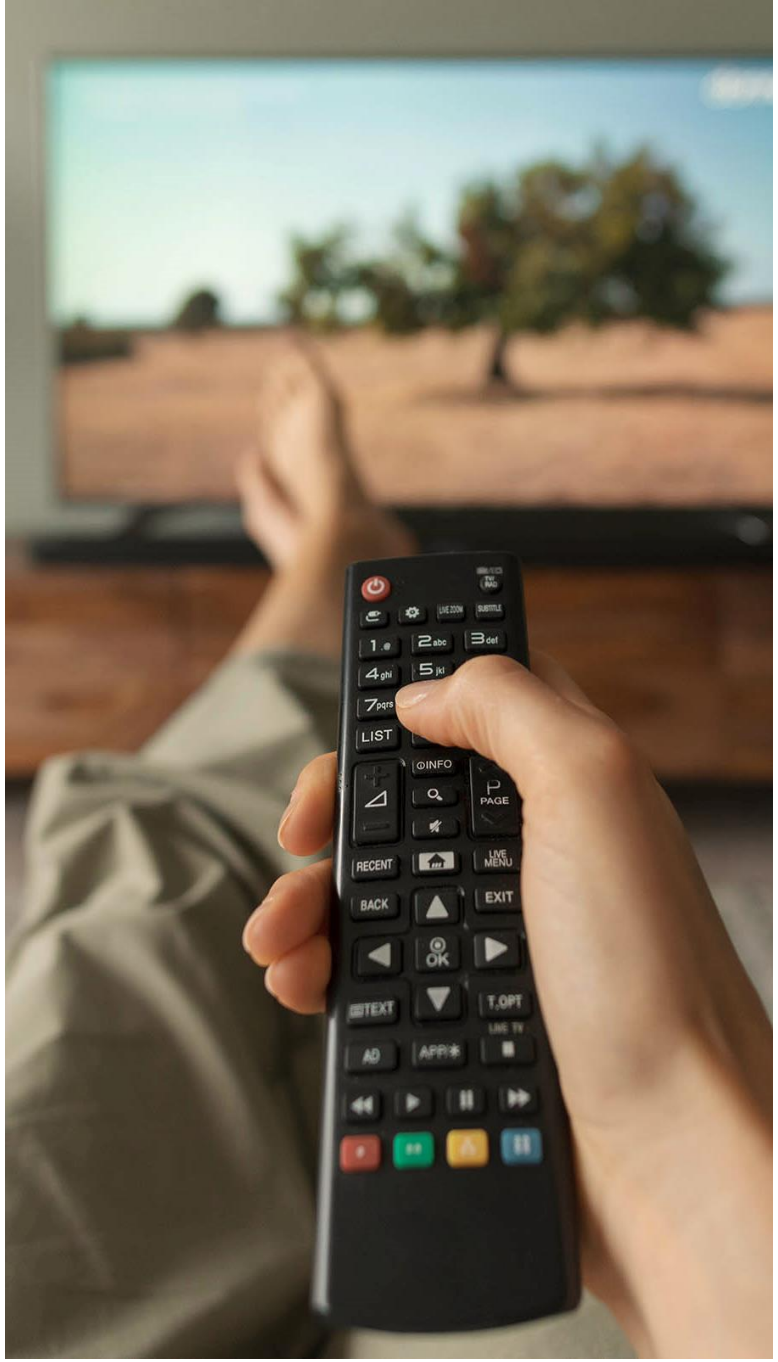
"It is rich in nutrients and antioxidants, has antibacterial "properties."
– Male, Millennial, Natural Nourisher

"The story was about honey, and that it is a natural sweetener and does not contain high fructose corn syrup."
– Female, Boomer

"Besides the nutritional value, honey is a very versatile sweetener that is natural and a very healthy alternative compared to sugar."
– Male, Millennial, Natural Nourisher

"It was an article about the health benefits of honey and also how the repopulation of bees is good for the ecosystem."
– Female, Millennial, Natural Nourisher

"That we need it for us and for the bees to survive."
– Male, Gen X, Natural Nourisher



Base: Recalled hearing a positive story Total (n=250), Natural Nourishers (n=90)*. Caution small sample n<100.

Recall of NEGATIVE stories is around non-caloric sweeteners, similar to last year

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
Same as 2023

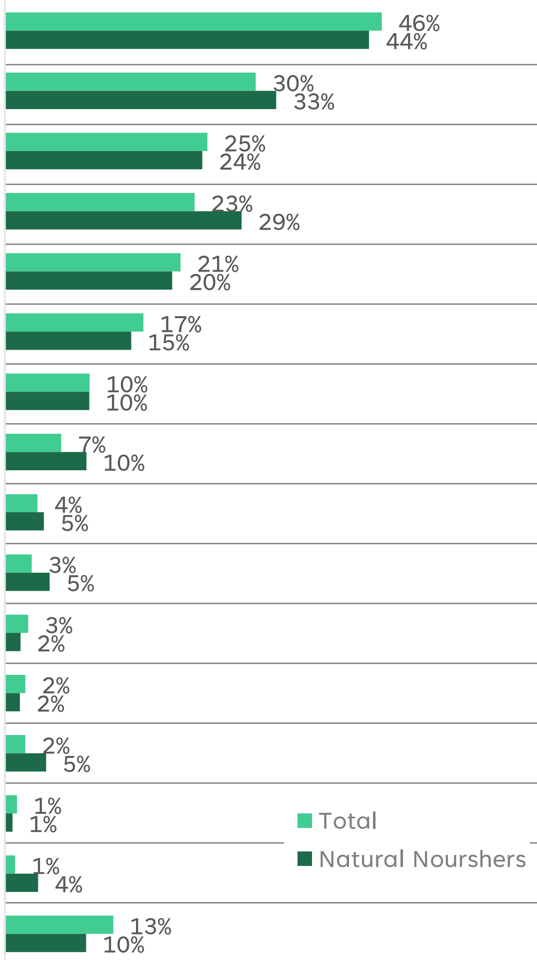
NATURAL NOURISHERS

Recall for negative stories remains consistent with 2023. Non-caloric sweeteners (46%) followed by corn syrup (30%) bear the brunt of negative recall, followed closely by granulated/white sugar (25%).

Very few consumers have heard negative stories about honey at 2%. This is down from 4% in 2023.

Negative Story Sweetener Types

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



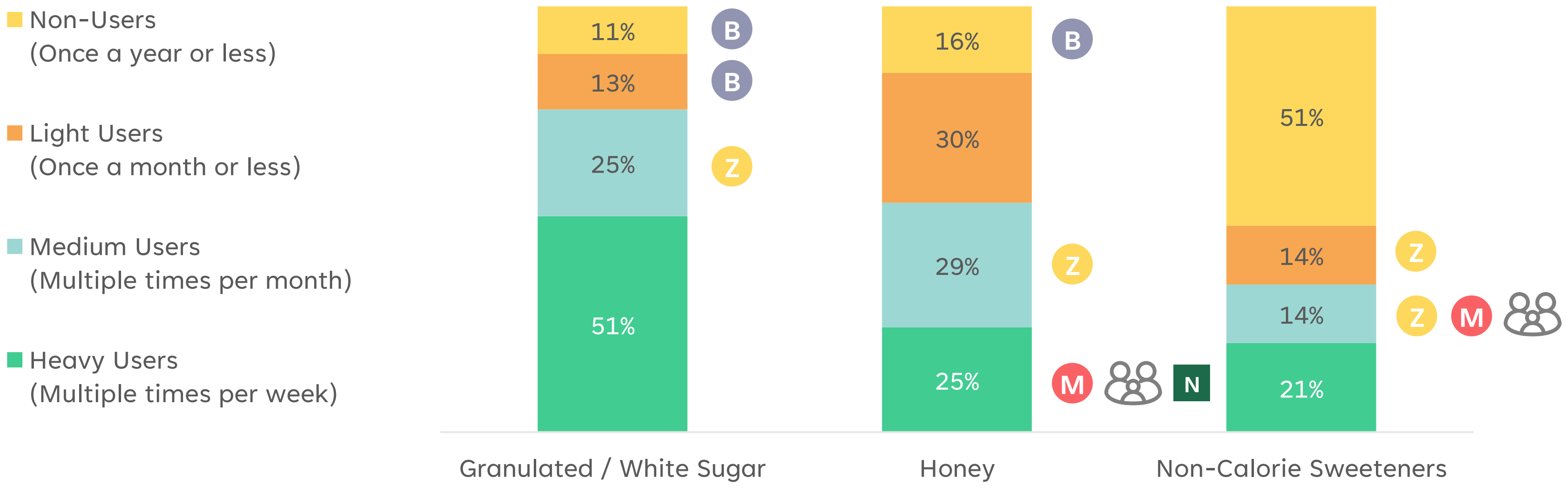
	Total	Natural Nourshers	Natural Nourishers vs. Total	Total 2024 vs. 2023
Non-calorie sweeteners	46%	44%	-2 pts	0 pts
Corn syrup	30%	33%	+3 pts	NA
Granulated/white sugar	25%	24%	-1 pts	-2 pts
Xylitol	23%	29%	+6 pts	+1 pts
Stevia	21%	20%	-1 pts	-1 pts
Erythritol	17%	15%	-1 pts	-2 pts
Allulose	10%	10%	0 pts	+3 pts
Other sugar	7%	10%	+3 pts	-3 pts
Brown sugar	4%	5%	+1 pts	-1 pts
Molasses	3%	5%	+2 pts	NA
Maple Syrup	3%	2%	-1 pts	-1 pts
Honey	2%	2%	-1 pts	-2 pts
Agave nectar	2%	5%	+3 pts	-2 pts
Coconut sugar	1%	1%	-1 pts	-2 pts
Monk fruit	1%	4%	+3 pts	-2 pts
I don't recall	13%	10%	-3 pts	0 pts

Base: Total (n=2,2469), Natural Nourishers (n=475); Recalled negative story Total (n=569), Natural Nourishers (n=138).

Despite honey being a favorite among many, honey is used less frequently than granulated sugar

Granulated sugar is more of a staple in both the kitchen and in recipes. Over half of all consumers use sugar at least once a week. While a quarter of users use honey at least once a week, most honey users are medium or light users, choosing honey multiple times a month or less. **Providing more recipes with honey and highlighting daily use occasions can help to bolster regular usage of honey.**

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



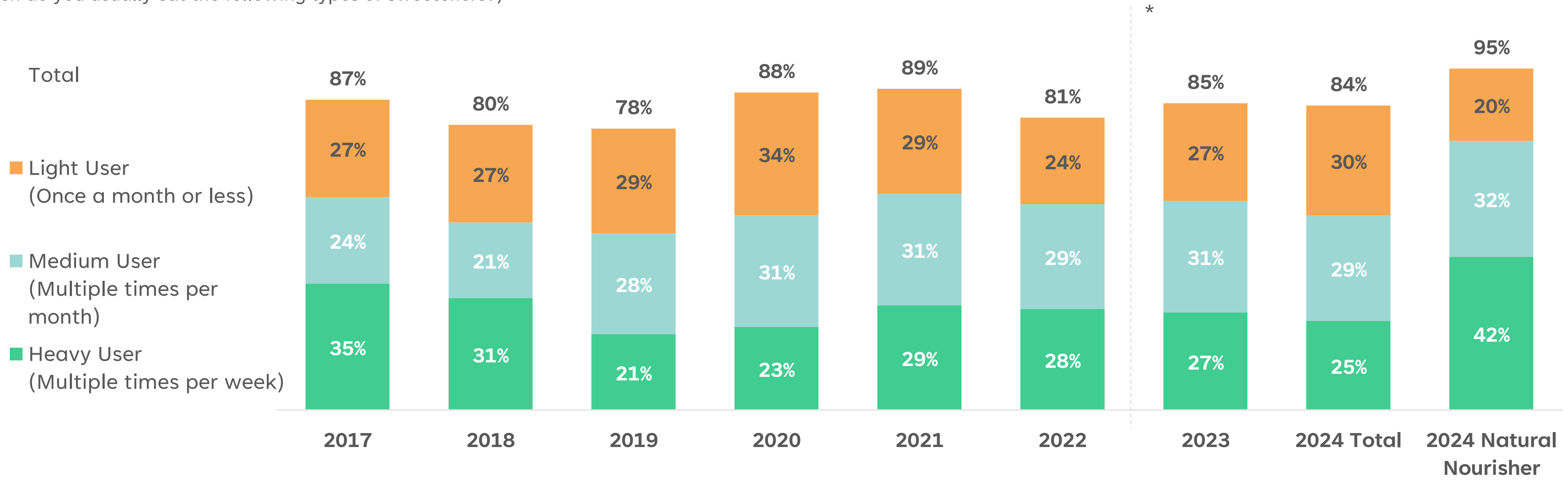
Base: Total (n=2,469), Natural Nourishers (n=475), Gen Z (n=327), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

Over-index at ≥120 among....

Z Gen Z | M Millennials | X Gen X | B Boomers | Households with kids | N Natural Nourishers

Honey reach remains stable, with a slight shift towards lighter usage

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



The shift toward lighter usage is driven by older consumers, both Gen X and Boomers. Natural Nourishers are the heaviest users with just under half being heavy users. Overall, nearly all Natural Nourishers use honey at least once a month.

Base: Total 2017 (n=~2,000), 2018 (n=2,003), 2019 (n=2,001), 2020 (n=2,000), 2021 (n=2,000), 2022 (n=2,051), 2023 (n=2,265), 2024 (n=2,469), Natural Nourishers (n=475); Gen Z (n=327), Millennial (n=725), Gen X (n=62)8, Boomer (n=789). *Change in demographic weighting.

Honey is a versatile sweetener, used across many occasions

Sweetener usage occasions

(How is each sweetener typically used in your household?) Sweeteners listed in order of "favorite"; Top 10 shown

		White Sugar	HONEY	Non-Calorie	Brown Sugar	Stevia	Other Sugar	Maple Syrup	Monk Fruit	Agave Nectar	Coconut Sugar
Meals/snacks	At breakfast	41%	52%	35%	26%	33%	35%	87%	23%	22%	18%
	At lunch	10%	15%	11%	2%	7%	8%	7%	11%	9%	10%
	At dinner	13%	14%	13%	9%	10%	10%	9%	12%	8%	8%
	With snacks	16%	30%	14%	10%	9%	18%	11%	27%	10%	15%
Drinks	In beverages like tea, coffee, or smoothies	56%	62%	77%	13%	72%	48%	12%	62%	43%	28%
	In alcoholic beverages or mixed drinks	6%	7%	3%	2%	4%	7%	4%	13%	28%	7%
Cooking/ baking	In cooking (sauces, marinades, etc.)	37%	47%	20%	44%	15%	36%	18%	38%	27%	40%
	In baked goods	70%	47%	26%	75%	24%	51%	23%	42%	26%	51%
Other	For medicinal purposes	3%	27%	2%	1%	1%	4%	3%	6%	11%	3%
	For beauty care	3%	8%	1%	2%	1%	2%	3%	6%	2%	5%
	Other	2%	2%	4%	1%	10%	8%	5%	1%	5%	11%
	AVG. NUMBER OF USES	**2.6**	**3.1**	2.1	1.8	1.9	**2.3**	1.8	**2.4**	1.9	1.9

Top Use (%) by Occasion/Row | #2 Use by Occasion/Row

Honey continues to be associated with "typical uses" across multiple occasions, ranking number one for six of the ten occasions measured. For most occasions, honey usage has remained stable year over year. Dinner is the exception with honey down 3 percentage points vs. 2023.

Other sweeteners are seeing shifts in usage as well. Other sugar follows the same path as honey with fewer using it at dinner. At breakfast, more consumers are using Stevia, while fewer are using monk fruit. In baking, brown sugar now leads white sugar; however, fewer are using brown sugar in cooking.

Continuing to provide recipes and communicating how honey can be used as a "hack" or replacement for other sweeteners provides opportunity for honey growth.

Base: White Sugar (n=346), Honey (n=2,244), Non-calorie (n=224), Brown Sugar (n=359), Stevia (n=188), Other Sugar (n=249), Maple Syrup (n=317), Monk Fruit (n=118), Agave Nectar (n=152), Coconut Sugar (n=117).

Breakfast is the most commonly cited usage occasion across all sweeteners

Sweeteners used with Meals
(How is each sweetener typically used in your household?) Sweeteners listed in order of "favorite"

	BREAKFAST	LUNCH	DINNER
White sugar	41%	10%	13%
Honey	52%	15%	14%
Non-calorie	35%	11%	13%
Brown sugar	26%	2%	9%
Stevia	33%	7%	10%
Other sugar	35%	8%	10%
Maple syrup	87%	7%	9%
Monk fruit	23%	11%	12%
Agave nectar	22%	9%	8%
Coconut sugar	18%	10%	8%
Honey use among Natural Nourishers	63%	23%	22%

Along with other sweeteners, honey is more commonly used at breakfast than at other meals. In fact, consumers are at least twice as likely to use sweeteners at breakfast than at other meal occasions. Honey usage is more prevalent at all meals among Natural Nourishers than among honey users overall, with relatively higher advantages at lunch and dinner.

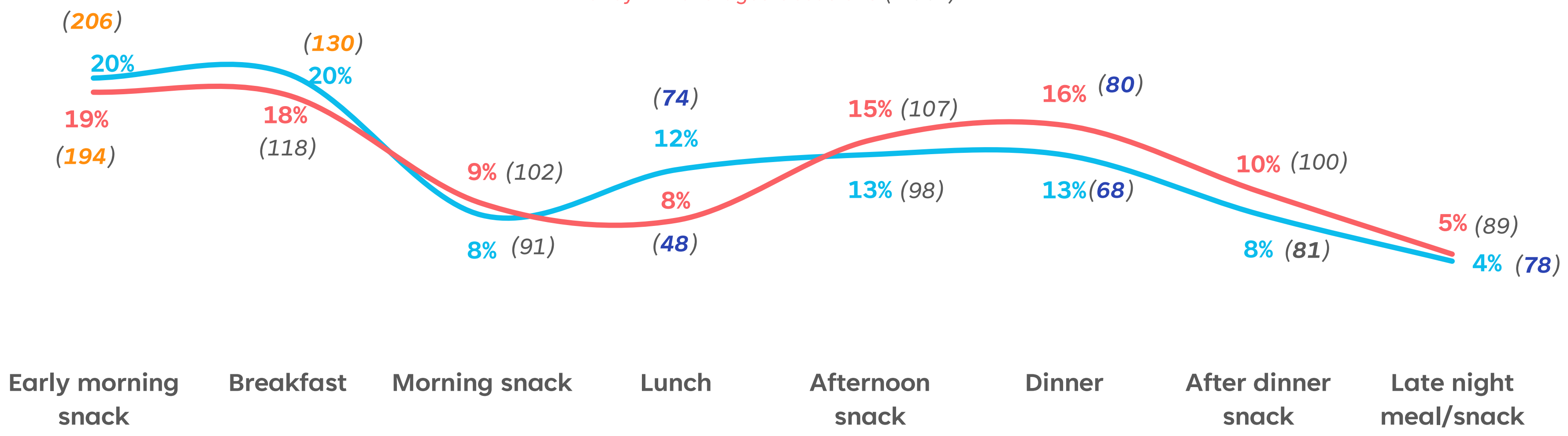
Base: White Sugar (n=346), Honey (n=2,244), Non-calorie (n=224), Brown Sugar (n=359), Stevia (n=188), Other Sugar (n=249), Maple Syrup (n=317), Monk Fruit (n=118), Agave Nectar (n=152), Coconut Sugar (n=117); Natural Nourisher Honey (n=457).

While honey is used throughout the day, usage decreases in the evening

Share Of Honey Occasions Throughout The Day

Honey in Food Occasions (Including food preparation* *(Index)*

Honey in Beverages Occasions *(Index)*



Honey At Snacks

54%

of Honey in Food occasions take place during SNACKS *(112 Index)*

58%

of Honey in Beverage occasions take place during SNACKS *(120 Index)*

While consumers associate the "typical" use of honey most strongly with breakfast, a measurement of honey's actual presence across all food and beverage occasions via past-24-hour recall suggests honey is also used later in the day. While usage in food is highest during early morning snack and breakfast, half of 'honey-in-food' occasions take place at midday or later. Use in beverages is a bit more evenly distributed, with 'honey-in-beverages' at dinner and afternoon snacks lagging only slightly behind inclusion in beverages at early morning snack and breakfast.

Source: The Hartman Group's Eating Occasions Compass Database 2022-23, adults 18-76. Base: Total Occasions (n=28,574); Honey Added to Food Occasions (n=513), Honey Added to Beverages Occasions (n=551). Indexed to Total Food & Beverage Occasions. Indices ≥ 120 are highlighted **orange**, indices ≤ 80 are highlighted **blue**.
*food preparation added in 2023

Are there distinctive patterns to the ways in which shoppers say they typically use honey? Which applications tend to go together?

Analysis last year revealed 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 (such as lunch and baking) and has been the strongest driver of usage frequency overall. Its relative decline during the past three years has been compensated by gains elsewhere, especially for Stir-In and Elixir uses. This suggests that **reinforcing honey's role in food at breakfast**, while already a strength, **could pay dividends for building overall usage moving forward.**

An array of different uses for honey underpin honey's stable frequency of usage overall

How Different Shoppers Use Honey*

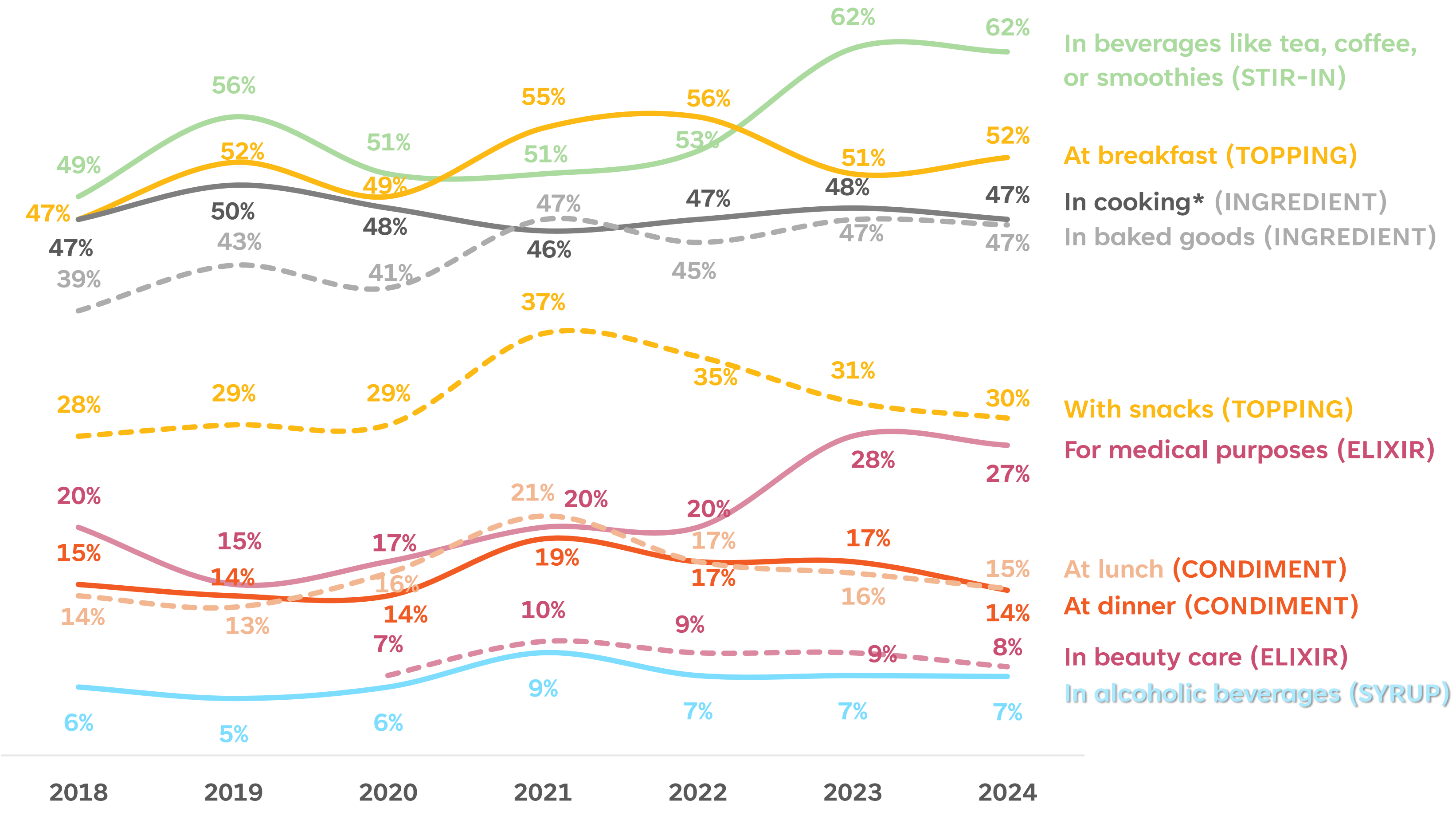
("Typical" uses which tend to be cited in tandem; in order of correlation of factor score with usage frequency)

Approach	Specific Uses	Impact on Usage Frequency	Past-3-Year Trend
Topping	With snacks At breakfast *+At lunch; +In baked goods; +At dinner*	⬆⬆⬆ Highest (.26)	⬇
Elixir	Used for beauty care Used for medicinal purposes *+In alcoholic beverages*	⬆⬆ High (.20)	⬆
Condiment	At dinner At lunch *+With snacks*	⬆ Moderate (.18)	⬇
Stir-In	In beverages like tea, coffee, smoothies *+In alcoholic beverages or mixed drinks*	⬆ Moderate (.17)	⬆
Syrup	In alcoholic beverages or mixed drinks	Low (.11)	=
Ingredient	In cooking (sauces, marinades) In baked goods *+At dinner*	Lowest (.09)	=

* Based on 2023 data using principal-axis dimensional analysis, Varimax rotation. "+*[use]*" reflects another use with more moderate association with each central approach, signifying a secondary connection. Alcoholic beverage, while not a distinct factor, shows moderate association with 4 of the 5 identified factors, suggesting its independence.

Honey usage in beverages has gained and held traction

Usage of Honey at Occasions over Time
(How is each sweetener typically used in your household?)



In 2023, usage of honey in beverages surpassed usage at breakfast, and this trend has held, along with the growth of use for medicinal purposes.

Use as a topping (at breakfast or snack) or as a condiment (at lunch or dinner) has ebbed and flowed in tandem over the past several years, suggesting that the view of honey as something added on top (vs. mixed in as in baking or cooking) is connected across these different occasions. This offers an opportunity to convert honey as a topping to honey as an ingredient for selected different occasions.

Base: Total (n=2,244).

*Before 2023, phrased as "In a recipe."

Sweeteners are chosen for convenience, flavor and value

Top 20 Most Important Sweetener Attributes
(How important is each to you when deciding what specific sweetener to choose?)
Showing Extremely + Very Important

Attribute	Total	Natural Nourishers	Total 2024 vs. 2023	Over-indexing vs. Total
Convenient/easy to use	75%	83%	+1 pts	
Flavorful	71%	79%	-2 pts	
Easy to use in cooking and baking	71%	83%	NA	
A good value	71%	82%	0 pts	
No aftertaste	67%	72%	+1 pts	
Something everyone would enjoy	62%	76%	0 pts	N
Familiar	60%	71%	-1 pts	
Fits with your lifestyle	59%	75%	-2 pts	N
Good for my digestive health	57%	78%	+1 pts	N
Healthy	57%	78%	-2 pts	N
Something you had on hand	56%	66%	-2 pts	
No strong flavor, just sweet	56%	65%	-2 pts	
Good at breakfast	55%	69%	+1 pts	N
Natural	54%	82%	-2 pts	N
Versatile	54%	73%	-2 pts	N
Contains no added ingredients*	53%	79%	-4 pts	N
Good for my immune system	50%	74%	0 pts	N
Comforting	49%	66%	+2 pts	N
Natural source of antioxidants**	48%	71%	+1 pts	N
Has a "clean" ingredient label	46%	72%	-2 pts	N

Consumers want sweeteners that are easy to use, flavorful and offer good value. They do *not* want sweeteners to have an aftertaste. This is fairly consistent compared to 2023.

The Natural Nourisher not only prioritizes convenience and value, but also looks for sweeteners that are both natural and healthy and are good for digestion and immunity.

* Contains no added ingredients/is a single ingredient
** Natural source of antioxidants, vitamins and minerals

Base: Total (n=2,469), Natural Nourishers (n=475), Gen Z (n=327), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

Over-index at ≥120 among....
Z Gen Z · M Millennials · X Gen X · B Boomers · Households with kids · N Natural Nourishers

Honey delivers well across all attributes measured, leading with being natural, flavorful and familiar. Second tier attributes include convenience and sourcing, where eight-in-ten see honey as a strong performer.

The perception of honey as healthy has increased significantly vs. 2023 as consumers turn to honey as a healthier alternative to sugar. Conversely, the perception of honey having a “clean” ingredient label is down. Marketing to purity aspects of honey can help boost this perception.

Honey associations are similar across age cohorts and households with or without kids. Natural Nourishers tend to evaluate honey even more positively, especially in terms of its healthful qualities (immunity, digestion, antioxidants) and ease of use and enjoyment.

Among the most important sweetener attributes, honey rates highly on being natural and flavorful

Top 20 Honey Attributes
(Please rate how well honey delivers on the following attributes.)
Showing Excellent + Good

		Natural Nourishers	Natural Nourisher to total	Total 2024 vs. 2023
Natural	90%	93%	+3 pts	0 pts
Flavorful	87%	92%	+5 pts	0 pts
Familiar	86%	92%	+5 pts	-1 pts
Contains no added ingredients	84%	91%	+7 pts	0 pts
Healthy	83%	92%	+10 pts	+3 pts
Easy to keep on hand	82%	92%	+10 pts	+2pts*
Good at breakfast	81%	89%	+8 pts	-1 pts
Convenient/easy to use	81%	90%	+8 pts	0 pts
US sourced/produced	81%	87%	+7 pts	-1 pts
Good for my immune system	80%	89%	+10 pts	0 pts
Locally sourced/produced	78%	89%	+10 pts	-1 pts
Unprocessed	78%	87%	+9 pts	+2 pts
Has a "clean" ingredient label	77%	86%	+9 pts	-3 pts
Good for my digestive health	77%	89%	+12 pts	0 pts
Comforting	77%	84%	+8 pts	0 pts
Easy to use in cooking and baking	76%	88%	+12 pts	NA
Something everyone would enjoy	76%	89%	+12 pts	0 pts
Versatile	76%	86%	+10 pts	+1 pts
Good source of antioxidants	76%	88%	+12 pts	+2 pts
Sustainably produced	75%	87%	+12 pts	-2 pts

* Compared to: Something you had on hand

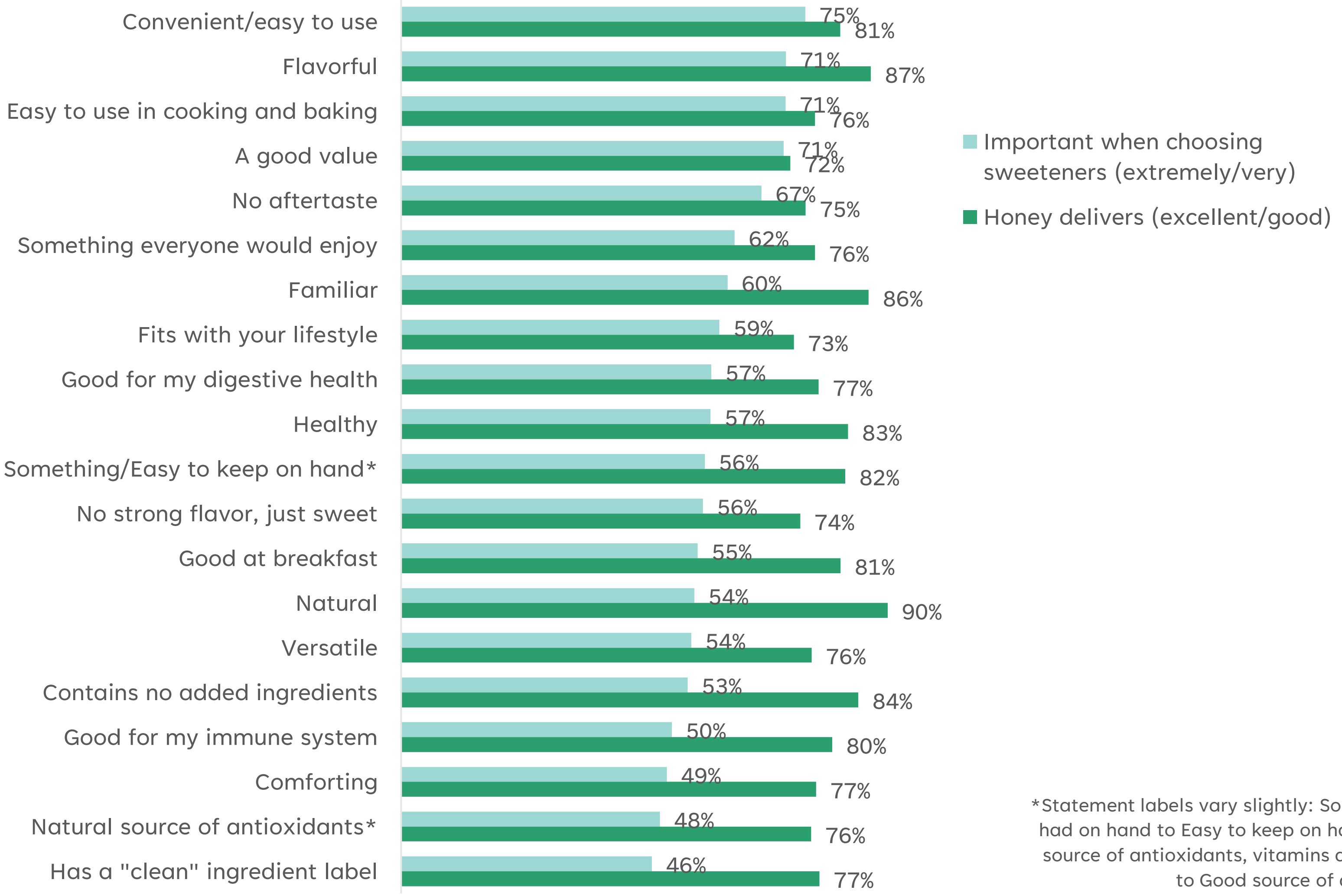
Over-index at ≥120 among....

Z Gen Z   M Millennials   X Gen X   B Boomers   Households with kids   N Natural Nourishers

Base: Total (n=2,469), Natural Nourisher (n=475).

Honey delivers across purchase drivers

Honey Performance against Top 20 Sweetener Purchase Drivers - Total
(How important is each to you when deciding what specific sweetener to choose? Rate how well honey delivers on the following attributes.)



*Statement labels vary slightly: Something you had on hand to Easy to keep on hand; Natural source of antioxidants, vitamins and minerals to Good source of antioxidants

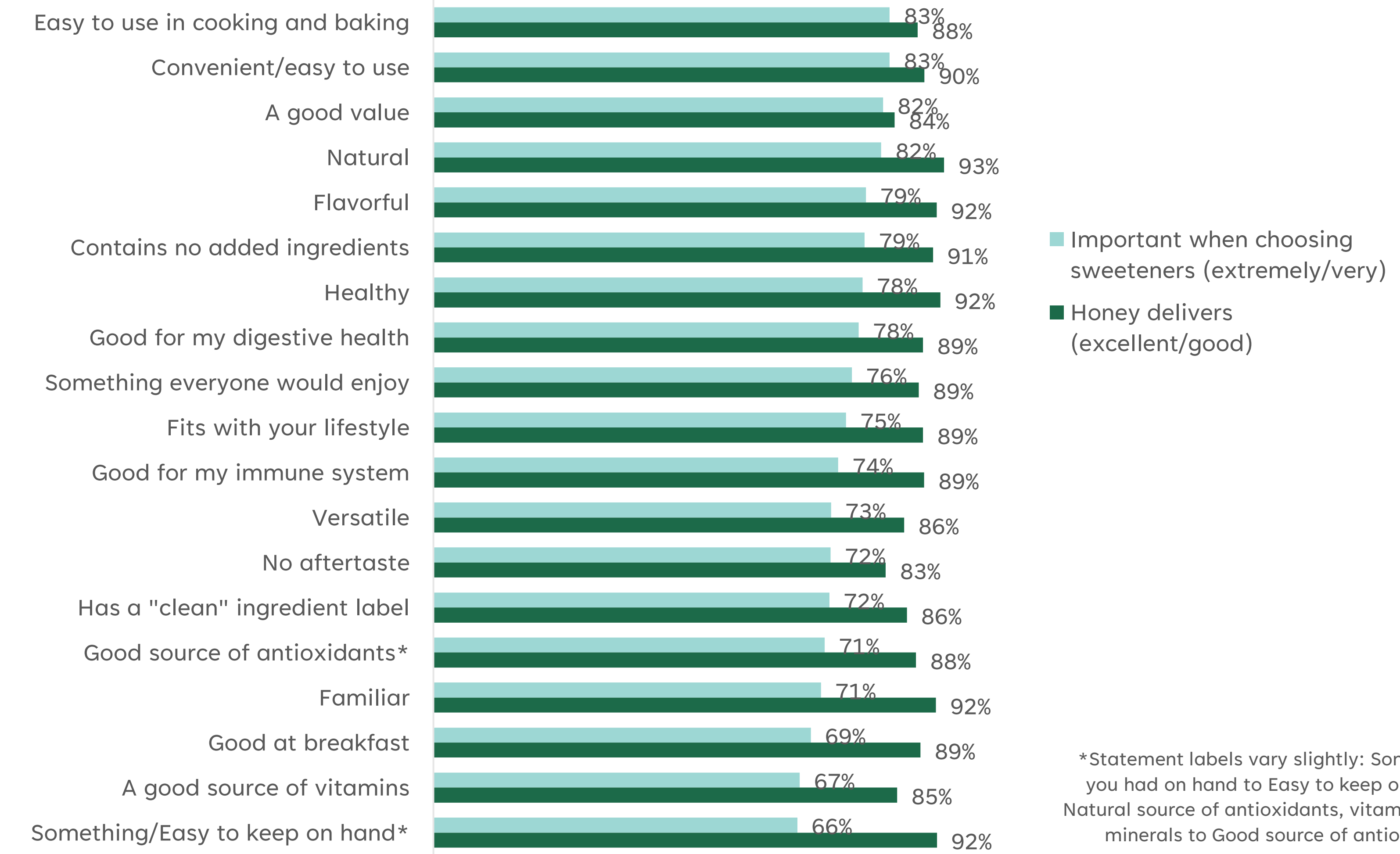
Honey rates strongly on all attributes compared to what consumers look for in their sweeteners. In fact, on all 20 most important sweetener attributes a higher number of consumers rate honey as being excellent or good than say that attribute is extremely or very important.

The two areas where this margin of performance over importance is slim are ease of use in cooking and baking, and good value. While honey is still seen as performing strongly on these attributes by about three-quarters of consumers, they are among the weakest performing for honey. Shoring up perceptions of ease of use and value could therefore help grow usage.

Among Natural Nourishers, convenience, value and natural are most important

Honey Performance against Top 20 Sweetener Purchase Drivers – Natural Nourishers

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



*Statement labels vary slightly: Something you had on hand to Easy to keep on hand; Natural source of antioxidants, vitamins and minerals to Good source of antioxidants

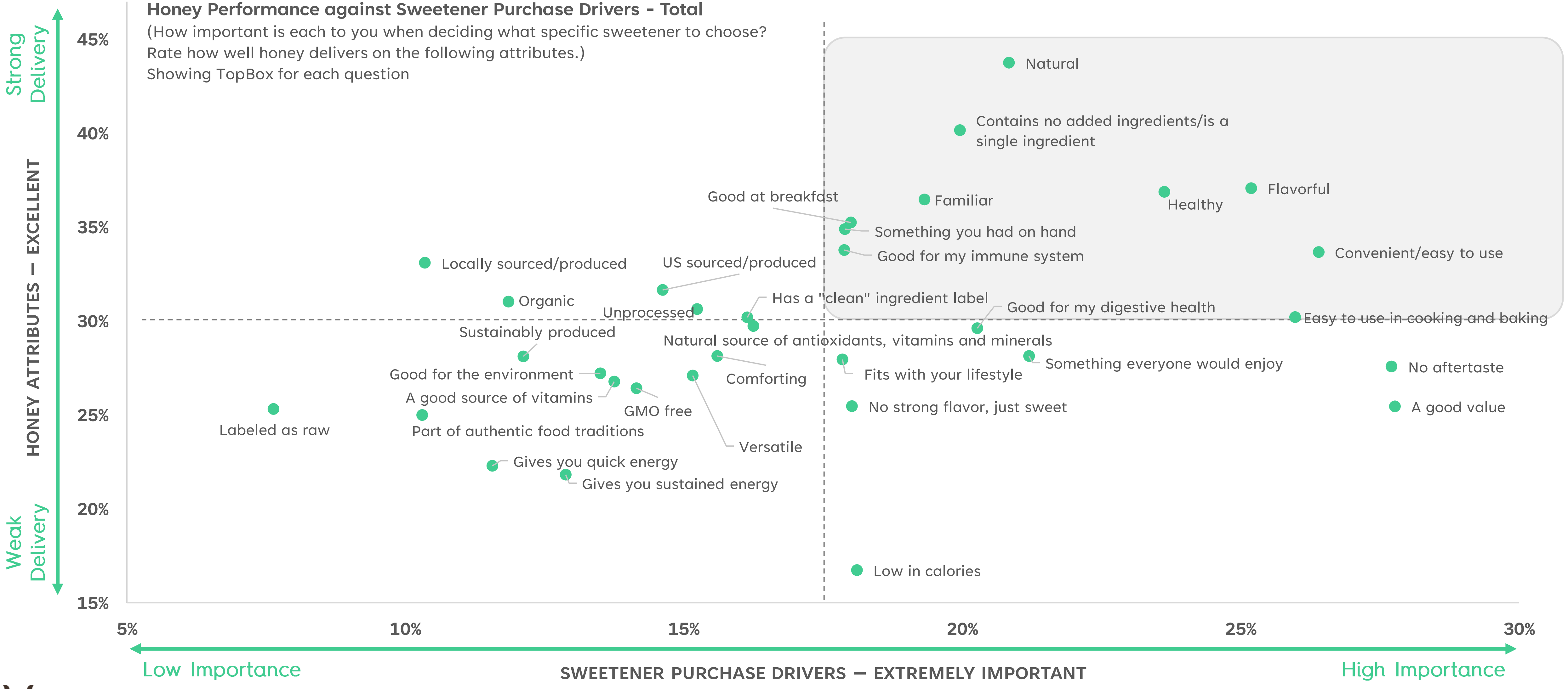
Natural Nourishers have higher expectations of their sweeteners and even more positive views of honey's performance than the general population. Close to nine out of ten Natural Nourishers rate honey as excellent or good across all 20 most important sweetener attributes.

The margin is again slimmest on ease of use and good value, offering an opportunity to focus on these areas to increase honey usage among Natural Nourishers as well.

Honey delivers best on being natural, a single ingredient, healthy, familiar and flavorful

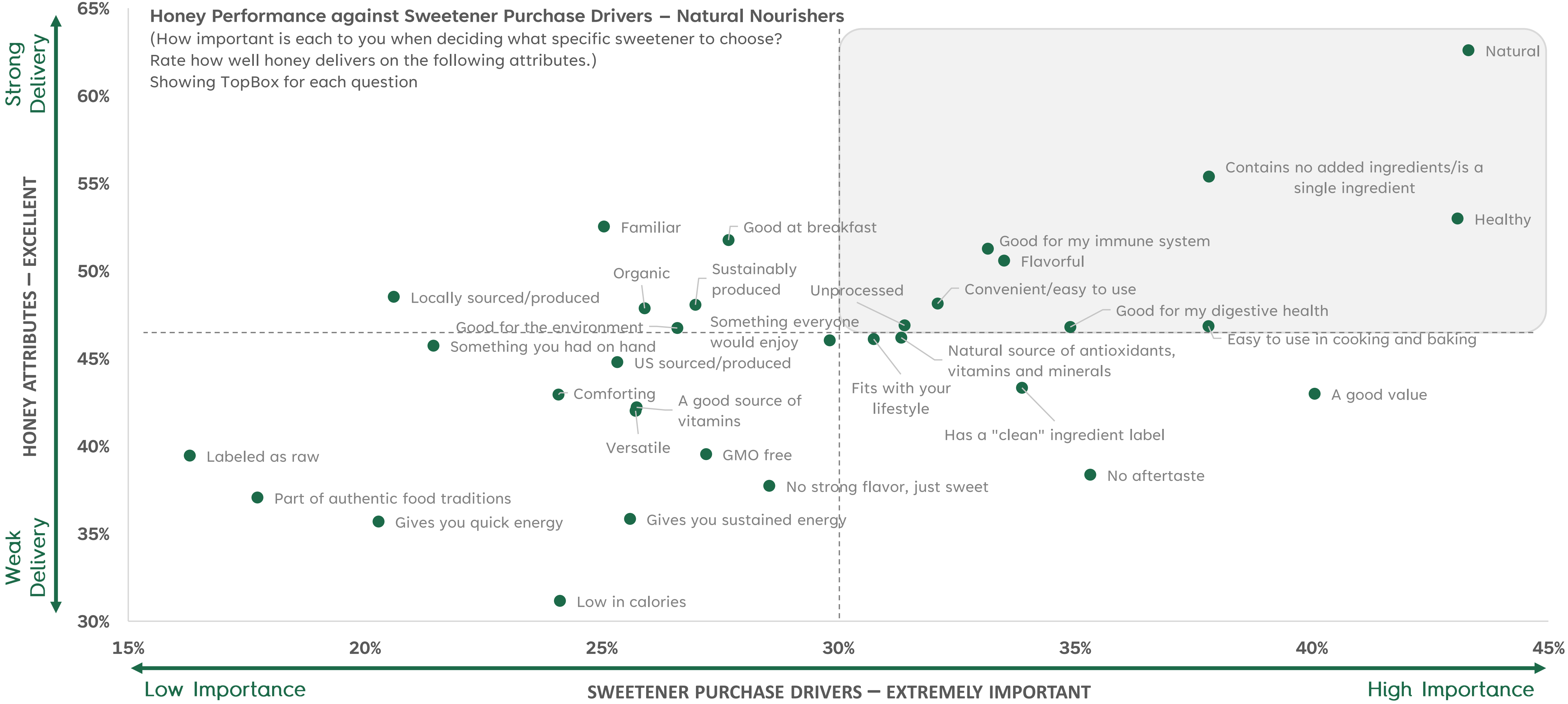
Honey Performance against Sweetener Purchase Drivers - Total

(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



*Statement labels vary slightly: Something you had on hand to Easy to keep on hand; Natural source of antioxidants, vitamins and minerals to Good source of antioxidants

Natural Nourishers place less importance on a sweetener's familiarity and more importance on benefits for immunity



Base: Natural Nourishers (n=475).

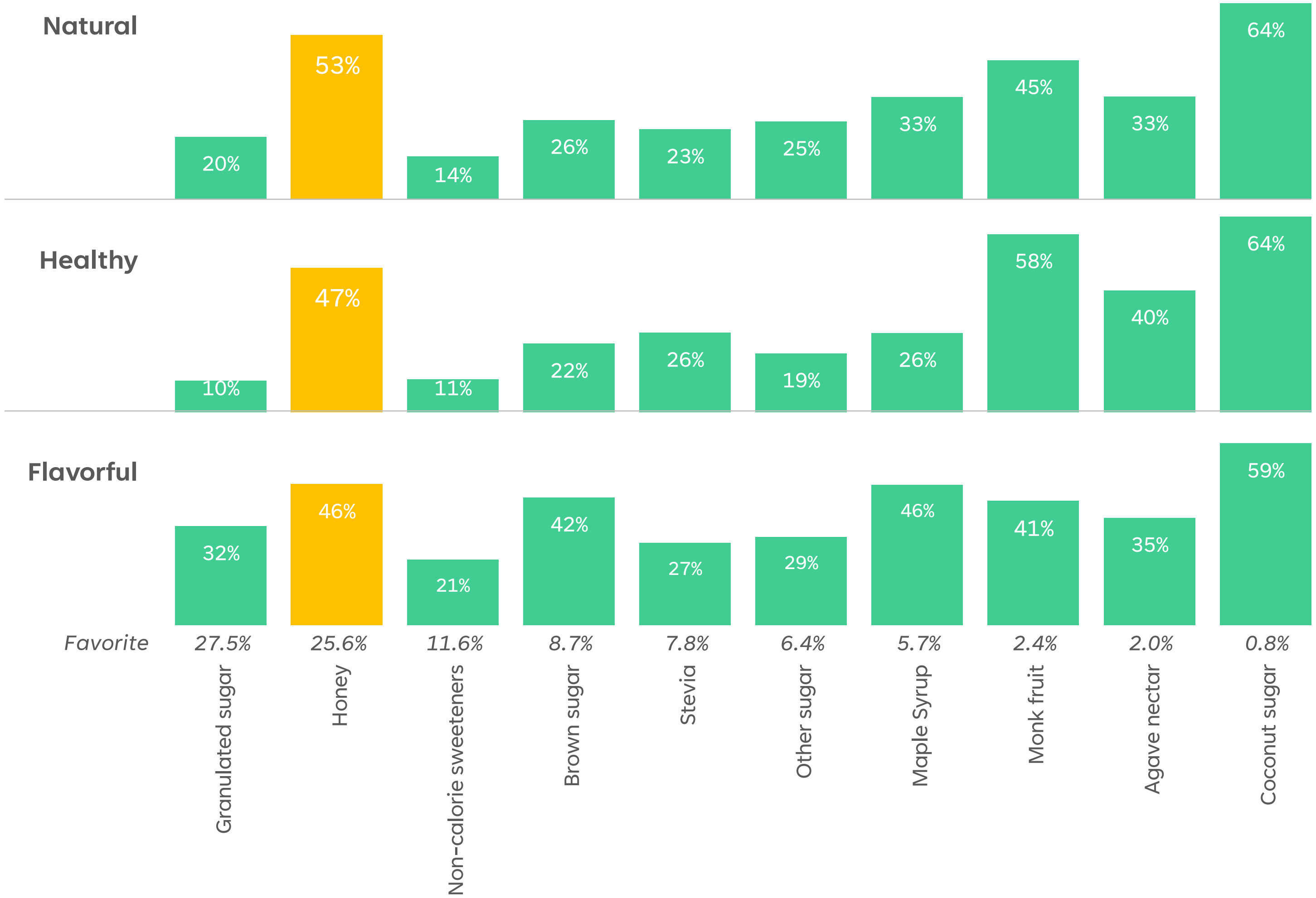
Note: Vegan is not showing as importance is less than 15%

*Statement labels vary slightly: Something you had on hand to Easy to keep on hand; Natural source of antioxidants, vitamins and minerals to Good source of antioxidants

Those who prefer coconut sugar or monk fruit see similar strengths as those whose favorite is honey

Sweetener Perceptions Among Those Who Favor Each

(Rate how well 'sweetener' delivers on the following attributes. % rating "Excellent" for each attribute.)



Half (53%) of those who name honey as their favorite sweetener say that it is "excellent" at delivering on natural benefits, and almost as many (47%) say it excels at being healthy. Even when shoppers favor other sweeteners, they typically don't rate those sweeteners as highly.

Where other sweeteners start to encroach on honey's sweet spot is in the realm of flavor. Flavor ranks number 2 in terms of importance, just after convenience, as a factor in why consumers choose a specific sweetener. While taste is personal, the more situations where the flavor of honey can be promoted, the more consumers will think about and choose the sweetener.

Base: White Sugar (n=685), Honey (n=640), Non-calorie (n=265), Brown Sugar (n=219), Stevia (n=186), Other Sugar (n=164), Maple Syrup (n=136), Monk Fruit (n=61*), Agave Nectar (n=50*), Coconut Sugar (n=22*). *Caution small sample <100.

Honey competes among sweeteners with different strengths and liabilities; white and brown sugar win favoritism through strong alignment with cooking

Sweetener Perceptions Among Those Who Favor Each

(Rate how well 'sweetener' delivers on the following attributes. Highest % rating "Poor" per attribute/column noted as **WORST** (●), top-3 %'s rating "Excellent" noted as **BEST** (▲).)

	Healthy	Low in calories	Good source of antioxidants	Natural	Unprocessed	Versatile	Easy to keep on hand	Flavorful	No strong flavor, just sweet	Good at breakfast	Easy to use in cooking and baking	Sustainably produced
Granulated sugar	●	●				▲			▲		▲	
Honey	▲		▲	▲	▲	▲		▲		▲		▲
Non-calorie sweeteners		▲	●	●	●				●		●	●
Brown sugar											▲	
Stevia		▲								●		
Other sugar								●				
Maple Syrup					▲	●	▲	▲	▲	▲		
Monk fruit	▲	▲	▲	▲	▲	▲	▲					▲
Agave nectar							●					
Coconut sugar	▲		▲	▲			▲	▲	▲	▲	▲	▲

Against the landscape of competing sweeteners, honey has few real liabilities. While it isn't a clear winner on being low in calories, it also escapes being villainized for calories or poor health as granulated sugar is (even among those who favor sugar!). Honey's many strengths align especially well in areas where non-calorie sweeteners fall short: nutrition and naturality. Coconut sugar appears to hit many of the same positive notes as honey, getting high ratings from its fans for nutrition, natural, convenience, flavor, sustainability and alignment with breakfast needs.

Base: White Sugar (n=685), Honey (n=640), Non-calorie (n=265), Brown Sugar (n=219), Stevia (n=186), Other Sugar (n=164), Maple Syrup (n=136), Monk Fruit (n=61*), Agave Nectar (n=50*), Coconut Sugar (n=22*).
*Caution small sample <100.

Users would recommend honey for being especially natural, healthy and flavorful

In line with overall perceptions of how honey is evaluated, natural, healthy and flavorful rise to the top as reasons why someone would recommend honey to replace another sweetener.

While being organic, having a “clean” label and being a good source of vitamins are the only attributes where Natural Nourishers over-index vs. Total in the top 20, Natural Nourishers rate honey higher on a number of attributes.

Top 20 Honey Advantages

(If you were recommending HONEY to replace another sweetener, what advantages would you say honey has over other sweeteners?)

	Total	Natural Nourishers	Natural Nourishers vs. Total	Over-indexing vs. Total
Natural	57%	64%	+7 pts	
Healthy	50%	58%	+8 pts	
Flavorful	41%	41%	+1 pts	
Good for my immune system	37%	41%	+4 pts	
Contains no added ingredients	35%	39%	+4 pts	
Easy to keep on hand	34%	35%	0 pts	
Unprocessed	32%	35%	+3 pts	
Organic	31%	40%	+9 pts	Z N
Good at breakfast	31%	33%	+2 pts	Z
Good for my digestive health	30%	33%	+3 pts	
Convenient/easy to use	30%	35%	+4 pts	
Good source of antioxidants	30%	35%	+4 pts	
Locally sourced/produced	30%	31%	+1 pts	
Has a "clean" ingredient label	28%	34%	+6 pts	N
Familiar	28%	29%	0 pts	
Comforting	27%	32%	+4 pts	
Easy to use in cooking and baking	27%	30%	+3 pts	
A good source of vitamins	25%	33%	+8 pts	N
No strong flavor, just sweet	25%	26%	+1 pts	
No aftertaste	24%	22%	-3 pts	B

Over-index at ≥120 among....

Z Gen Z · M Millennials · X Gen X · B Boomers · Households with kids · N Natural Nourishers

Base: Total (n=2,469), Natural Nourishers (n=475), Gen Z (n=327), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

Nutritional and natural are the top motivators for increased honey consumption

While a range of honey qualities work to motivate higher honey consumption, its nutritional and natural benefits rise to the top among these, in line with overall perceptions of honey. Natural Nourishers are defined by the importance they place on these top honey attributes, but these appeal to the broader public as well.

Motivation to Eat More Honey

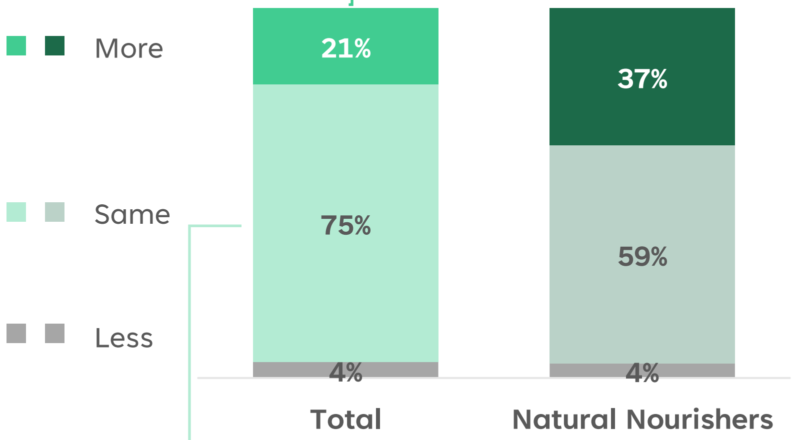
(Assuming all of the statements listed below are true about honey, how relevant to you are each of these as a reason to eat honey more often?)
Showing Great + Very good reason

	Total	Natural Nourisher	Total 2024 vs. 2023
Research has shown that honey contains a wide array of vitamins, minerals, amino acids, and antioxidants	73%	81%	-2 pts
Honey is an all-natural and unprocessed sweetener	73%	82%	+1 pts
Honey is a natural source of antioxidants, which helps with inflammation and maintaining healthy cells	73%	82%	-1 pts
Bees pollinate 1/3 of our food. Honey helps keep bees alive	71%	78%	-4 pts
Honey is a natural sweetener that requires less processing than other sweeteners	71%	81%	0 pts
Honey is a source of naturally occurring prebiotics that can aid in gut health	71%	80%	-1 pts
Eating honey helps keeps bees alive to pollinate our food supply	71%	77%	-1 pts
Eating honey directly supports beekeepers and beekeepers directly support healthy bees	69%	78%	-1 pts
Honey is better for me than other sweeteners	68%	80%	-2 pts
Honey is an effective cough suppressant	65%	77%	-4 pts
Eating honey helps support the environment	63%	75%	-3 pts
Honey is up to 50% sweeter than other sugars so you can use less to get the same sweetness	63%	75%	-1 pts

Base: Total (n=2,469), Natural Nourisher (n=475).

While most plan to keep honey consumption the same as last year, over a third of Natural Nourishers plan to consume 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?)



The majority of consumers plan to consume a similar amount of honey as last year, citing no real incentive or reason to change.

Among those planning on increasing consumption, health and natural are supporting reasons. Some note honey is a 'healthier' alternative to sugar, while others note specific health benefits. These appeal strongly to consumers who have the aspiration to eat better. Communicating this connection could give consumers reason to increase usage.

Reasons for eating more

"I plan on eating more honey in the next year because it's healthy for my system."
– Male Gen X, Natural Nourisher

"Just a more natural product to cook with."
– Male, Millennial, Natural Nourisher

"It's a healthier option compared to sugar."
– Female, Millennial, Natural Nourisher

"It is so yummy and healthy. So many health benefits. It's versatile and easy to add to anything."
– Female, Gen Z

Reasons for eating the same

"My routine in cooking will remain the same."
– Female, Boomer

"Using familiar recipes."
– Female, Boomer

"No reason to change."
– Male, Gen Z

"I don't feel that I need to eat any more or less of honey."
– Female, Gen Z

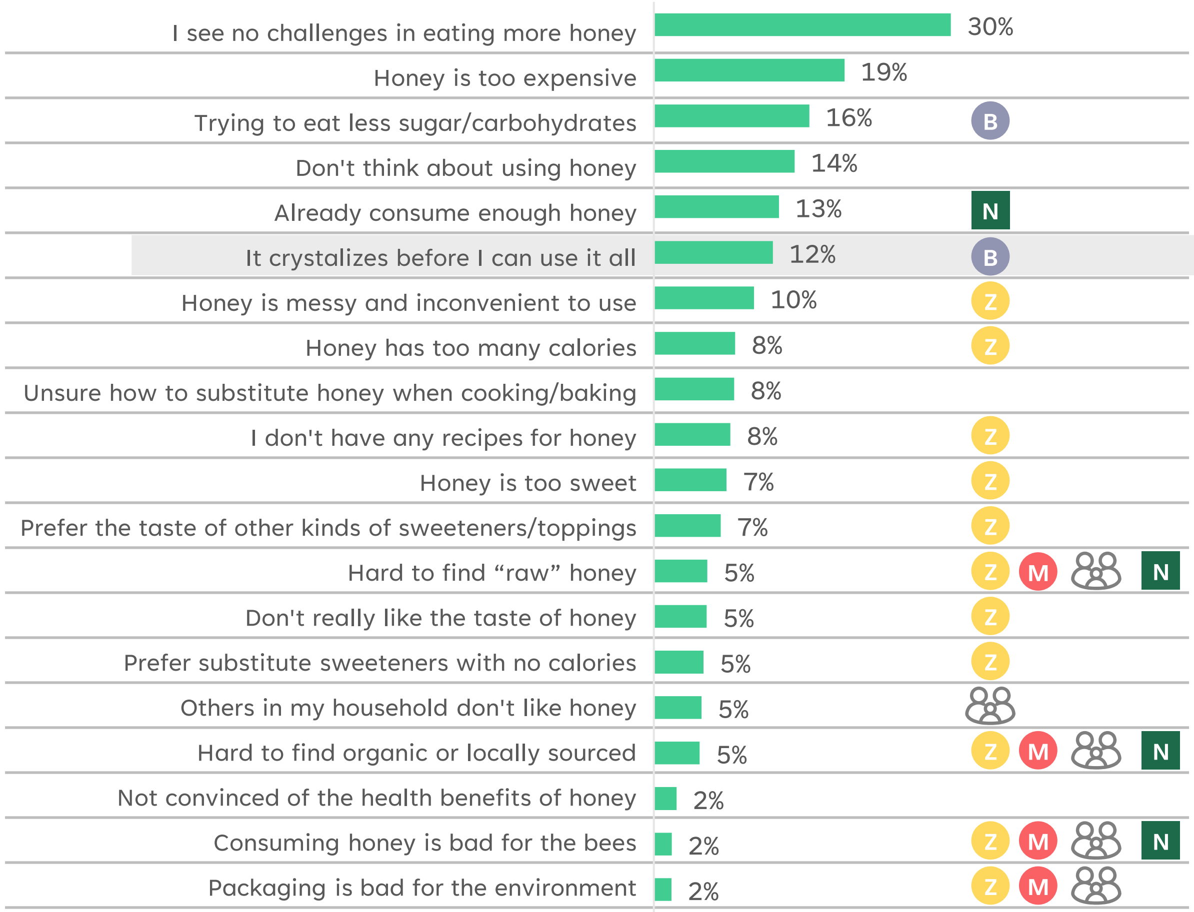
Base: Total (n=2,469), Natural Nourisher (n=475); Anticipating eating more honey Total (n=542), Natural Nourisher (n=180).

Price, diet and consideration are the top barriers to eating more honey

Seven-in-ten find at least one challenge to using more honey, with no single barrier being a dominant force. Price, diet and conscious consideration top the list as the most common challenges. Overcoming these challenges will require messaging that not only highlights honey's value, but also helps to increase top of mind awareness and consideration. Focusing on a broader array of concerns will be necessary to reach the younger Gen Z audience.

Honey crystallization is a barrier to just over one-in-ten; however, the majority have solutions to this problem already. Close to half reheat honey and another 20% use it in the crystalized form.

Challenges to using more honey
(What challenges, if any, do you face that prevent you from using more honey?)



Crystalized honey
(What, if anything, do you do if the honey you have crystallizes?)

45% re-heat it so the honey will liquify (52% among Natural Nourishers)

20% use the crystalized honey as is (25% among Natural Nourishers)

22% have not had honey crystalize (17% among Natural Nourishers)

22% throw it away (19% among Natural Nourishers)

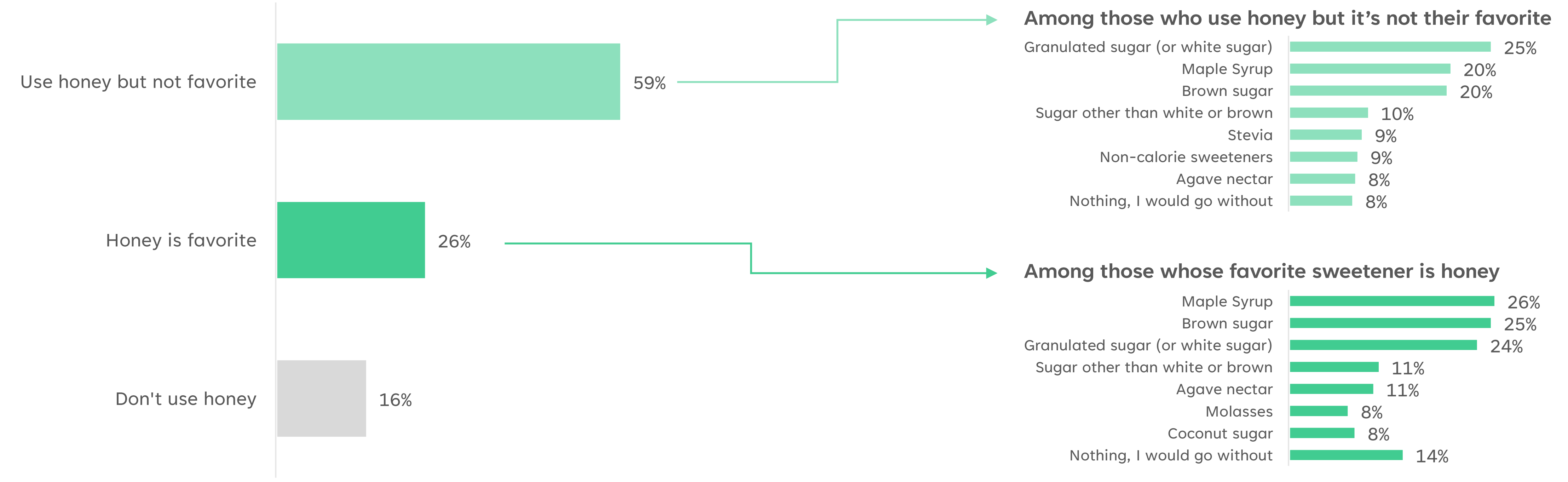
Over-index at ≥120 among....
Z Gen Z · M Millennials · X Gen X · B Boomers · Households with kids · N Natural Nourishers

Base: Total (n=2,469), Natural Nourishers (n=475), Gen Z (n=327), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

Those who prefer honey will substitute maple syrup and brown sugar, while those who prefer other sweeteners turn to granulated/white sugar as a replacement

Type of honey user
(Thinking about a typical week, how often do you usually eat the following types of sweeteners, either by themselves or in other foods or beverages?/Which is your favorite?)

Most likely honey substitute
(If you were out of honey, which of the following would you most likely use as a sweetener instead?) 8% or higher shown



If a product is perceived as substitutable for honey, honey may also substitute for that product. That is, scenarios for using white sugar, maple syrup and brown sugar are potential opportunities for honey among the many adults who have other favorites. Given the perceived differences among these sweeteners, these opportunities should be evaluated one by one. Honey may be a more credible substitute for brown sugar than for white, for example.

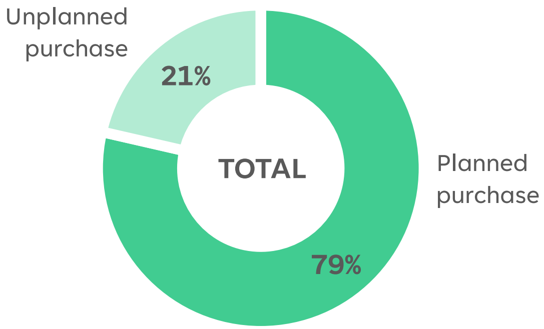
Base: Total (n=2469), Honey user (n=2,095), Honey is favorite among total (n=640), Honey user non-favorite (1,475).

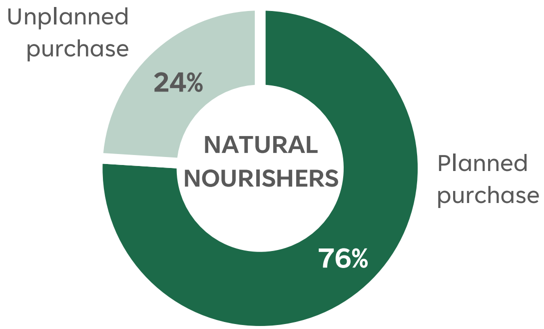
SWEETENER PATH TO PURCHASE

Most honey purchases are planned, to restock the household supply

Planned vs. Unplanned Honey Purchases

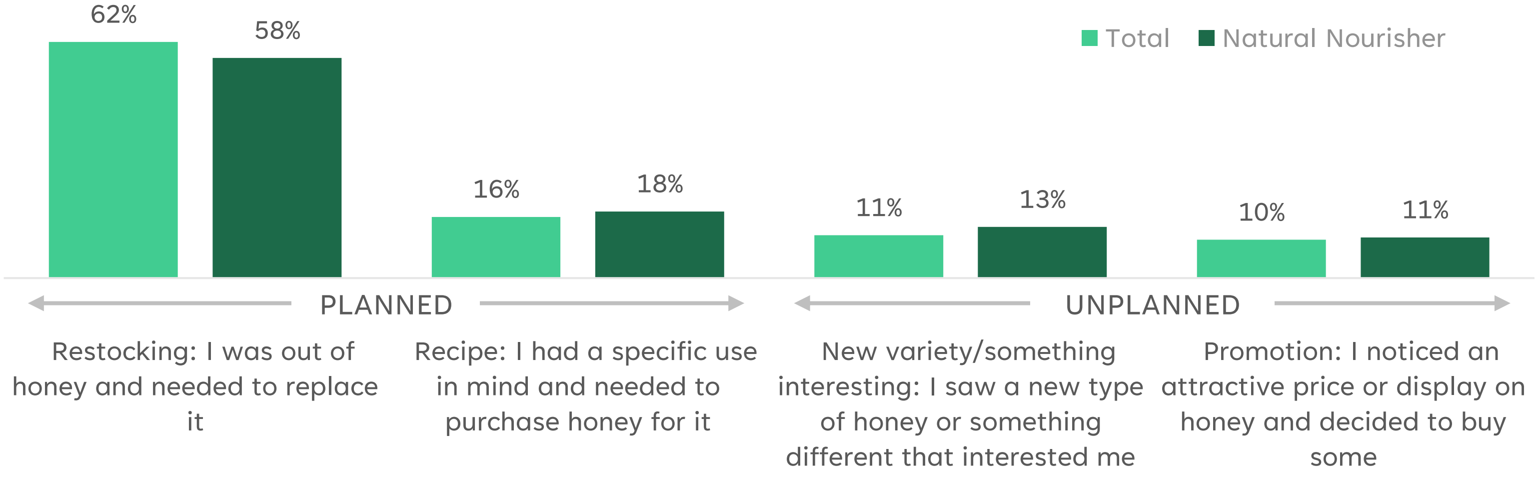
(Thinking about the last time you bought honey, what was the reason you decided to purchase it that day?)





Specific Reasons for Honey Purchases

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



The pattern of planned vs. unplanned purchases among Natural Nourishers mirrors that of shoppers overall.

Planned purchases typically arise from the goal of restocking. This implies that honey is something many shoppers keep on hand. To motivate additional purchases, therefore, shoppers may simply need more reasons to use their honey, including, perhaps, inspiration and guidance for how to substitute honey for other sweeteners.

 Base: Purchased honey in the past year Total (n=2,019), Natural Nourishers (n=442).

Honey is purchased at a variety of locations

Honey Purchase Channels

(Please indicate where you typically purchase HONEY.)

Channel	Total	Natural Nourishers	Natural Nourishers vs. Total	Total 2024 vs. 2023
Traditional Grocery Store/Supermarket	55%	51%	-4 pts	0 pts
Supercenter	42%	46%	+3 pts	-4 pts
Farmer's market	25%	31%	+6 pts	0 pts
Natural food store	22%	32%	+10 pts	-2 pts
Club store	16%	19%	+3 pts	-3 pts
Local cooperative or beekeeper	12%	16%	+4 pts	+2 pts
Dollar store	9%	13%	+3 pts	0 pts
Online through grocery delivery app or retailer's online portal	8%	13%	+5 pts	-4 pts
Online-only retailer	7%	12%	+5 pts	-1 pts
Specialty store	5%	8%	+3 pts	-1 pts
Drug store	4%	6%	+2 pts	+1 pts

Honey is sourced both from traditional channels such as grocery and mass merchandisers as well as from less common channels such as farmer's markets, local co-ops and beekeepers. The leading position of grocery stores and mass merchandisers in honey sourcing aligns with fact that most honey purchases occur during stock-up trips, which favor these channels. As few people frequently shop farmer's markets, local co-ops or at beekeepers, trips to these locations may be driven by honey or other specialty items.

Natural Nourishers typically get their honey from a wider array of sources, especially from natural food stores, farmer's markets or online.

Consumer A&U 2024 Base: Purchased honey in the past year Total (n=2,095), Natural Nourishers (n=448).

Natural Nourishers rely on fresh-quality cues such as organic, local or unfiltered when selecting honey

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?)

Criteria	Total	Natural Nourishers	Natural Nourishers vs. Total	Total 2024 vs. 2023	Over-indexing vs. Total
Price	59%	49%	-9 pts	+4 pts	
Container size	40%	26%	-13 pts	+4 pts	
Type or form (liquid, whipped, comb)	34%	28%	-6 pts	+2 pts	
A brand I know and trust	31%	28%	-3 pts	-2 pts	
Labeled as local	25%	30%	+5 pts	+1 pts	N
Labeled as unfiltered or raw	21%	29%	+8 pts	NA*	N
Labeled as organic	21%	33%	+12 pts	-1 pts	Z, M, Households with kids, N
Color or clarity of the honey	20%	21%	+1 pts	+4 pts	
Container type	19%	15%	-4 pts	+2 pts	
Country of origin	11%	14%	+4 pts	+2 pts	X, N
Varietal (Manuka, clover, wildflower)	8%	9%	+1 pts	-2 pts	B
True Source or other certification	7%	10%	+2 pts	0 pts	M, Households with kids, N
Flavored (vanilla, cinnamon, spicy-hot)	5%	7%	+2 pts	0 pts	Z, M, Households with kids, N

■ Total
■ Natural Nourishers

Outside of price, many consumers consider basic functional aspects of honey, such as container size and form, as well as trusted brands. However, among Natural Nourishers, organic, raw and local tend to be more important.

Compared to last year, more consumers cite price and container size as important criteria when purchasing honey. Price and container size might be related as we will see that consumers are trading down in package size (see slide 53).

Over-index at ≥120 among....

Z Gen Z M Millennials X Gen X B Boomers Households with kids N Natural Nourishers

Base: Total (n=2,469), Natural Nourishers (n=448), Gen Z (n=327), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

Honey users often have multiple containers of honey on hand and tend to store at least one in a cupboard

ON HAND AT HOME

1.6

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

45% have more than one container

1.9

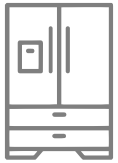
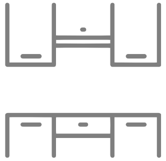
containers of honey at home among **NATURAL NOURISHERS** who buy honey

58% have more than one container

Natural Nourishers are more likely to have multiple containers on hand so will store the containers in multiple places in the house. While the cupboard or pantry is the most common place to store honey for both the general honey user and Natural Nourishers, a quarter of Natural Nourishers store honey on the counter making it more easily accessible and top of mind.

Producing attractive containers that allow users to display honey on the counter – while keeping it fresh – will help increase top of mind awareness for using honey.

WHERE STORED

Among Total

83% store honey in a cupboard/ pantry	**10%** store honey in the refrigerator	**17%** store honey on the counter

Among Natural Nourishers

81% store honey in a cupboard/ pantry	**15%** store honey in the refrigerator	**24%** store honey on the counter

Base: Honey user (Total n=2,095), Natural Nourishers (n=448); Have at least one container of honey Total (n=2016), Natural Nourishers (n=447).

HONEY PURCHASING – PAST 12 MONTH

Natural Nourishers are much more likely to buy glass containers of honey in addition to plastic

Among past-year purchases, squeezable plastic leads glass containers overall. Natural Nourishers are more likely to have glass containers of honey, but no less likely to have squeezable plastic as well; this implies that they keep a variety at home for different uses.

In terms of benefits, over the course of the year, nearly half of consumers say they bought honey labeled as local or US-produced, followed by raw/unfiltered and organic. Organic honey has especially wide reach among Natural Nourishers (33%).

FORMS

	Bought past 12 months Total	Natural Nourishers	Natural Nourishers vs. Total
Liquid	92%	96%	+4 pts
Another form (spread, whipped, comb)	15%	21%	+6 pts

CONTAINERS

	Bought past 12 months Total	Natural Nourishers	Natural Nourishers vs. Total
Squeezable plastic bottle	54%	51%	-3 pts
Glass bottle / jar	49%	64%	+15 pts
Hard plastic jar	29%	33%	+4 pts

BENEFITS

	Bought past 12 months Total	Natural Nourishers	Natural Nourishers vs. Total
Locally produced	47%	56%	+9 pts
Labeled as product of the USA	45%	50%	+5 pts
Raw, Unfiltered	38%	46%	+8 pts
Organic	33%	49%	+17 pts
Specific floral variety (such as clover or sage)	15%	17%	+3 pts
Flavor-infused honey (such as spicy-hot, vanilla, berry, ginger, cinnamon)	10%	15%	+6 pts
Imported	7%	10%	+3 pts

Base: Honey user Total (n=2,095), Natural Nourishers (n=448); Purchased honey in the past year Total (n=2019), Natural Nourisher (n=442).

Most honey shoppers report considering country of origin when purchasing honey, similar to last year

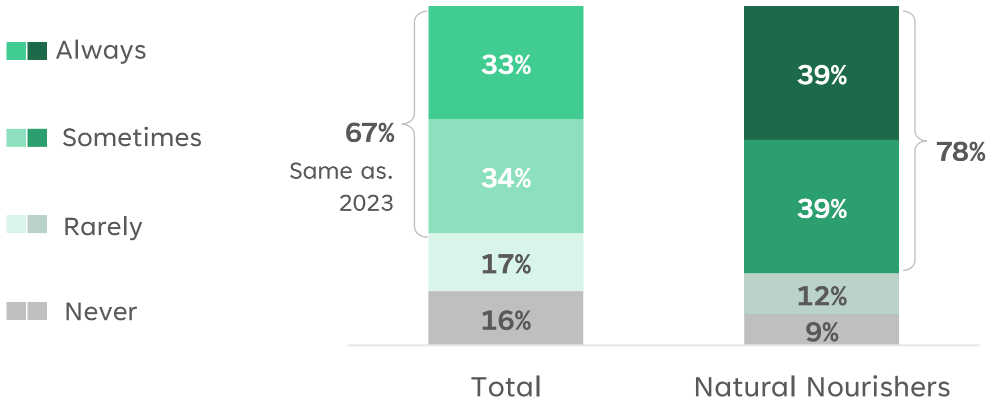
Over two-thirds say they at least sometimes consider country of origin when purchasing honey, and most report a preference for domestic honey. Some note using local honey to control allergies.

Local continues to grow in importance. Preference for local increased 6 percentage points between 2022 and 2023 and grew another 2 points in 2024.

Natural Nourishers, while more likely to consider country of origin, are just as likely to consider local over domestic as honey users in general, making this a message that can reach beyond just the target audience.

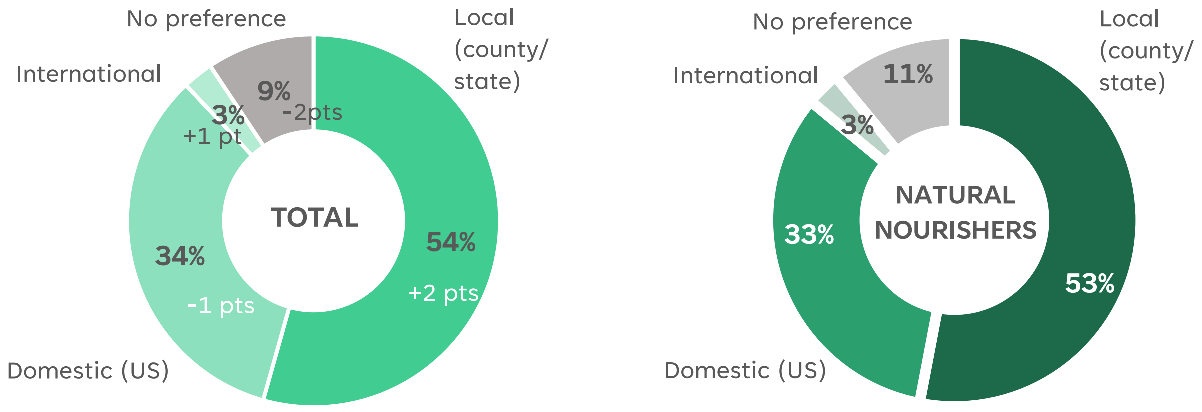
Consideration of Origin in Purchasing

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



Origin Preferences

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



Base: Purchased honey in the past year Total (n=2,095), Natural Nourishers (n=448); Always/Sometimes check for origin Total (n=1,397), Natural Nourishers (n=354).

When consumers buy raw honey, it is because they see it as natural, healthier and without additives

REASONS FOR RAW HONEY

(Which do you feel are good reasons for you to buy raw, unfiltered honey?)

Reason	Total	Natural Nourishers	Natural Nourishers vs. Total	Over-indexing vs. Total
All natural	54%	60%	+6 pts	
Healthier for me	45%	55%	+10 pts	Z, N
No additives	39%	44%	+5 pts	
Has a better flavor	34%	35%	+2 pts	Z
Retains more nutrients	29%	41%	+13 pts	N
Has a longer shelf life	19%	25%	+6 pts	Z, N
To maintain antimicrobial, antiviral, antifungal	19%	29%	+10 pts	X, N
Has a better texture	15%	22%	+7 pts	Z, N
To lower allergic response to pollen	14%	19%	+5 pts	N
Has the package size I want	13%	10%	-3 pts	
Is less expensive or on sale	10%	8%	-2 pts	Z
Has greater enzyme availability	10%	19%	+9 pts	Z, Households with kids, N
Is spreadable	8%	12%	+4 pts	Z, M, Households with kids, N
Is the only honey available	5%	7%	+2 pts	Z, M, Households with kids, N
There is no reason to buy raw honey	11%	4%	-7 pts	B

■ Total ■ Natural Nourishers

Natural Nourishers also select raw honey based on their perceptions that it has additional wellness properties: retaining more nutrients, maintaining antimicrobial, antiviral and antifungal properties and having better enzyme availability. Gen Z also tend to cite more benefits, presenting an opportunity to attract them to honey with raw/unfiltered claims.

Base Honey User: Total (n=2,095), Natural Nourishers (n=448), Gen Z (n=296), Millennial (n=652), Gen X (n=541), Boomer (n=606), HH with kids (n=745).

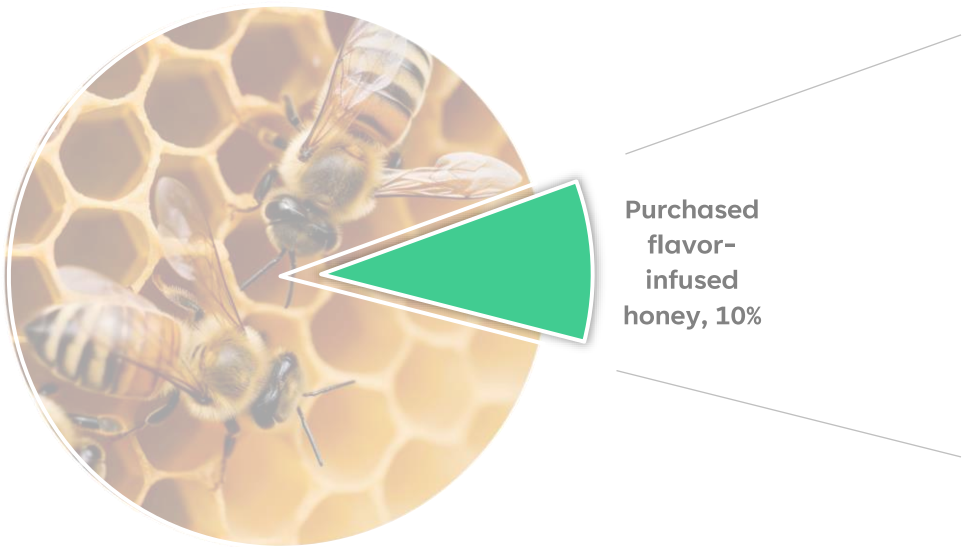
Over-index at ≥120 among....

Z Gen Z M Millennials X Gen X B Boomers Households with kids N Natural Nourishers

While few have recently purchased flavored honey, those who have chose fruit flavors and/or spicy-hot

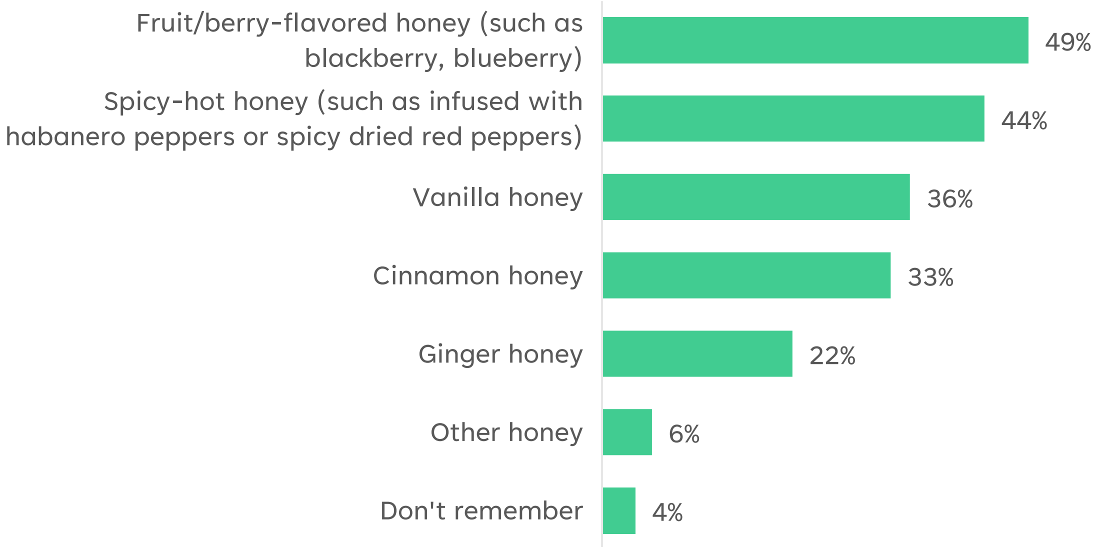
PURCHASED FLAVOR-INFUSED HONEY IN THE LAST 12 MONTHS

(In the past 12 months, which of these types of honey have you purchased?)



FLAVORS PURCHASED

(In the past 12 months, what flavor(s) of honey did you purchase?)
Among 10% who have purchased flavor infuse honey in the past 12 months



Among those who purchased flavor-infused honey, half purchased fruit and berry flavors followed by spicy-hot and sizeable minorities purchasing honey infused with spices such as vanilla, cinnamon or ginger. Offering different flavors for different occasions presents opportunity to capitalize on some current trends.

Base: Purchased honey in past 12 months (n=2019), Purchased flavored honey in the past year Total (n=210), Natural Nourisher (n=76*). * Caution small sample <100.

For a given purchase, a growing number of honey shoppers are choosing local or store brands rather than national

BRAND TYPES (as share of last purchase)

	Total	Natural Nourishers	Total 2024 vs. 2023
Local Brand	36%	40%	+1 pts
National Brand	29%	31%	-4 pts
Store Brand	23%	22%	+2 pts
Don't know/remember	13%	7%	+2 pts

Notwithstanding sales data from tracked channels, shoppers increasingly associate their last purchase with a store brand, +2pts from last year and +3pts from 2022.

They also continue to recall their most recent purchase as US-made. If honey sourcing has changed in aggregate, shoppers tend to be unaware of this. Natural Nourishers report purchasing similar types of brands but with more quality claims.

Base: Purchased honey in the past year Total (n=2019), Natural Nourishers (n=442).

Medium sizes continue to account for the largest share of purchases, but shoppers are slightly more likely this year to choose a small size

CONTAINER SIZE
(as share of last purchase)

11%
are large/bulk size (>24 oz)
12% in 2023
13% among Natural Nourishers

48%
are medium size (16-24 oz)
51% in 2023
59% among Natural Nourishers

41%
are small size (≤16 oz)
37% in 2023
28% among Natural Nourishers

CONTAINER TYPE
(as share of last purchase)

35%
are bought as a glass bottle/jar
43% among Natural Nourishers

18%
are bought as a hard plastic jar
18% among Natural Nourishers

46%
are bought as a squeezable plastic bottle
39% among Natural Nourishers

Shoppers show subtle signs of downsizing their honey purchases, with slightly more now purchasing containers that are 16oz or smaller. The size of this shift is consistent with the slight growth in lighter users, as well as with the modest increase in price as an important selection factor.

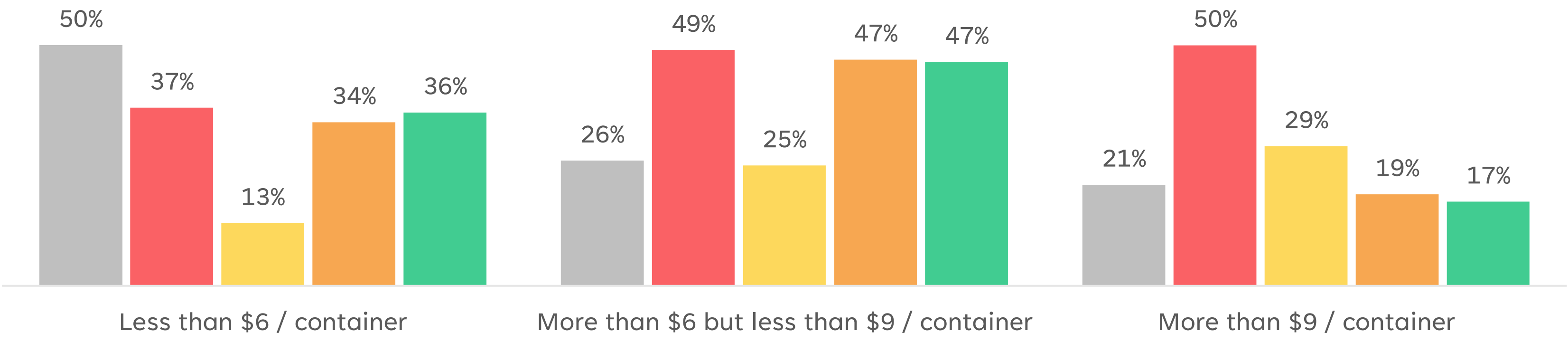
Natural Nourishers tend to bypass the smallest container sizes in favor of medium sizes. This segment is also more likely to have purchased honey in a glass bottle/jar rather than a squeezable plastic one for their most recent purchase.

 Base: Purchased honey in the past year Total (n=2019), Natural Nourishers (n=442).

Despite slight declines in container size, shoppers report no change in price-point

Consumers report paying the same ranges of prices for honey as they did in 2023, even though they also indicate a slight downward shift in container size. Less than a perception of shrinkflation, this likely reflects the shopper's belief that they have maintained the price range they are comfortable with. Natural Nourishers report paying more for honey than others, consistent with the additional claims they seek.

PRICE PAID (as share of last purchase)

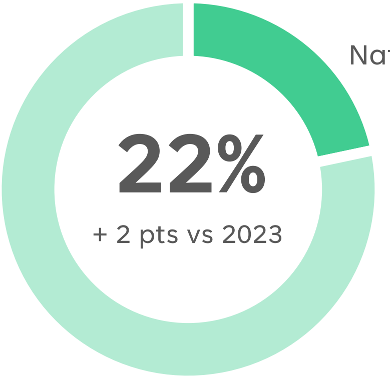


21% among Natural Nourishers

51% among Natural Nourishers

28% among Natural Nourishers

PURCHASED ON SALE, PROMOTION OR DISCOUNTED



23% among Natural Nourishers

 Base: Purchased honey in the past year Total (n=2,019); Natural Nourishers(n=442).

HONEY PURCHASING

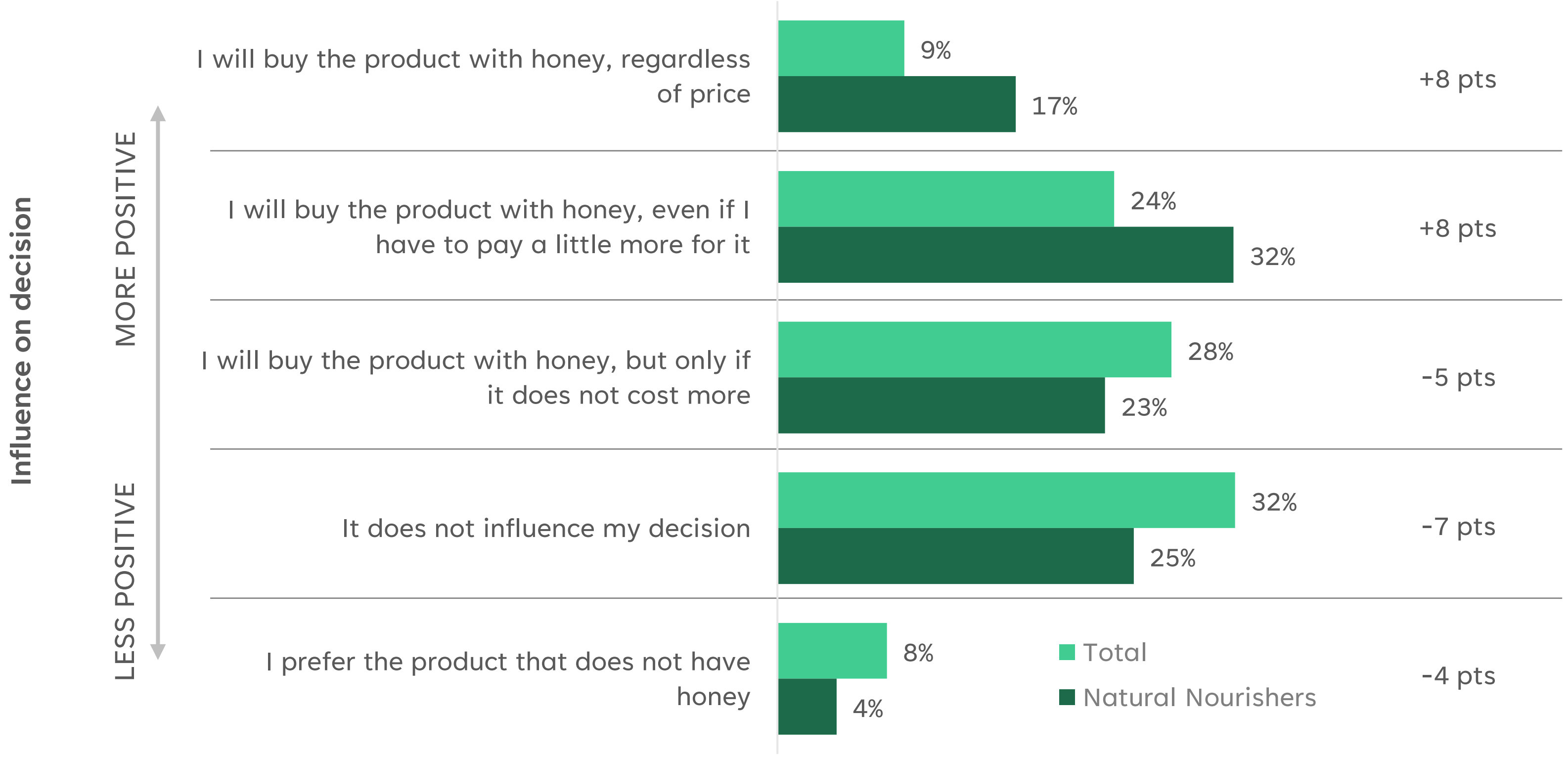
Most shoppers prefer products with honey, and one-third will pay more for them

When choosing between products that include honey versus those without, over 60% prefer the item that includes honey. This preference is even stronger among Natural Nourishers: 71% prefer the item with honey. About half of Natural Nourishers are willing to pay more for items with honey.

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

Imagine two similar products side-by-side in the grocery store or while shopping online:

- One product has HONEY in it
- The other product does not have any HONEY in it



Base: Total (n=2,469), Natural Nourishers (n=475).

Honey's perceived value as an ingredient rebounded last year from a four-year dip and has held onto its gains

The shopper's willingness to pay more for products containing honey reflects a complex mixture of the overall benefit seen in its presence, its advantages over other sweeteners, and general price sensitivity. From 2019 to 2022, half of shoppers reported no perceived advantage at all for honey as an ingredient, even as some shoppers maintained a willingness to pay a premium for it. While inflationary concerns may have peaked for shoppers in 2023*, honey's equity as an ingredient rebounded to its 2018 levels. In 2024 once again, one-third of shoppers say they will pay more for a product with honey.

Among lower/middle-income shoppers, one-third prefer a product with honey, but only if it doesn't cost more.

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

Influence on decision (MORE POSITIVE → LESS POSITIVE)

	TOTAL							
	2018	2019	2020	2021	2022	2023	2024	2024 vs. 2023
I will buy the product with honey, regardless of price	17%	4%	6%	10%	11%	11%	**9%**	-2 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%	**24%**	-2 pts
I will buy the product with honey, but only if it does not cost more	22%	27%	27%	25%	24%	26%	**28%**	+2 pts
It does not influence my decision	32%	45%	39%	36%	40%	31%	**32%**	+1 pts
I prefer the product that does not have honey	6%	10%	12%	12%	9%	5%	**8%**	+3 pts

Base: Total 2018 (n=2,003), 2019 (n=2,001), 2020 (n=2,000), 2021 (n=2,000), 2022 (n=2,051), 2023 (n=2,265), 2024 (n=2,469); earn between $35K -$99K (n=1142).

SUSTAINABILITY PERCEPTIONS & SYNTHETIC ALTERNATIVES

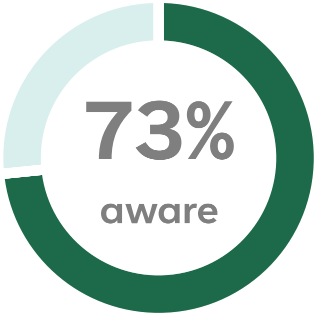
Most consumers are aware of the declining bee population

Awareness of Declining Honey Bee Population
(Are you aware of the declining honey bee population?)

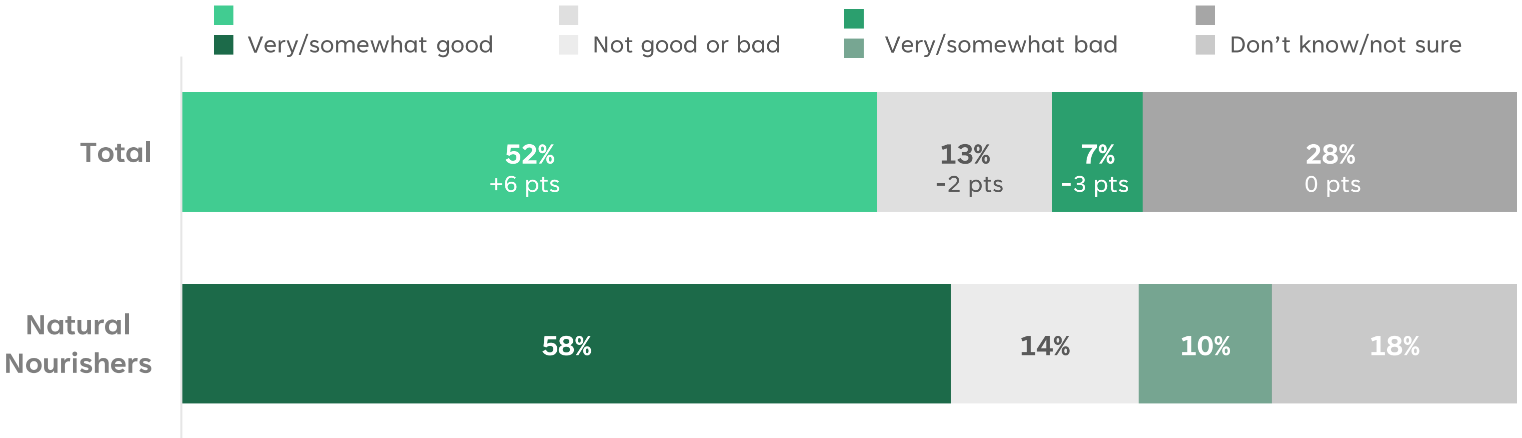
TOTAL

+2 pts vs. 2023

NATURAL NOURISHERS



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?)



Awareness is even stronger among Natural Nourishers. Messaging about use of honey being good for bees has impacted the general population as these views have improved (+6 points from 2023).

These positive views are not far behind the views of the Natural Nourishers suggesting this might be a message that is possible to continue growing, even beyond the target honey audience.

 Base: Total (n=2,469), Natural Nourishers (n=475).

Supporting honey bees and avoiding chemicals and artificial ingredients are important sustainability-related considerations when choosing honey and products with honey

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

Attribute	Total	Natural Nourishers	Natural Nourishers vs. Total	Total 2024 vs. 2023	Over-indexing vs. Total
Support bees (e.g., honey bee health, pollination, etc.)	74%	84%	+10 pts	+5 pts	
Avoid farming chemicals, pesticides, or chemical residue	72%	88%	+16 pts	0 pts	N
Make sure "natural" really means no artificial or synthetic ingredients	71%	88%	+16 pts	+1 pts	N
Purchase products that benefit your health	71%	88%	+17 pts	NA	N
Make sure "natural" foods are as healthy as they imply	69%	85%	+16 pts	+1 pts	N
Avoid foods or beverages that are ultra-processed*	66%	83%	+18 pts	+2 pts	N
Choose something sourced/farmed locally	59%	77%	+17 pts	0 pts	N
Choose something made without GMOs or bioengineering	53%	77%	+24 pts	+1 pts	N
Choose something organic or made with organic ingredients	53%	76%	+23 pts	0 pts	Z N
Purchase products from a company that works to improve the environment	51%	73%	+22 pts	NA	Z N
Save money	49%	54%	+5 pts	-1 pts	Z
Use packaging that is recyclable or environmentally friendly	48%	69%	+21 pts	-3 pts	N
Have a low carbon footprint	46%	65%	+20 pts	-1 pts	Z N
Practice social responsibility (e.g., a % of proceeds donated)	40%	62%	+22 pts	0 pts	Z M N

The importance of supporting honey bees has grown from 2023. This growth comes as awareness of the declining bee population has climbed directionally, up 2 percentage points.

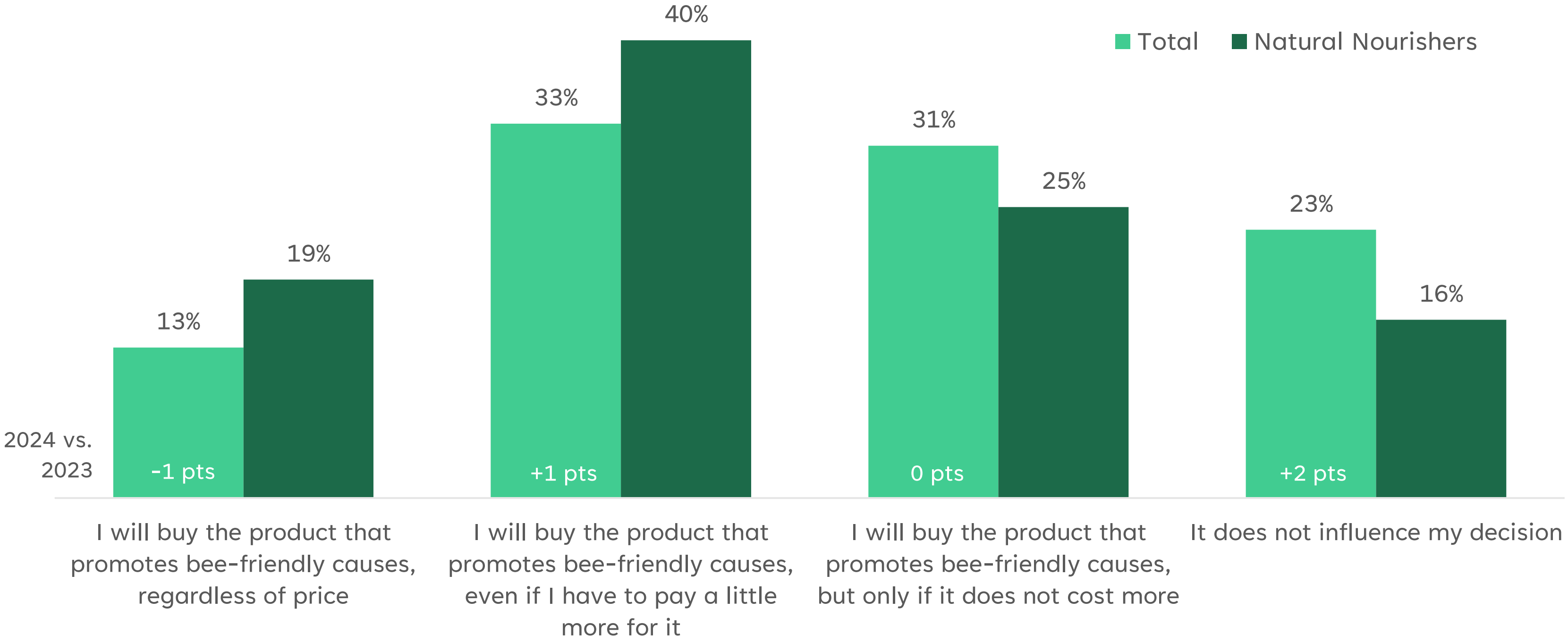
Natural Nourishers over-index on virtually all attributes, with 88% of this segment prioritizing making sure natural means no artificial or synthetic ingredients as a top priority. Gen Z finds company practices important.

Over-index at ≥120 among....

Z Gen Z   M Millennials   X Gen X   B Boomers   Households with kids   N Natural Nourishers

Consumer willingness to support bee-friendly causes remains strong, similar to 2023

Impact of Bee-Friendly Causes on Product Value Perception
(Which statement more accurately reflects which product you will purchase?)



Three-quarters of all shoppers are willing to buy products that support bee-friendly causes; however, only half are willing to pay more for this support.

As expected, a greater percent of Natural Nourishers will pay at least a little more than consumers in general.

Base: Total (n=2,469), Natural Nourishers (n=475), 2023 n=2265.

Interest in synthetic honey remains low

Description of a New Product

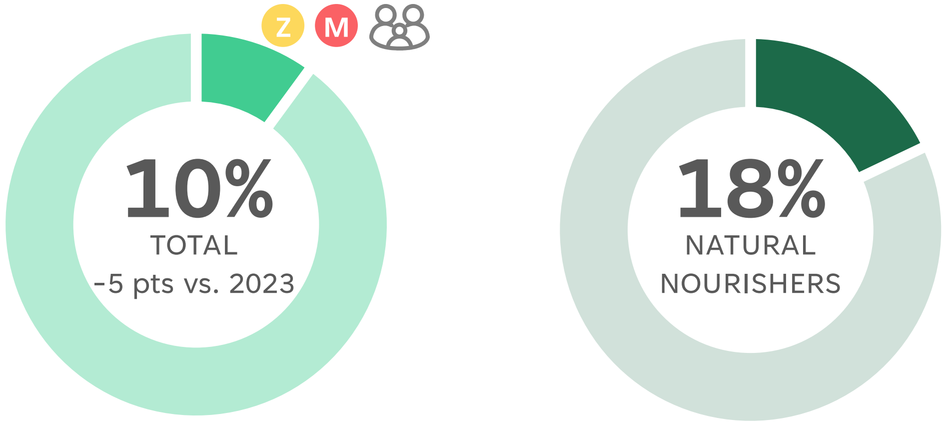
HONEY WITHOUT BEES

By recreating biological processes, it is now possible to cultivate honey without directly involving bees.

- *Similar taste, texture and aroma as natural, bee-produced honey*
- *No exposure to pesticides or contaminants*
- *No risk of disruption from declining bee habitats*
- *Comparable price to natural honey*

Likelihood to Try Synthetic Honey

(How likely would you be to try HONEY WITHOUT BEES?) Showing Extremely/Very likely to try



Over-index at ≥120 among….

Z Gen Z M Millennials X Gen X B Boomers Household with kids

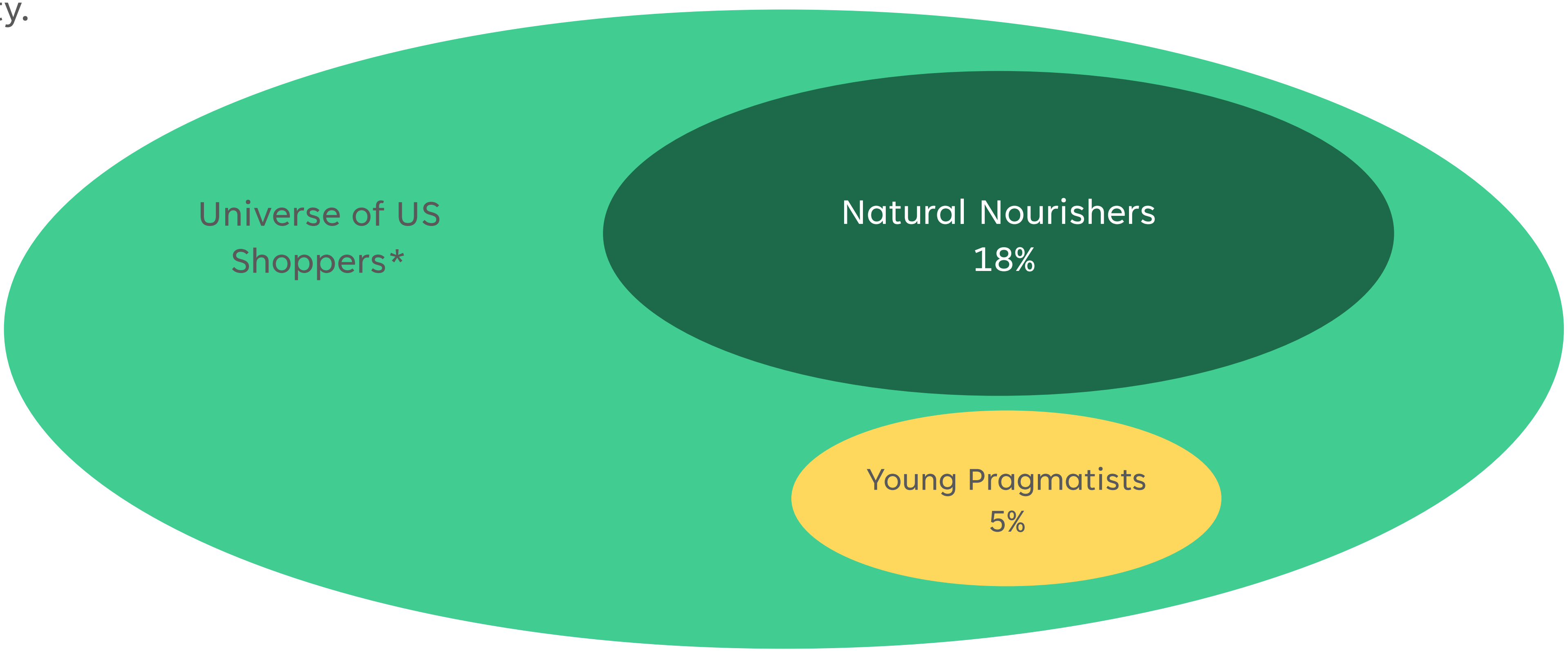
Interest in synthetic honey is low overall, and even down 5 percentage points from 2023. However, within the Natural Nourishers audience, almost twice as many consumers say they would try synthetic honey. Additionally, younger consumers are more inclined to show interest in honey without bees. The younger audience's interest in food technology is also seen in Hartman Group's Food & Technology 2023 report.

Base: Total (n=2,469), Natural Nourishers (n=344), Gen Z (n=475), Millennial(n=725), Gen X (n=628), Boomer (n=789), HH with kids (n=819).

SECONDARY TARGET

Adding an additional target beyond the Natural Nourishers can help the National Honey Board reach younger consumers with potential to grow honey usage

The segmentation exercise identified six potential segments of honey users. While the Natural Nourishers emerged as the primary audience to target, additional potential audiences were identified. The Young Pragmatists include those who are starting their journey of independence, and have interests in health and wellness, the environment and sustainability.



 Base: Total (n=2,469). * based on respondents weighted to represent the 86% of U.S. adults, 18-78 yo, who shop for food (92%) excluding 6% claiming allergies to honey.

Younger Pragmatists, ages 18-34, reflect important wellness trends and comprise a worthwhile target for additional influence

	Young Pragmatist	%	Index
Demographics	18-34-year-olds	100%	
	Single	43%	174
	Household with kids	37%	153
	Pacific region	20%	129
	South Atlantic	28%	130
	Northeast	5%	144
	Non-white	61%	174
Honey Usage	Heavy user	31%	125
	Medium user	37%	127
Favorite Sweetener	Honey	29%	112
Sweetener priorities (Top 2)	Flavorful	18%	113
	Healthy	15%	104
Honey preferences (Top 3)	Price	45%	77
	Labeled as organic	34%	162
	Type or form (liquid, whipped, comb etc.)	31%	92
Barriers	I see no challenges in eating more honey	23%	76
	Honey is too expensive	18%	95
	It crystalizes before I can use it all	12%	100
Honey motivations	Avoid farming chemicals, pesticides, or chemical residue	84%	117
	Purchase products that benefit your health	84%	118
	Support bees (e.g., honey bee health, pollination, etc.)	83%	112

The Young Healthy Pragmatists are Gen Z and younger Millennials. Accounting for 5% of all adult shoppers, they reflect a trend towards less purism and embrace food and technology. They reside where younger people live in the country and are predominantly non-white.

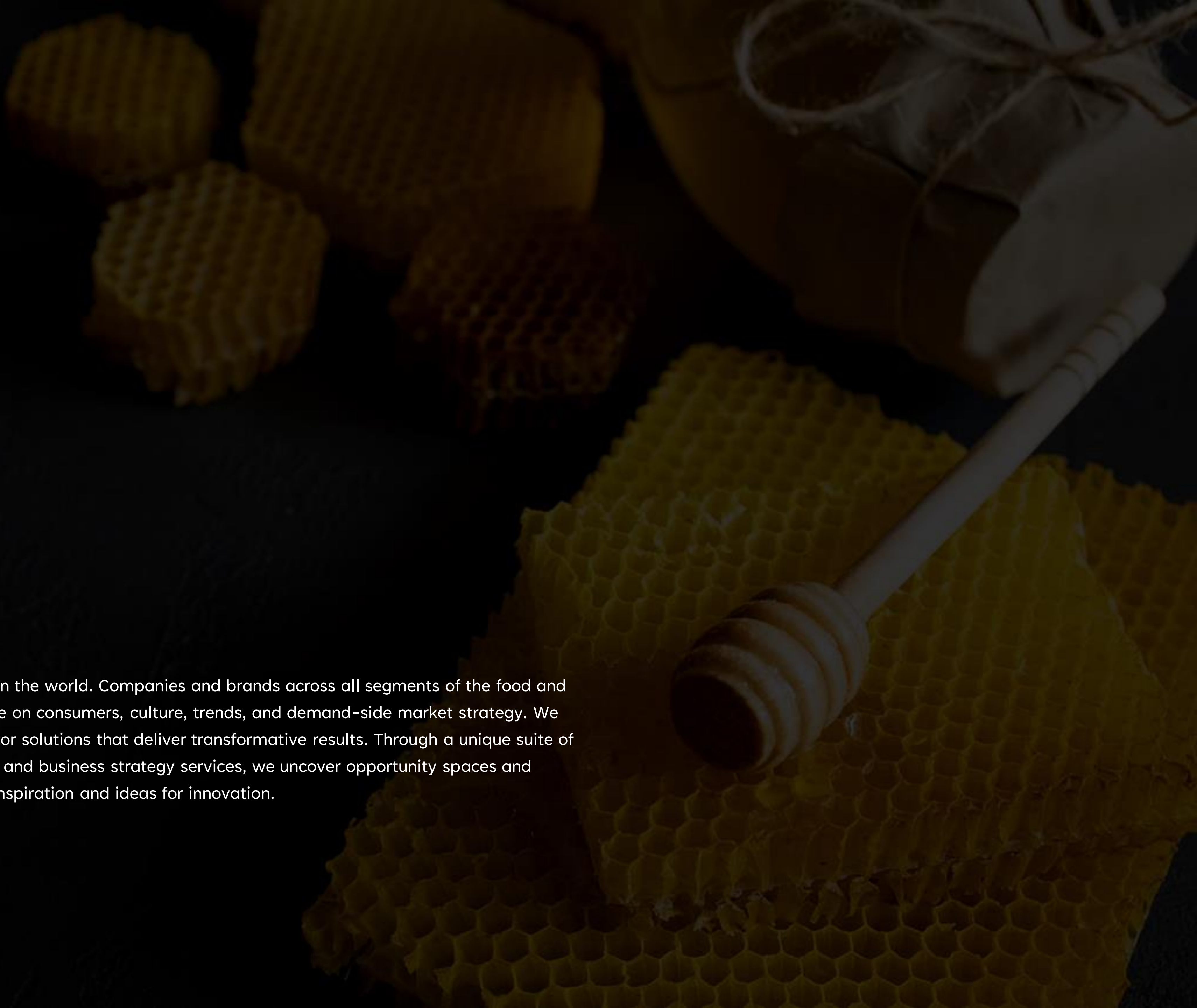
These consumers are not as heavy honey users as Natural Nourishers but as they are still formulating their consumption patterns, this could change. Young Healthy Pragmatists are interested in health and don't want to give up flavor. To reach this consumer, both flavor and ethics are relevant. This consumer is interested in health, but also has a strong environmental pull.

They have a range of hobbies and are big users of social media.

	Young Pragmatist	%	Index
Hobbies	Painting	17%	193
	Going out dancing	13%	185
	Playing games on a game console	35%	178
	Yoga	16%	150
	Photography	21%	147
Social Media	Instagram	58%	191
	YouTube	55%	132
	TikTok	52%	233
	Facebook	50%	118
	Snapchat	25%	282

Indices ≥ 120 are highlighted **orange**, indices ≤ 80 are highlighted **blue**.

Base: Young Pragmatists (n=157).



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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.

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