

Susanne Padel

Organic Research Centre

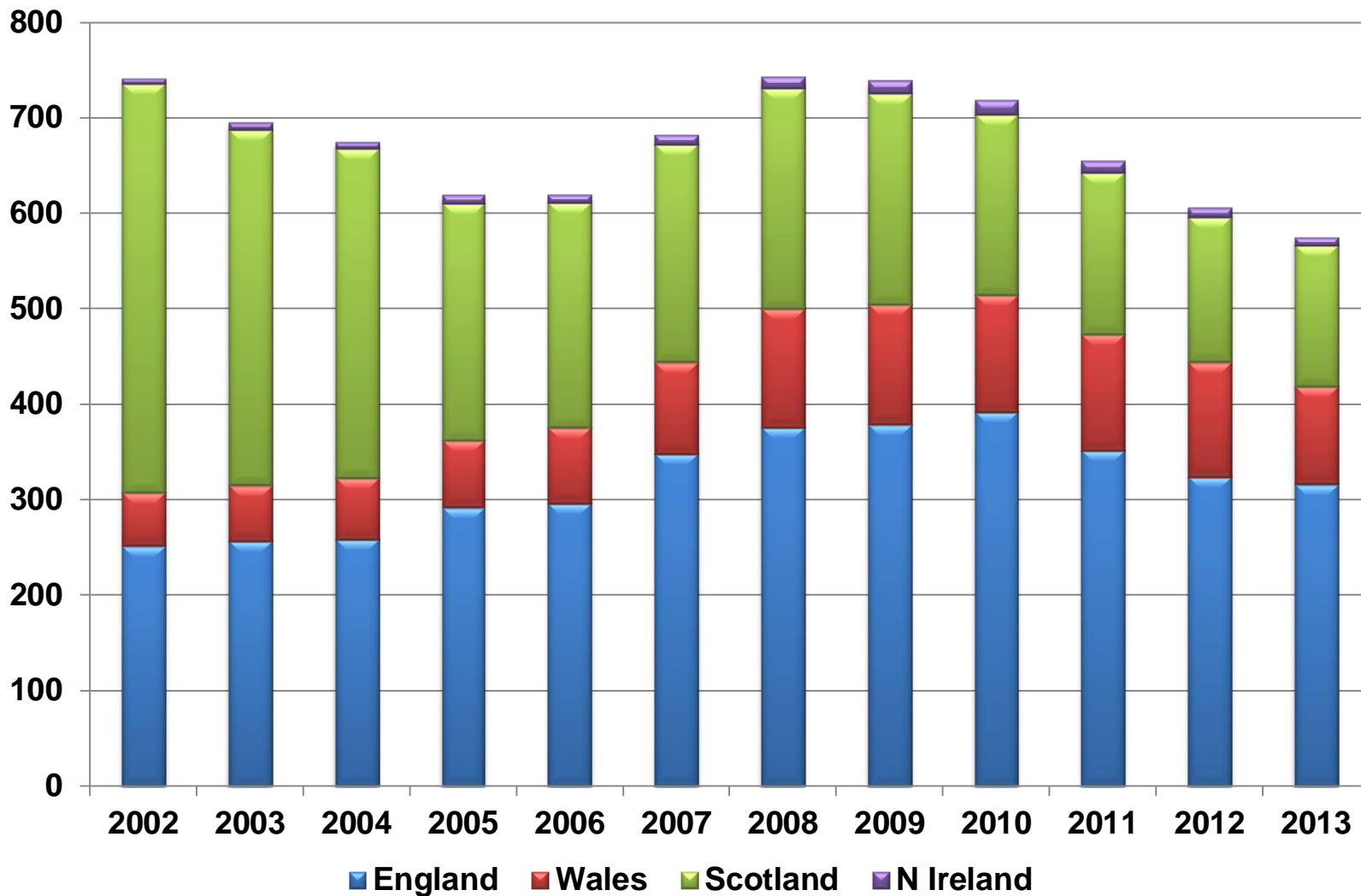


Data collection in the UK

- **Production data collected by Ministry (Defra)**
 - ◆ Some additional data through producer surveys in Wales and Scotland.
 - ◆ Additional survey in England was possible in 2013 through Organic Data Network
- **Annual Market Report published by Soil Association,**
 - ◆ based on several data sources
 - ◆ <http://www.soilassociation.org/marketreport>
 - ◆ 2015 Market report will be launched 24th February (*There will be a charge*)

Certified land area (kha) in UK nations

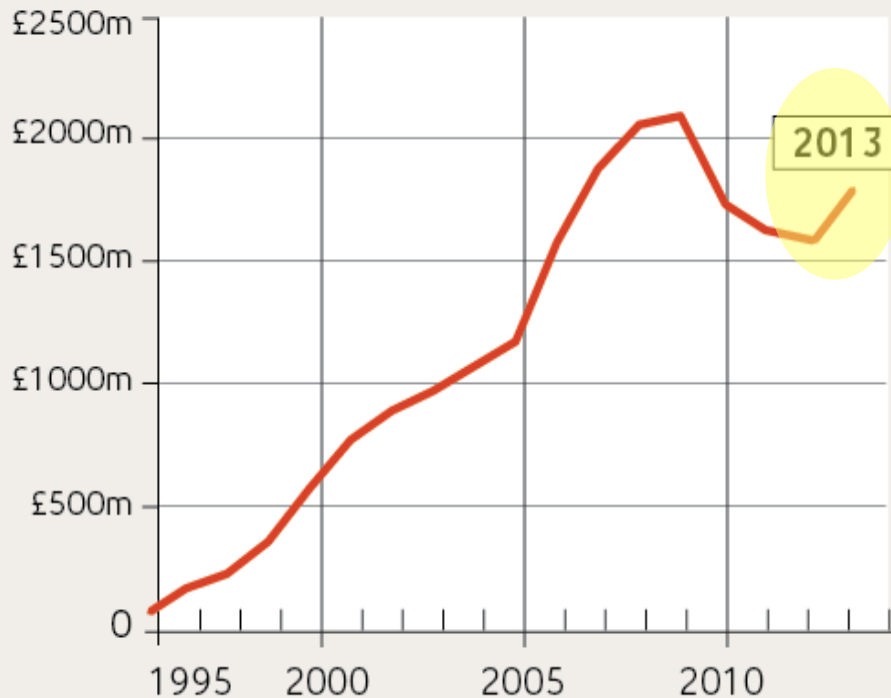
Source: Defra annual organic farming statistics



UK organic market – total picture in 2013



UK sales of organic products, 1995-2013



Source: Soil Association Organic Market Report

UK Organic Market 2013



UK sales up
2.8%



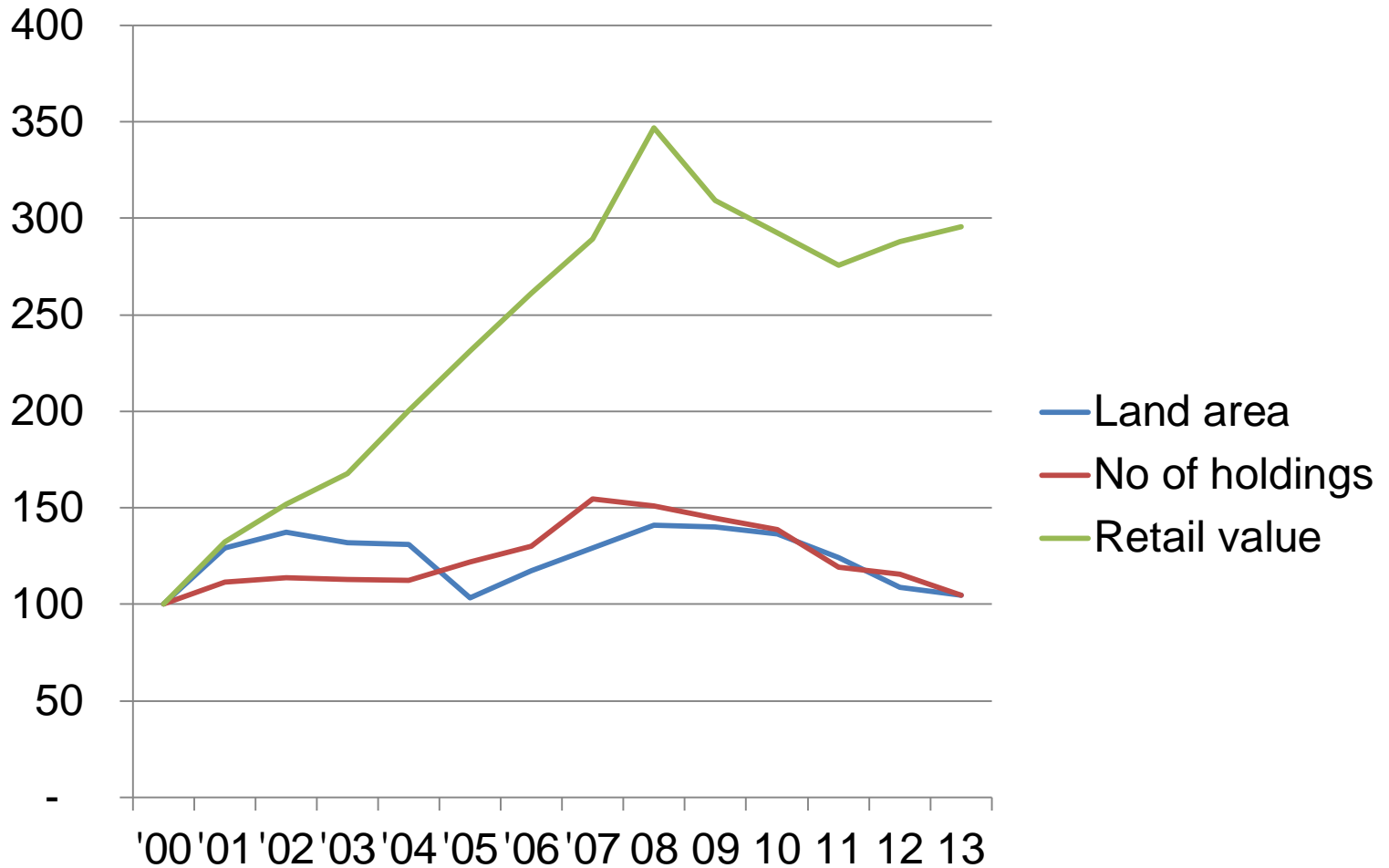
Total sales
£1.79 billion

Predicting growth

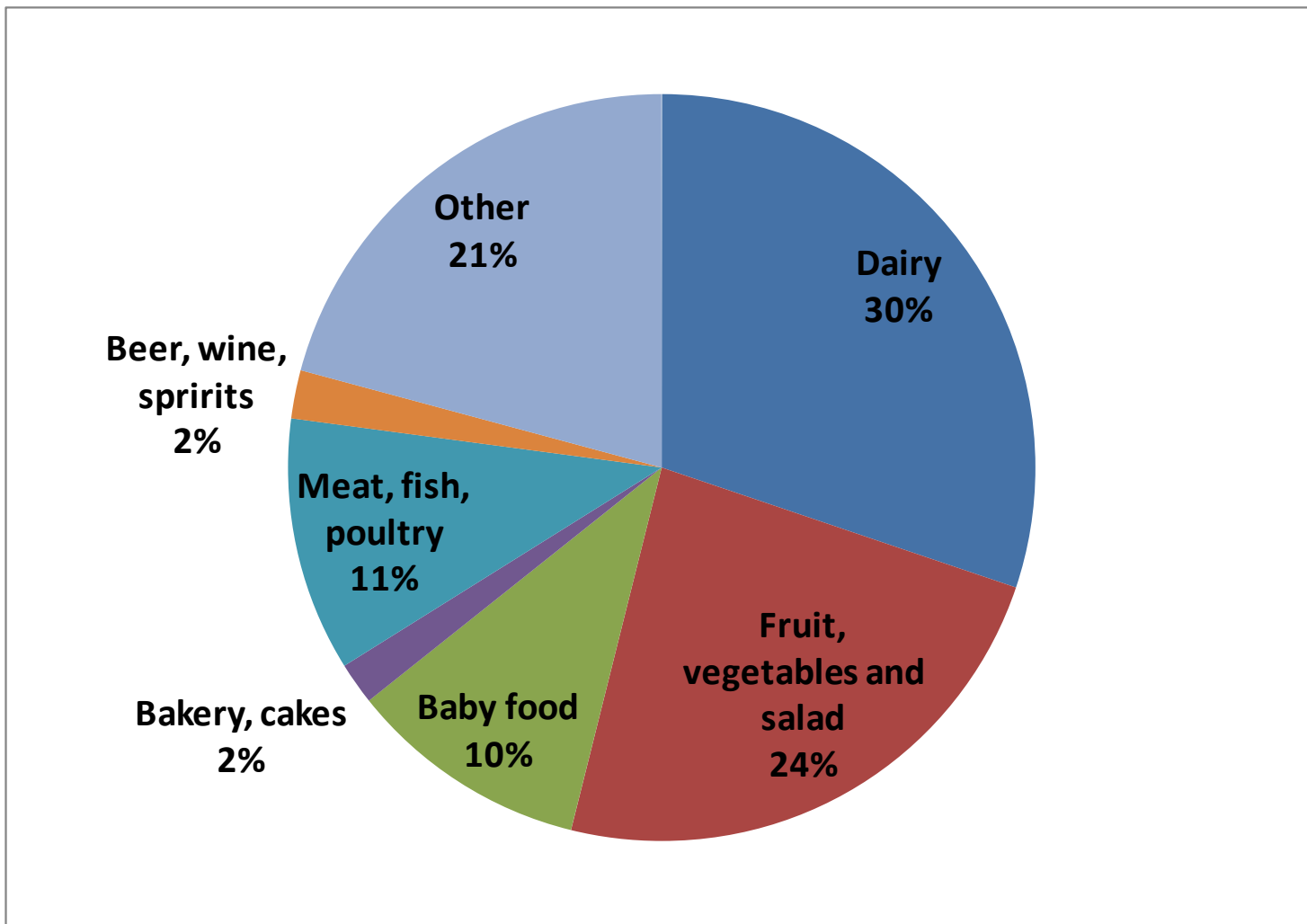
80% of leading
organic businesses and
84% of independent
retailers anticipate
increased sales in 2014

Similar or higher growth expected to be reported to December 2014
Against a decline in total food market.

Comparing the trends since 2000



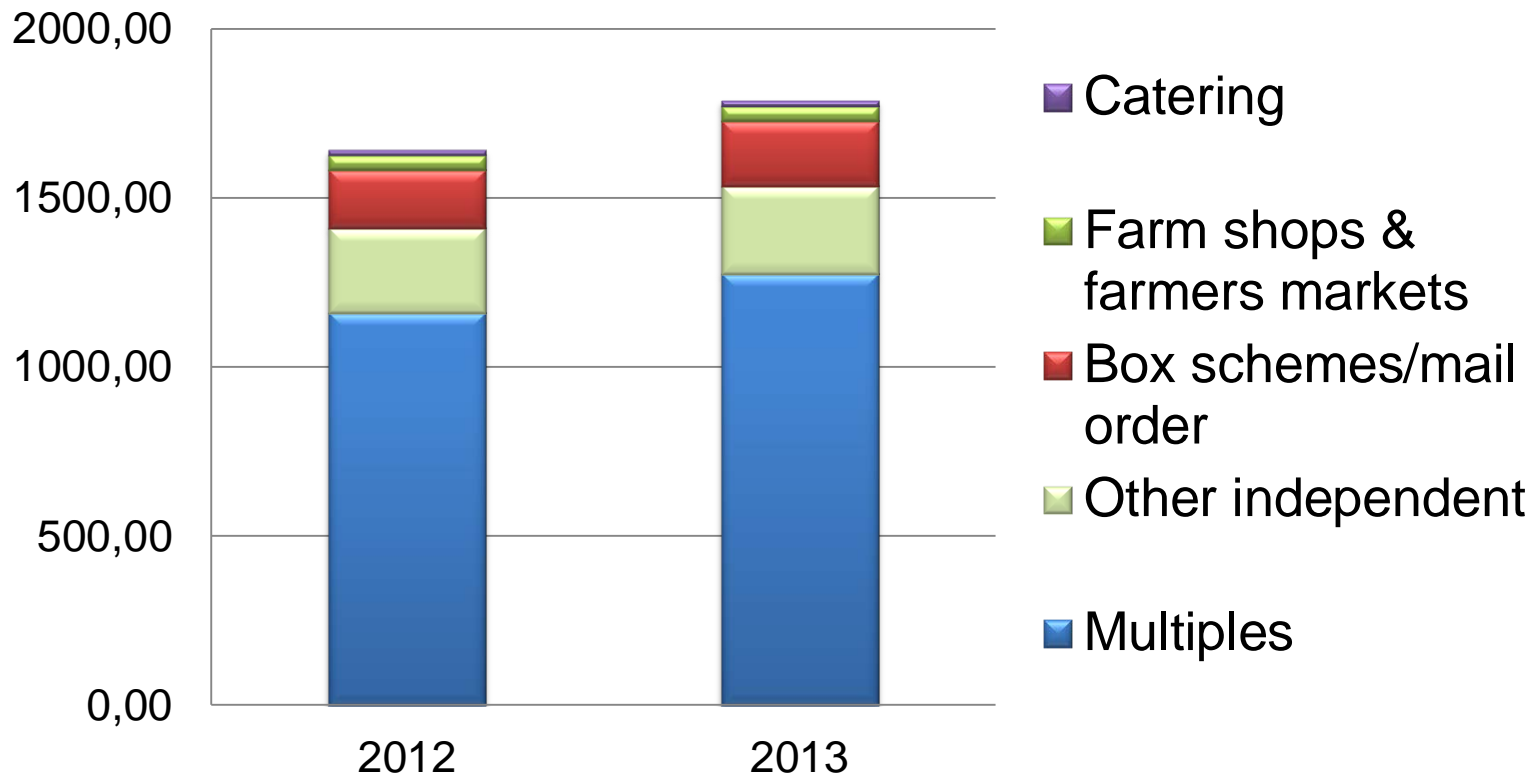
The most important product sectors in the market 2013



Some trends in 2014

- **Dairy (OMSCO 2015 market report)**
 - ◆ Sales of organic milk have risen by 6.4% to £151.3m on 0.3% volume growth, against standard milk falling by 1.6% in value, volumes by 0.5%
- **Fruit and vegetables**
 - ◆ One supplier reports increases of more than 5% sold through multiples,
 - ◆ Might to be the same for all
 - ◆ Various surveys to better get to grips with non-multiple sales
- **Eggs are doing well**
 - ◆ some supermarket initiatives at rebranding
- **Meat**
 - ◆ Appears to remain a more challenging category

Development of sales channels (1769.3 million GBP in 2013)



Strongest growth in independent sectors expected

Promotion campaign of OTB



They may look the same but organic cows eat a much more natural diet that's at least 60% grass, roughage or forage, guaranteed.

Organicuk If your food could talk, what would it tell you?

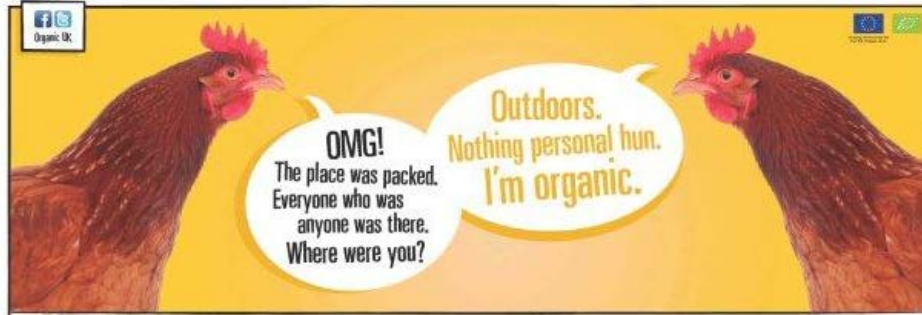
Organic. Naturally different.



They may look the same, but one way to reduce exposure to pesticides is to eat more organic food.

Organicuk If your food could talk, what would it tell you?

Organic. Naturally different.



Organic UK

Organic. Natu



Before you surrender to that sweet treat, think. They may look the same but one way to reduce your exposure to pesticides is to eat more organic food. You get what you pay for, so buy something organic today.

Organic. Naturally different.

85% of those who have seen campaign say they will buy organic in next fortnight

Conclusions

- **The 2015 Organic Market Report will be published 24 Feb**
<http://www.soilassociation.org/marketreport>
- After several years of decline the UK market is back in growth
 - ◆ Despite falling sales in the conventional sector
- Growth strongest in the independent sector
 - ◆ Box schemes, mail order, home delivery and sales through independent shops
- Multiple retailers remain the largest outlet
 - ◆ Retailers vary in performance and engagement
 - ◆ So far, limited sales of organic through discounters
- Production remains challenging, with land area declining
 - ◆ Slow response regarding new entrants
 - ◆ Existing producers taking on more land and livestock