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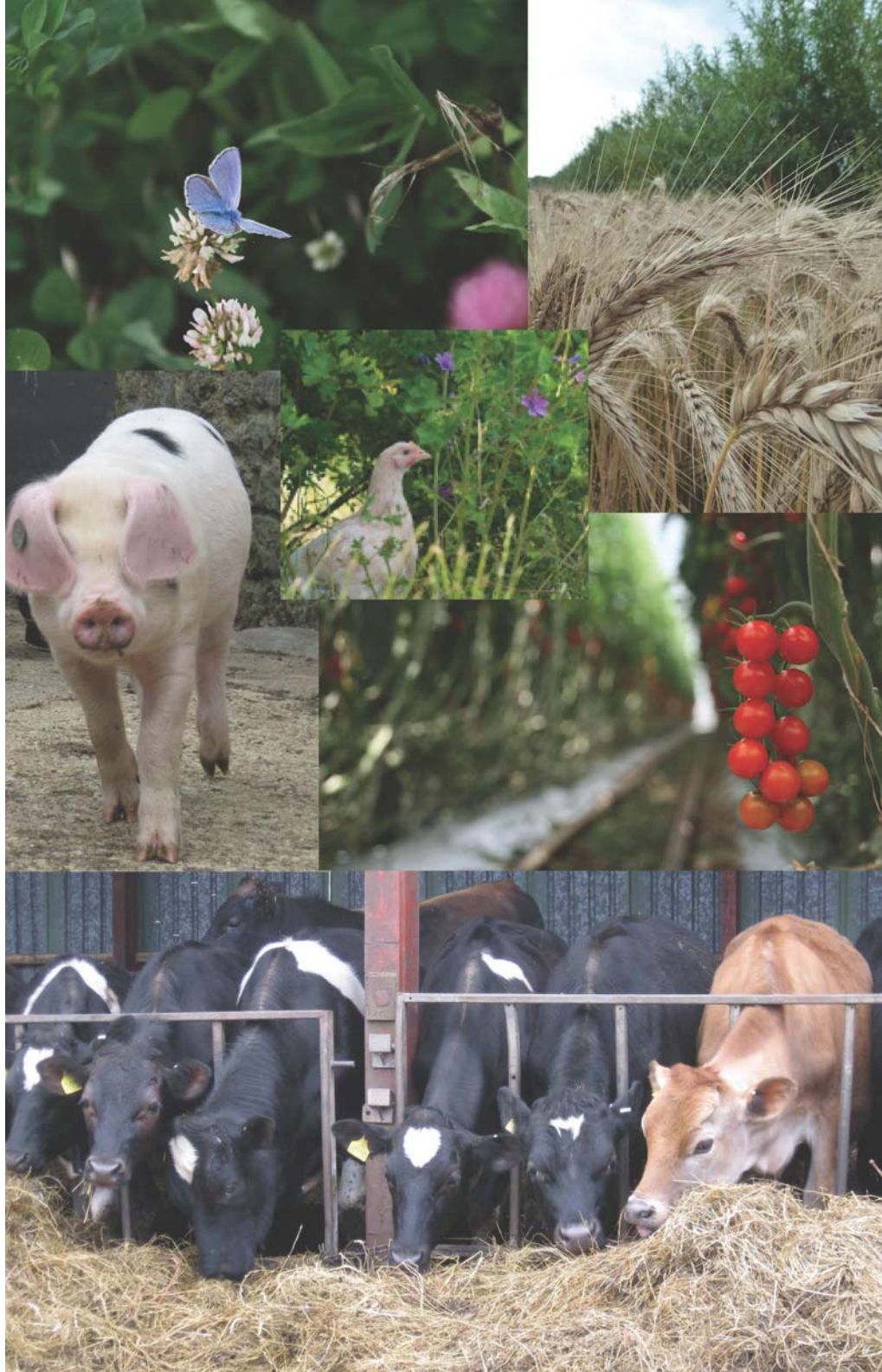
ELM FARM

REPORT 2/2014

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English Organic Producer Survey 2013

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While every effort has been made to ensure the accuracy of the results presented in this report, responsibility for any errors rests with the authors and feedback is always welcome. However, the quantification of the scale of the English organic sector is still an imprecise art and there are significant margins for error.



EXECUTIVE SUMMARY

This report summarises the results of a survey carried out with English organic producers in November and December 2013. There are approximately 2724 English organic producers and 223 of these participated in the survey, a response rate of just over 8%. The sample is not representative of the total population of English organic producers, see the data collection and analysis section for more details, but gives a snapshot of the situation for a large number of producers.

Table 1 indicates the crop areas and livestock numbers recorded by the survey. The survey figures were then extrapolated up using the overall sample size of 8.2% to estimate the total English cropping areas and livestock numbers for comparison with the figures published by Defra. It can be seen that the survey over-estimates organic grassland, arable and total areas as well as beef and sheep numbers and underestimates in-conversion area and pig and poultry numbers, however it should be noted that calculating sector totals from a sample of just 8.2% will result in inaccuracies.

Table 1: Surveyed crop areas, livestock numbers, extrapolated data and comparison with Defra organic statistical data

Area (hectares)	Survey value	Extrapolated value	Defra "Organic Statistics, 2012"
Total fully organic area	39,906	487,463	305,000
Organic grassland	29,029	354,597	234,999
Organic arable crops	6,567	80,217	36,806
Organic potatoes	26	317	780
Woodland	825	10,083	4,564
Total in-conversion area	738	9,012	19,000
Livestock type (number)			
Organic cattle	23,845	291,273	193,665
Organic sheep	46,899	572,883	419,731
Organic pigs	292	3,567	29,447
Organic poultry	82,332	1,005,706	1,675,524

The survey covered a range of farm types, though completed surveys showed greater coverage of beef and sheep and under-coverage of cereal holdings. The geographical distribution showed a slight under-coverage of the east of the country.

The producers were asked about their business intentions for the future with the majority indicating that they were not planning to change their business but some indicating that they may increase/intensify production. They were also asked about their intentions specifically with regards to remaining in organic production. The majority of organic farmers in England indicated that they plan to remain in organic farming in the medium to long term and 40% indicated that they plan to remain in organic farming for over 10 years suggesting that they are very committed to organic farming (see Figure 1 below).

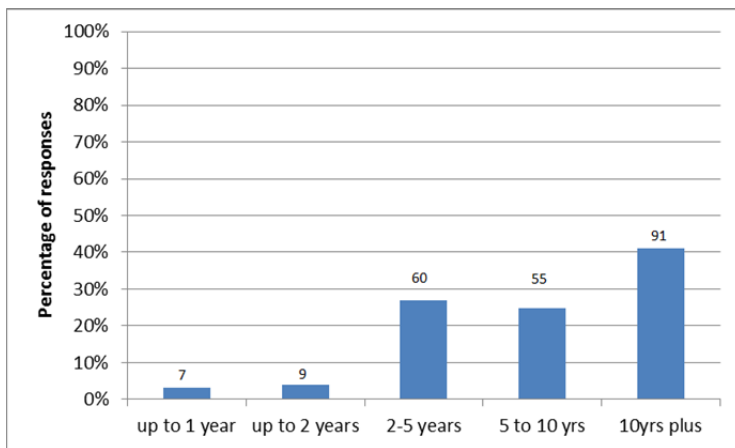


Figure 1: How long are you intending to farm organically?

There was a mixed picture with regards to producer perceptions of the performance of organic enterprises from November 2012 to October 2013. Organic beef producers reported that prices had been reasonable or good for most of the year, but that there had been a sudden drop in demand and prices in the last few months of the year, whereas lamb producers were much less positive about their situation (Figure 2). The responses from milk producers suggested a feeling of cautious optimism with many reporting increasing prices and a hope that supply and demand were equalising. Some expressed the hope that prices would continue to increase such that reinvestment as well as increasing costs of feed, energy and fuel could be covered. Very few pig producers were interviewed in the survey but the majority of those had concerns about feed prices (a concern also raised by the few egg producers who were surveyed). Many pigs were kept as a hobby or because they also had tourists on the farm who enjoyed seeing the pigs. Broiler producers suggested that prices would probably support continuing organic broiler production. Table 2 shows the proportions of organic livestock and their products sold as organic or sold as conventional. It can be seen from this that organic lamb and organic finished pigs are most likely to be sold as conventional, closely followed by store cattle. Finished beef and store pigs were also sold as conventional on occasion whereas sale as conventional was much less likely to occur for organic broilers, milk and eggs.

Table 2: The percentages of livestock products sold as organic or as conventional

Product	Percentage sold as organic	Percentage sold as conventional	Corrected percentage sold as conventional (factoring out in-conversion sales)
Finished Beef	77	23	16
Store beef	55	45	39
Finished lamb	59	41	37
Store lamb	49	51	50
Finished pigs	52	48	41
Store pigs	11	89	20
Broilers	93	7	7
Milk	98	2	2
Eggs	99.6	0.4	0.4

Arable production had been affected by the adverse weather conditions in the period covered, reflected in a wide range of yields reported. Horticultural producers were more aware of, and concerned about consumer perceptions of organic produce than other producers, perhaps as a result of making more of their sales directly to consumers. They were, however, generally positive about current level of prices and their ability to support organic horticultural production (Figure 2).

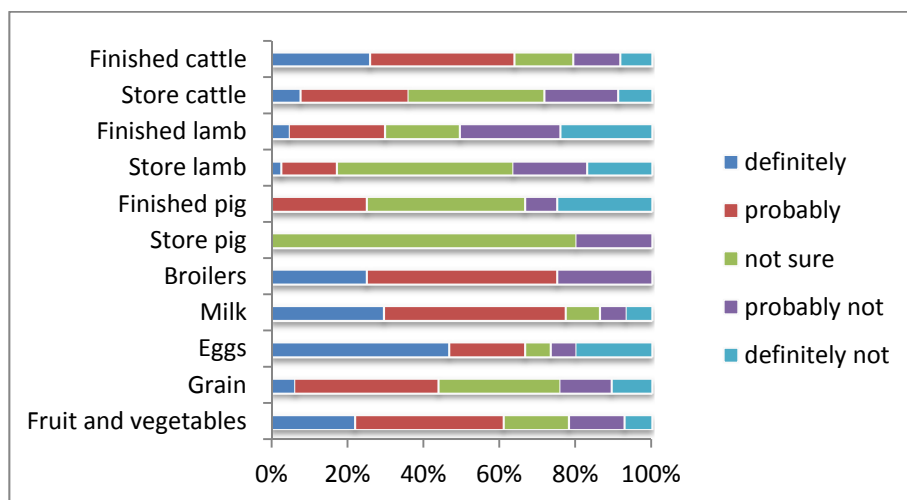


Figure 2: Is current price high enough to continue organic production?

The differing fortunes of the organic enterprises are reflected in the intentions of producers over the next two years with most producers planning to remain at current production levels, but milk and horticultural producers most likely to say that they plan to increase production and pigs and poultry to reduce (Figure 3). The fact that most producers plan to retain production at current levels is reassuring as it suggests that there will be stability in English organic production in the near future.

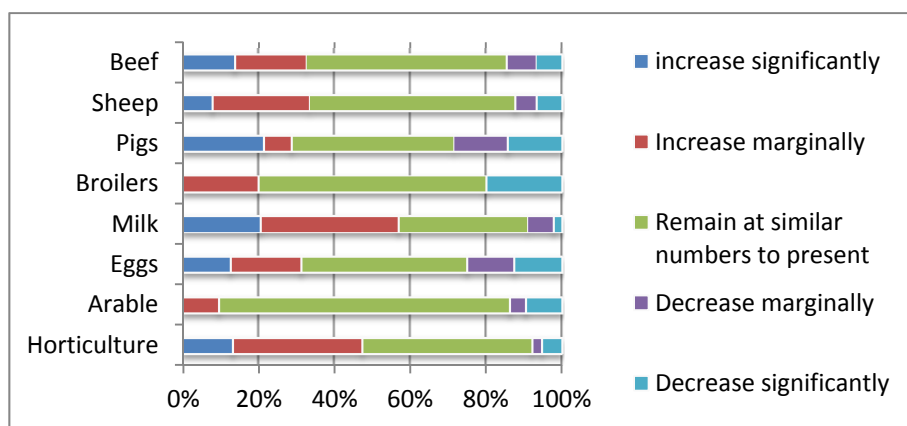


Figure 3: Intentions in the next two years with regards to production levels.

Overall, the majority of English organic producers surveyed intend to continue farming organically. They indicated that they farm in this way for their livestock and for the environment, but profitability may not be sufficient to cover rising costs and allow re-investment in their business. However, many commented that they would still farm in a low-input or environmentally friendly manner if they were not organic. Some producers also expressed a desire for more market information and greater market transparency and it is hoped that the survey and this report represent a first step towards this.

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1 INTRODUCTION

This report summarises the results of a telephone survey carried out with English organic producers in November and December 2013. Defra records indicate that there were 2724 producers (based on figures of 2589 producers and 135 producer/processors¹) in 2012, with 223 of these participating in the survey; just over 8% of the population.

Although the survey is not necessarily representative of the total population of English organic producers, it gives a good idea of the situation for a proportion of them for the period from 1st November 2012 to 31st October 2013.

The approach to the data collection and quantitative and qualitative analysis is explained in Appendix 1, the survey questions are given in full in Appendix 2.

2 GENERAL INFORMATION

2.1 Proportions of farm types

Table 3 shows the proportion of survey participants in each farm type giving an idea of the balance of the survey. This is compared to the proportions within organic farming in England as they were estimated in 2006-07 for use in the Farm Business Survey². It can be seen from the table that the survey appears to have sampled a greater proportion of beef and sheep and fewer cropping farms than would be expected if it was representative of the total population.

Table 3: Proportions of farm types represented in the survey

Farm type	Number of responses	Proportion of responses	Proportions estimated for 2006-07 FBS
Cropping	32	14.35%	24.83%
Horticulture	31	13.90%	11.03%
Pigs and poultry	6	2.69%	4.14%
Dairy	39	17.49%	20.69%
Beef and sheep	84	37.67%	24.14%
Mixed	21	9.42%	15.17%
Other	10	4.48%	

¹ Defra (2013) Organic Statistics 2012 <https://www.gov.uk/government/publications/organic-farming-statistics-2012>

² Moakes, S., Lampkin, N., Gerrard, C.L., (2013) Organic Farm Incomes in England and Wales 2011/12, Report of work for the Department for Environment, Food and Rural Affairs Contract reference: OF 0373



2.2 Crop areas and livestock numbers

Table 4 gives the total crop areas and livestock numbers covered by the survey. In some cases these were estimated by the producers and so should be treated with a degree of caution. Other livestock on the farms included alpacas, goats, horses and deer.

The survey figures were extrapolated to sector level using the survey response rate of 8.2% to estimate the total crop areas and livestock numbers for England and these values were compared with data from Defra for 2012³. It can be seen from Table 4 that the survey extrapolation appears to over-estimate the total organic land area, the organic grassland and arable crop areas but under-estimates in-conversion land. Similarly for livestock, the survey extrapolation over-estimates the amount of organic cattle and sheep but underestimates organic pig and poultry numbers. The variance in this data is probably due to the response rate, with lower pig, poultry and in-conversion numbers in the survey.

Table 4: Crop area and livestock number extrapolations

Sample size	223		
Number organic farms in England (page 8 of "Organic Statistics, 2012")	2724		
Sample percentage	8.19%		
Extrapolation factor	12.22		
Area (hectares)	Survey value	Extrapolated value	Defra "Organic Statistics, 2012"
Total organic area	39906	487463	305000
Organic grassland	29029	354597	234999
Organic arable crops	6567	80217	36806
Organic potatoes	26	317	780
Woodland	825	10083	4564
Total in-conversion area	738	9012	19000
Livestock type (number)			
Organic cattle	23845	291273	193665
Organic sheep	46899	572883	419731
Organic pigs	292	3567	29447
Organic poultry	82332	1005706	1675524

³ Defra (2013) Organic Statistics 2012 <https://www.gov.uk/government/publications/organic-farming-statistics-2012>

2.3 Geographical distribution

Figure 4 shows the geographical distribution of the farms participating in the survey. It can be seen from this that the majority of the farms were in the south-west of the country. This is as would be expected from the distribution of organic farms in England but there is a slightly lower proportion of the east of the country covered by the survey than would be the case if it was geographically representative (compare with Figure 5).

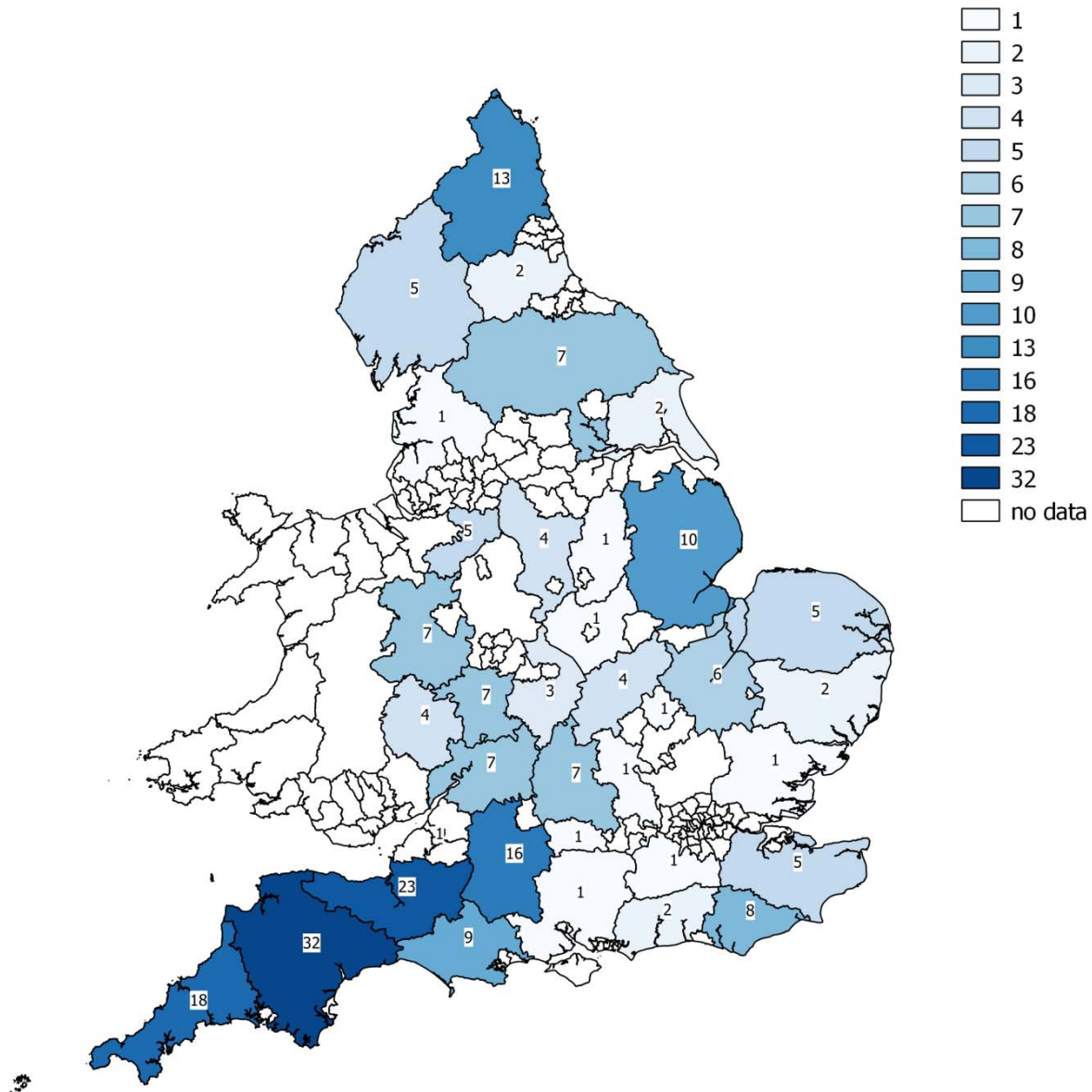


Figure 4: The geographical distribution of the final sample of responses (223) to the producer survey

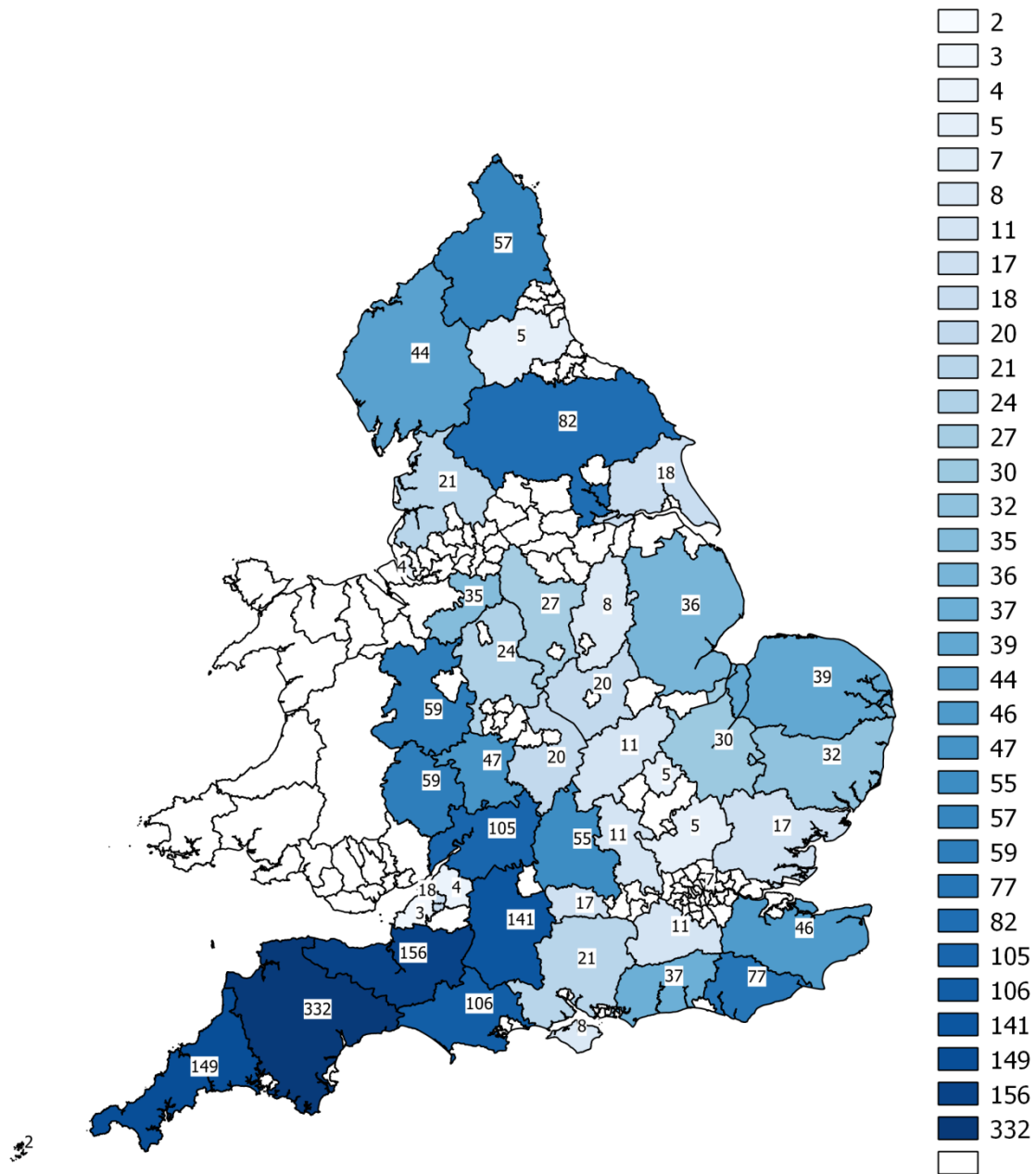


Figure 5: The geographical distribution of the OF&G and Soil Association contacts

2.4 Organic farming intentions

The producers were asked, “please indicate your organic farming intentions in the next 12 months”. Figure 6 shows that the majority (156 respondents, 70%) did not plan to make a change to their business and just under 40 planned to increase/intensify production. Those who selected “other” stated that they would: increase but not intensify production (1), revert some but not all land to non-organic (1), rent more land to an organic farmer (1), try to make the farm more viable (1), concentrate on soil health (1), may reduce production slightly if required by a new HLS agreement (1), were undecided (1).

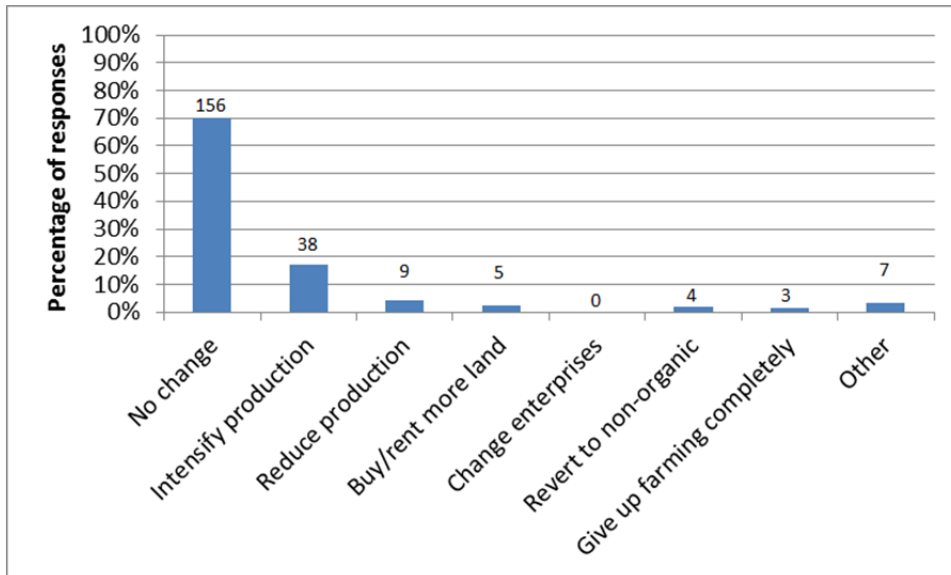


Figure 6: Organic farming intentions in the next 12 months

When asked specifically about how long they planned to farm organically the vast majority of producers confirmed that they intended to continue to farm organically in the medium to long term (Figure 7). Indeed 40% planned to continue to farm organically for 10 years or more, demonstrating the level of their commitment to organic farming. It is worth noting that many of the farmers who refused to participate in the survey were those who had or were just about to revert to conventional farming and so there may be a skew towards farmers who plan to remain organic longer.

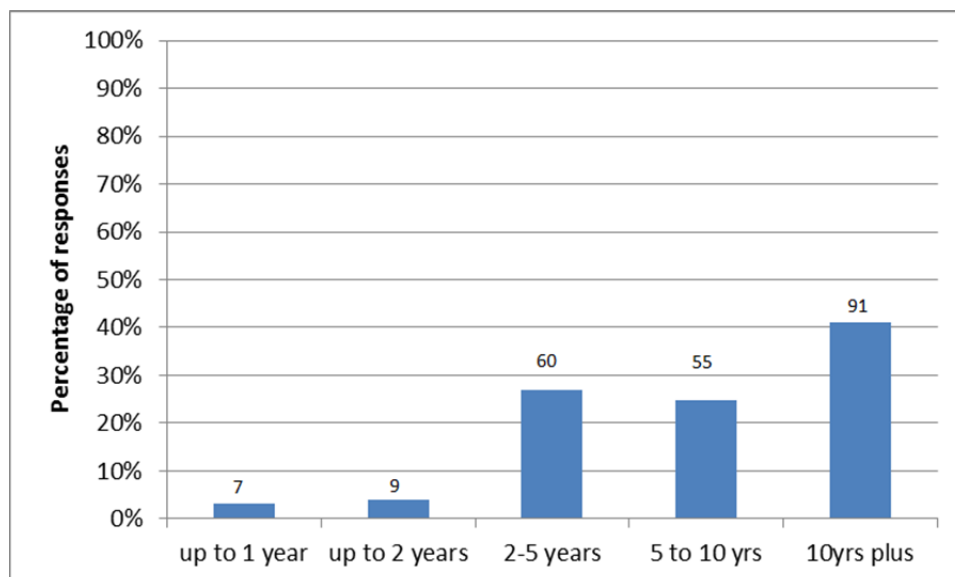


Figure 7: How long are you intending to farm organically?

The small number of producers who indicated an intention to cease farming organically within the next two years were asked to give more detail as to their reasons and these are shown in Figure 8.

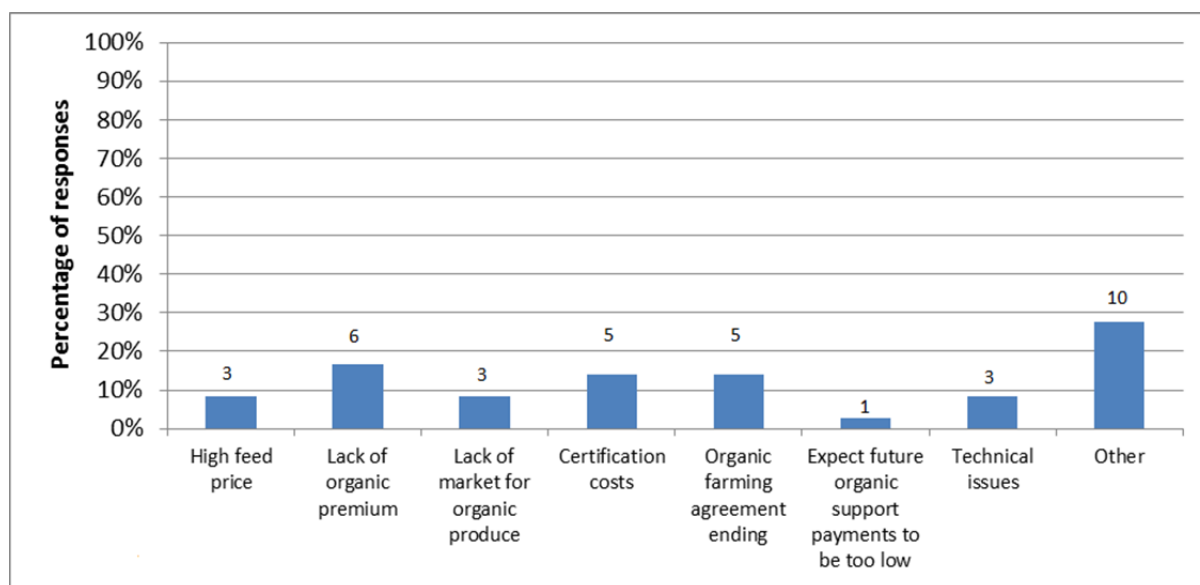


Figure 8: If you are intending to cease farming organically in the next 2 years give the main reasons

It was commented that the certification costs are high given the small premium received. Technical issues mentioned included: needing to buy in non-organic animals to a pedigree herd to improve the gene pool, issues with weeds (in both arable and grassland production), small margins, a ceiling on levels of production.

Those who selected “other” gave additional reasons including age/health/retirement, focusing on another job/role, onerous paperwork, inspection costs and a feeling of lack of support from the certification body, insufficient money, and insufficient premium (preferring to stay in environmental support schemes instead).

2.5 Agriculturally related activities

Producers were asked about agriculturally related activities taking place on their farm. As can be seen from Figure 9 there were a wide range of activities being carried out and a large number of producers have diversified into these additional activities. The “other” activities covered a wide variety including consultancy, shooting/fishing, packing, business park/events, horse livery, sales of logs, cheese making courses, growing conifers, wild bird stewardship and additional jobs such as running a veterinary practice, and being an inspector for one of the certification bodies.

Just over a quarter of the producers reported having on-farm renewables. These included solar power (PV or thermal) (44), biomass boilers (9), wind turbines (9), miscanthus (2), a borehole (1), and a ground source heat pump (1).

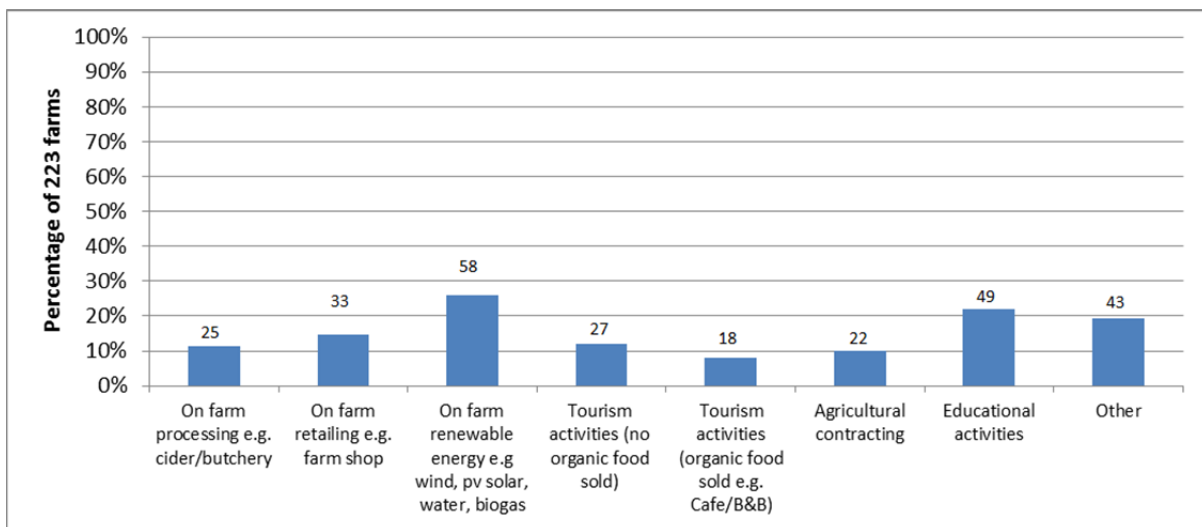


Figure 9: Agriculturally-related activities taking place

3 BEEF

119 respondents were beef producers.

3.1 Livestock sold

The producers surveyed reported sales of 3684 finished animals of which 3366 animals had organic status and 1808 store animals of which 1633 had organic status.

77% of total finished beef were sold as organic and 23% as conventional. The main reason cattle were sold conventionally was that they were in-conversion or had grazed non-organic land (12 respondents). Once these were removed from the sample the percentage of organic status animals sold as conventional decreased to 16% (see Table 2). The lack of a local market/abattoir was also an issue (5) with some producers not wishing to stress their livestock by transporting them for long distances. A lack of a premium was also mentioned (3) along with the age of the cattle (1) or TB restrictions (1).

55% of store cattle were sold as organic with 45% sold conventionally (or 39% once the in-conversion and conventionally produced animals are removed from the sample). A number of factors were responsible for the sale of organic store cattle as conventional including a lack of premium (6), being in-conversion/fed conventional feed (5), TB restrictions (4), pedigree/breeding stock being sold to those who want them due to their breeding rather than their organic status (3), and lack of local market or no desire to transport livestock over long distances (2).

3.2 Prices

The producers were asked, for both finished beef and store beef, whether they felt that current prices were sufficient for them to continue in organic production (Figure 10). There was a range of answers from 'definitely' through to 'definitely not', with the finished cattle producers showing a greater skew towards a positive answer and the store cattle producers being less sure. The additional comments made by beef producers give more detail on this suggesting that prices had fallen suddenly in the last few months of the period and so views on price may depend on when the particular producer was selling his livestock.

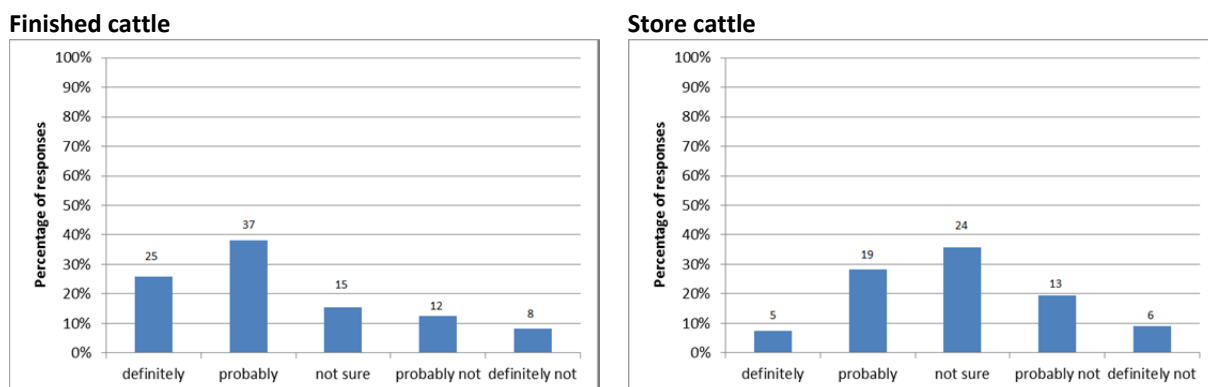


Figure 10: Is current cattle price high enough to continue organic production?

3.3 Marketing Routes

The producers were asked about the routes they used to market their livestock. Table 5 shows the number of producers stating that they used a certain route and the average (mean) percentage of their livestock sold through that route. It can be seen from these that, with the exception of direct sales to the public, most producers appear to use one route almost exclusively (most of the mean percentages are at 90% or above) with very small percentages of their livestock being marketed in alternative ways. The majority of finished livestock producers sold direct to the abattoir and the majority of store producers made their sales at livestock markets.

Table 5: Routes to market for finished beef and store cattle.

	Finished direct to abattoir	Finished producer group	Finished livestock market	Finished direct sales to public	Store producer group	Store livestock market	Store direct to producer
Number of respondents	61	11	8	15	8	26	18
Mean percentage	94	91	88	50	89	93	93

3.4 Production intentions

The majority of beef producers planned to remain at similar livestock numbers in the next two years, with slightly greater numbers intending to expand rather than reduce their production (Figure 11).

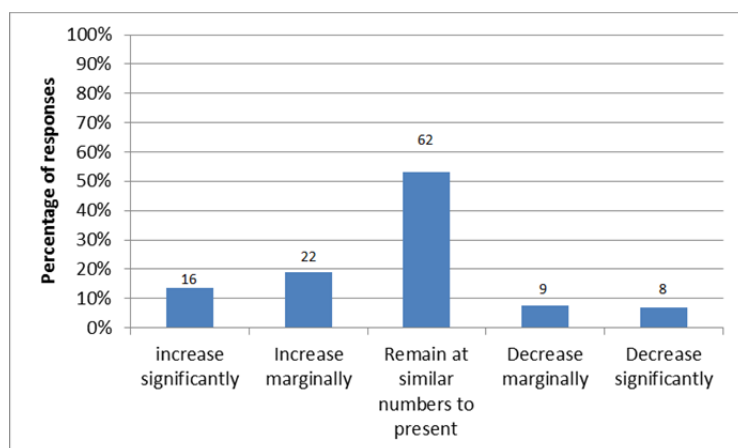


Figure 11: How do you expect numbers of finished/store organic beef cattle to change over next 2 years?

3.5 Additional producer comments

The producers were asked whether they had any additional comments on organic beef production. (received from 84 of the 119 beef producers) The comments, presented as reported by the interviewers, represent a wide range of thoughts and opinions.

Fifteen farmers indicated that they were farming organically for conservation reasons and/or as part of the HLS (Higher Level Stewardship) scheme. This approach was summed up by one farmer who explained that he “*farms organically for the environment and for his cows*”. However, some of the farmers who indicated that they were participating in HLS or OELS (Organic Entry Level Stewardship) also mentioned that they

needed to be in these schemes to fund their organic production: One interviewer said of a farmer they surveyed, *"If there is no payment from HLS he will probably come out of Organic but continue to farm in an environmentally sustainable way. He could not afford to stay in Organic"* and another interviewer said of another farmer *"have been organic for over 25 years. Organic farming alone does not pay as relies on having HLS or environmental scheme to make up the short-fall. Being organic is a "fundamental principal", to them it's a fantastic thing BUT If he was starting now would label himself as a "Traditional Farmer" or an "Ecological farmer" or a "Green farmer"."*

With regards to costs a few producers indicated that they felt that organic feed prices are too high at present.

TB was also causing concern for some farmers with the restrictions it imposed, the amount of paperwork and the fact that organic reactors receive the same level of compensation as conventional reactors thus losing the organic premium.

With regards to prices for organic beef some producers were very happy with the price they had received whereas others were unhappy. A few producers stated that *"The price WAS good in the summer but its falling quickly"* with several mentioning that the price was dropping badly in the last three months covered in the survey (August, September and October 2013) and that it was getting difficult to sell with some of the main buyers not willing to purchase at all. Two of the producers suggested that this drop in demand (and therefore price) was related to increased imports from Ireland in that period. A few producers also mentioned that there is no consistency in beef prices and *"that more market intelligence is needed in the Organic Beef sector, producers are unsure if they really are getting the best price, just have to trust them (the buyers)."* In an extension of this concern about market intelligence, one producer said that he *"thinks that the organic farmers should get together in local groups and discuss the market between them, says that there is a job for the certification bodies and ORC to get people together."*

4 SHEEP

89 respondents were sheep producers.

4.1 Livestock sold

The producers surveyed reported sales of a total of 26,916 finished sheep of which 25,399 had organic status and 7686 store sheep of which 7506 had organic status.

59% of finished lamb was sold as organic and 41% was sold as conventional (37% if in-conversion and conventionally reared livestock are excluded from the sample so that only organic status lamb in considered, see Table 2). The organic lamb producers were more likely than organic beef producers to have sold as conventional due to a lack of premium (16) although some commented that this was partly due to an improvement in the conventional price of lamb. The lack of local abattoirs (8) or local markets (8) was also a factor in the conventional sales and, again, some producers were selling as conventional because they were still in conversion (6). The comments of one of the producers summarise the reason for selling finished lamb as conventional, *“at the moment the price of organic lamb isn't much more than the conventional price; no local organic abattoir, so transport costs not worth it and want to minimise time between leaving the farm and slaughter (for welfare concerns).”*

49% of store lamb was sold as organic and 51% was sold as conventional (50% when in-conversion and conventionally reared livestock are removed from the sample, see Table 2). As with the finished stock, store lambs were mainly being sold as conventional due to a lack of organic premium (6) with a lack of local organic markets (3) as an additional reason. One producer was in-conversion and one had sold organic pedigree lambs to a conventional producer who wanted the breed.

4.2 Prices

Compared with beef prices there was a greater level of doubt about the ability of lamb prices to support continued organic production. Both finished and store producers were unsure or negative about current prices (Figure 12).

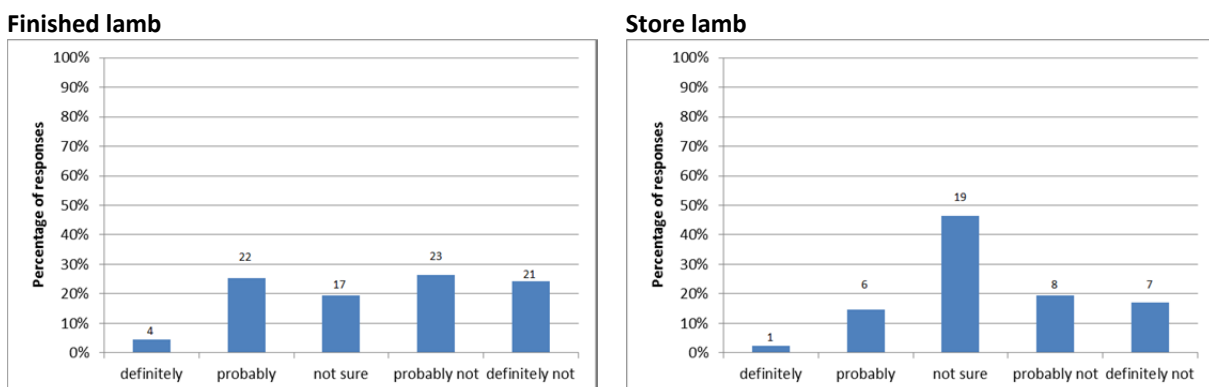


Figure 12: Is current lamb price high enough to continue organic production?

4.3 Marketing Routes

The majority of producers sold their finished lamb direct to an abattoir (Table 6), although many preferred to sell via a livestock market and a number carried out some direct sales. The majority of store lamb was sold directly to another producer for finishing, although livestock markets were also used. Store lamb

appeared to be sold almost entirely by one chosen route whereas there were lower percentages for finished lamb being sold direct to the public and via producer groups suggesting that individual producers may use more than one route when marketing finished lamb.

Table 6: Routes to market for finished lamb and store lamb

	Finished direct to abattoir	Finished producer group	Finished livestock market	Finished direct to public	Store producer group	Store livestock market	Store direct to producer
Number of respondents	41	11	27	20	0	9	12
Mean percentage	84	62	78	58	Not applicable	92	96

4.4 Production Intentions

The majority of lamb producers intended to retain similar livestock numbers in the next two years (Figure 13).

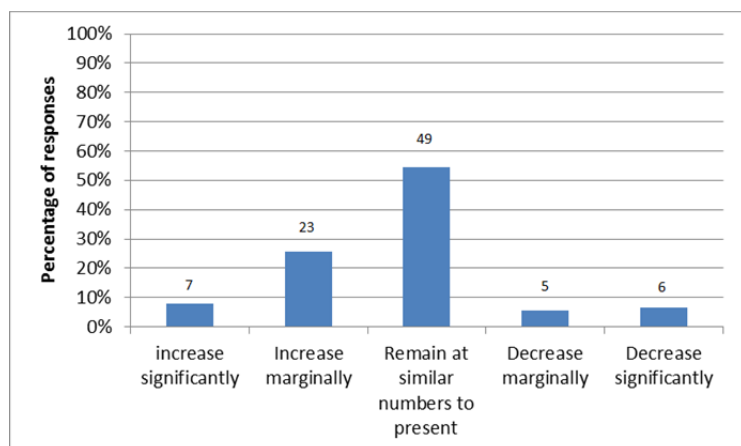


Figure 13: How do you expect numbers of finished/store organic lambs to change over next 2 years?

4.5 Additional producer comments

Additional comments were received from 69 of the 89 sheep producers and are presented as reported as by the interviewers. The additional comments on lamb production were much more consistent than those for beef production. Although a few producers expressed a belief that prices were good and that sheep farming was working well for them, the vast majority expressed feelings of dissatisfaction with the current state of organic lamb production. Many (18) felt that there was a lack of premium, in some cases due to a lack of demand in the market, and that *“organic certification is too expensive for the returns”*. One producer stated that *“organic lamb production is totally unsustainable. The seasons of the Severely Disadvantaged Area (SDA) have changed: bad winters and cold slow spring. Costs of organic feed are prohibitive”*. These issues appeared to have been exacerbated for some producers by the bad weather which resulted in poor lambing and issues with worms and fluke. One farmer summarised his views on organic sheep farming stated that he was *“generally quite disgruntled with the organic certification and market... Says there should be a good market for local organic produce but the cost of certification for small shops and markets was causing them not to bother and just market as local and fresh”*. Another producer was more blunt, simply saying *“you're a mug being in organic sheep production really”*.

5 PIGS

13 respondents were pig producers.

5.1 Livestock sold

The survey respondents reported sales of 181 finished pigs of which 159 had organic status and 175 store pigs of which 25 had organic status.

52% of finished pigs were sold as organic and 48% as conventional (Table 2). In contrast to finished lamb which was sold as conventional in similar proportions, the premium was not an issue for organic pig production. The main reason for sale as conventional was being in-conversion or producing the pigs conventionally (on an otherwise organic farm). When these are removed from the sample the proportion sold as conventional drops to 41%. The farmers producing the pigs conventionally mentioned doing so due to high organic feed costs. One producer also mentioned a lack of certified processing facilities and another that he farms the pigs as a hobby and so hasn't tried to market them as organic.

11% of store pigs were sold as organic and 89% were sold as conventional almost entirely due to being reared conventionally (Table 2).

5.2 Prices

As for beef and sheep production, there was greater uncertainty as to whether the store price was sufficient to support continued organic production with more definite responses being given with regards to the finished pig price (Figure 14). Some producers felt that the finished price was probably sufficient but others felt that it was definitely not high enough to continue organic production.

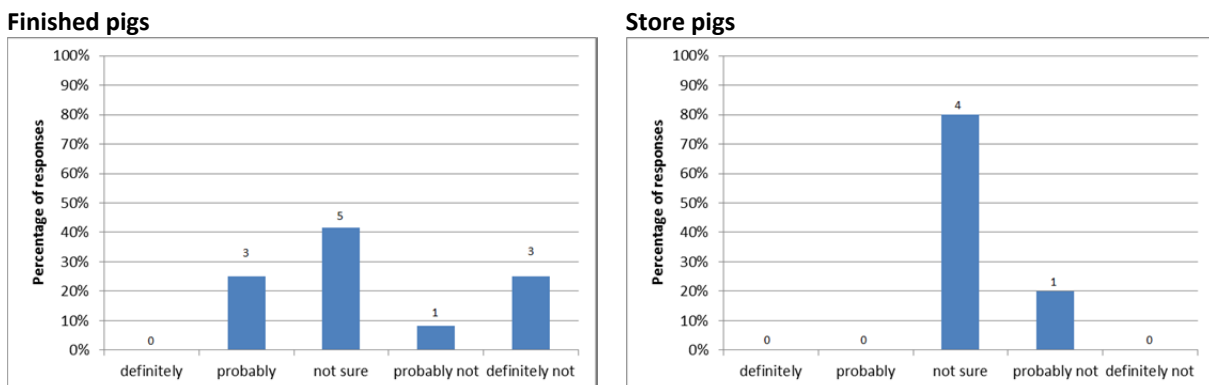


Figure 14: Is current pig price high enough to continue organic production?

5.3 Production Intentions

The majority of organic pig producers intend to maintain livestock numbers at current levels over the next two years (Figure 15).

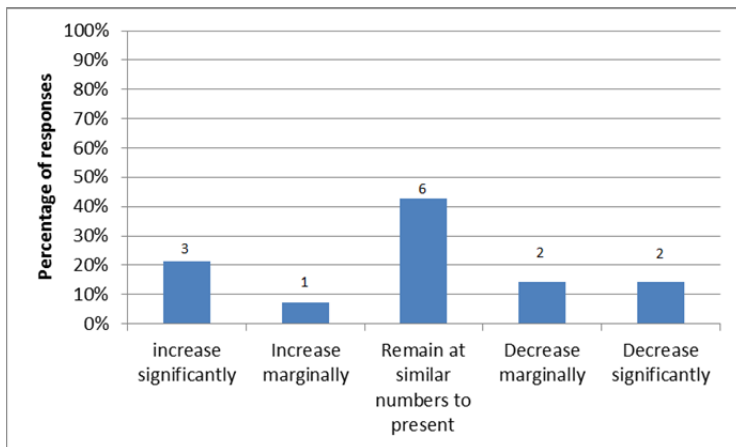


Figure 15: How do you expect numbers of organic pigs to change over next 2 years?

5.4 Additional producer comments

Of the thirteen pig producers who were interviewed nine made additional comments which are presented as they were reported by the interviewers. The main topic brought up when asked for additional comments on organic pig production was the cost of organic feed, although one producer did point out that he felt that both organic and conventional pig feed were too expensive.

Two producers stated that they kept pigs mainly as a hobby and two more stated that they keep them because they have tourists on farm who enjoy seeing them. It appeared that many of the producers were involved in direct sales of their pork.

6 BROILERS

Six of the respondents produced broilers.

6.1 Livestock sold

The producers surveyed reported sales of 144,550 birds.

93% of broilers were sold as organic and 7% as conventional (Table 2). Only one of the producers interviewed had sold organic broilers as conventional. They cited lack of market demand as the reason for this.

6.2 Prices

Only a small number of broiler producers were interviewed in the survey but of those the majority felt that the price was sufficient to support organic production (Figure 16).

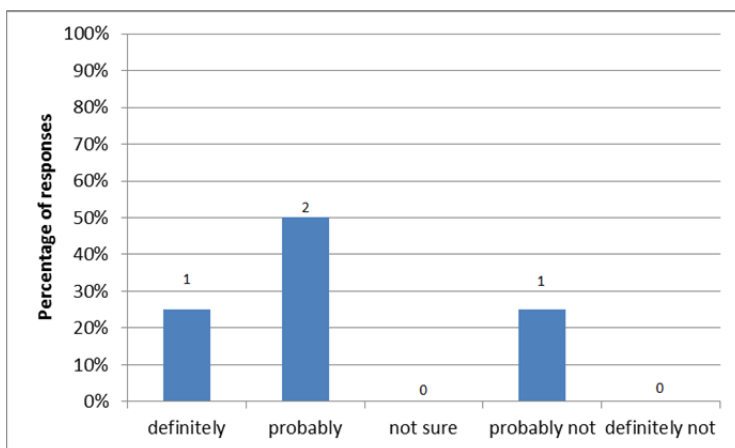


Figure 16: Is current broiler price high enough to continue organic production?

6.3 Production Intentions

The majority of broiler producers intended to keep livestock numbers at similar levels in the next two years (Figure 17).

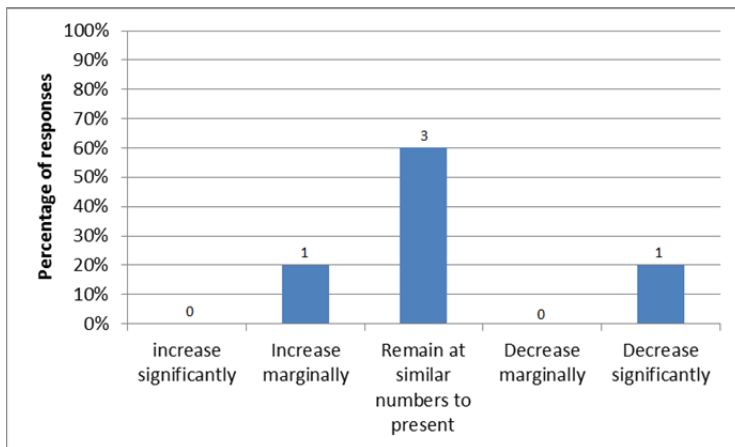


Figure 17: How do you expect numbers of organic broilers to change over next 2 years?

6.4 Additional producer comments

Very few broiler producers were surveyed and so there were few comments (although five out of the six producers made comments) and those that were made mainly concerned the market: lack of demand, uncertainty about the market, concerns about supermarket control of pricing and how it affects sales. One producer also mentioned that broiler production is quite labour intensive and that they have had to buy in some feed (although they grow their own oats).

7 MILK

46 of the respondents were milk producers.

7.1 Produce sold

The total amount of milk sold by the survey respondents was reported as 33,300,200 litres.

98% of milk was sold as organic and only 2% was sold as conventional (Table 2). The conventional sales were due to in-conversion status or a contractual agreement.

7.2 Prices

The average (mean) milk price was 35.04ppl (ranging from 30ppl to 40ppl) with many producers reporting an increasing price over the period covered by the survey (1st November 2012-31st October 2013).

This improving situation with regards to the milk price was reflected in the positive answers to the question regarding whether the organic milk price was sufficient to continue in organic production (Figure 18).

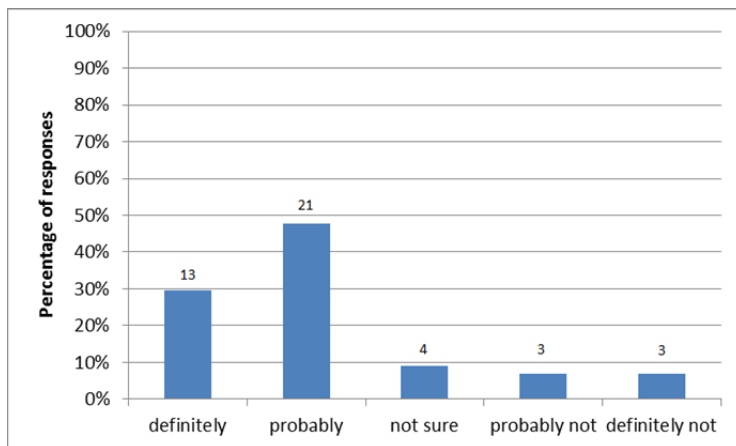


Figure 18: Is current milk price high enough to continue organic production?

7.3 Production intentions

The more positive attitude to organic dairy farming is also reflected in the number of producers indicating a desire to increase production in the next two years (Figure 19).

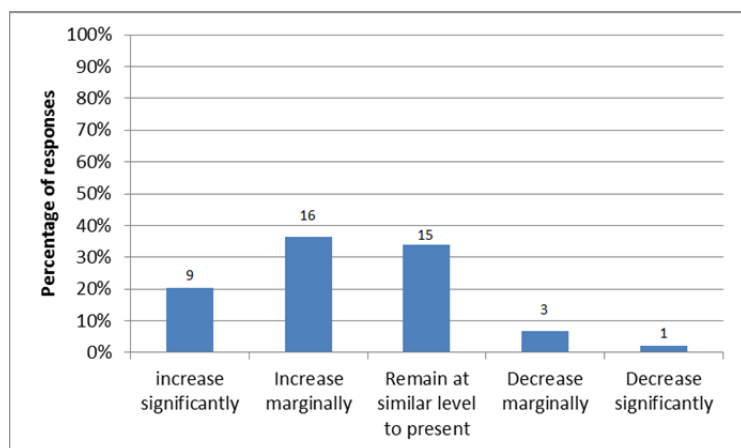


Figure 19: How do you expect amount of milk produced to change over next 2 years?

7.4 Additional producer comments

Of the 46 milk producers who took part in the survey 35 made additional comments that were recorded by the interviewers. The additional comments on organic dairy production reflected a feeling of cautious optimism among producers based on the fact that the price had increased in the year. A few producers felt that their price was still too low but most felt that things were improving. One producer stated that *“the milk price is becoming more realistic and a change is round the corner as it’s a question of supply and demand”* and similarly another said that *“there has been a national loss of producers which may be helping the price”*. The general feeling seemed to be that milk supply and demand were becoming more balanced and that previous issues with over-supply were being resolved as some producers had moved out of the organic milk market.

However, despite the improving situation there were also concerns about rising prices of feed and other inputs, *“he is fairly happy with the price but it depends on what happens to the costs of inputs. Everything else is rising in cost: electric, water, fuel and labour. He uses quite a lot of concentrate which is expensive”*. Several producers also pointed out that the price is not high enough to support reinvestment and that there is *“some catching up to do”* with regards to this. Three of the farmers made estimates of the level of milk price that they would like to see to allow them to cover costs and reinvest in the business and these estimates were very consistent, all three suggesting that 50-55ppl would be required.

A small number of producers mentioned that they either sold their milk for cheese or processed it themselves and one used their organic milk to produce conventional ice cream for direct sales.

8 EGGS

16 of the respondents were egg producers.

8.1 Produce sold

The producers surveyed reported sales of a total of 706,688 dozen eggs.

Virtually all eggs (99.6%) were sold as organic and only 0.4% were sold as conventional (Table 2). Only one producer had sold eggs as conventional and they explained that, as they sell directly to consumers, they don't sell as organic.

8.2 Prices

The average (mean) price per dozen eggs was £3.57 (ranging quite substantially from £1.60 to £8.30). Most producers were definite that the price was sufficient to continue in organic production (Figure 20) although there were other producers who felt that it definitely was not. This wide range of definite opinions may be partly due to the wide range of prices being obtained.

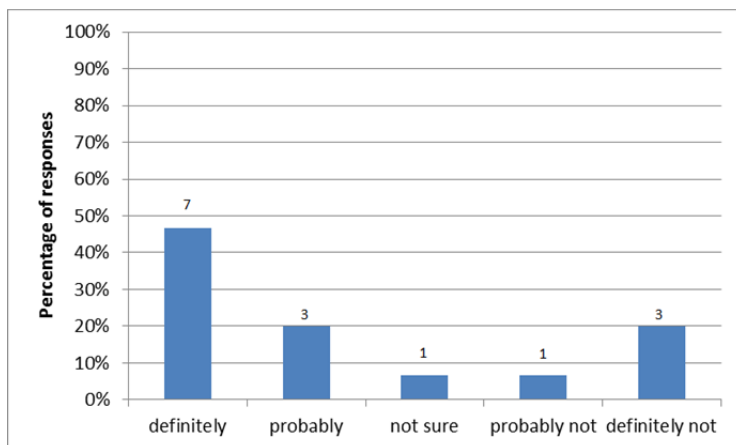


Figure 20: Is current egg price high enough to continue organic production?



8.3 Production intentions

The majority of producers intended to maintain livestock numbers in the next two years (Figure 21).

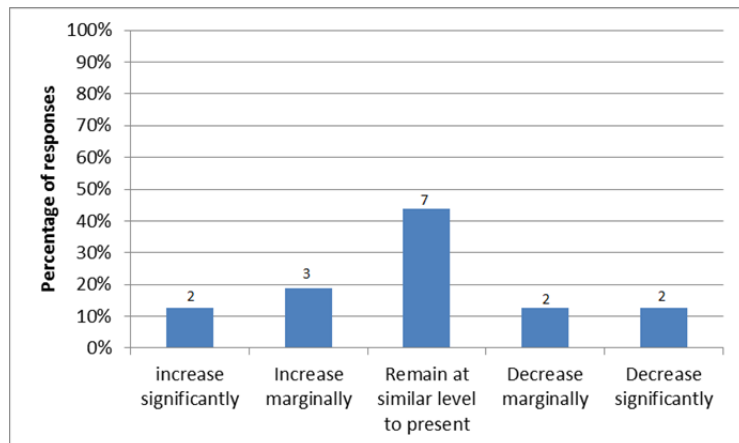


Figure 21: How do you expect amount of eggs produced to change over next 2 years?

8.4 Additional producer comments

Of the 16 egg producers 10 made additional comments. There were mixed feelings about organic egg production represented in the comments made by producers. A number of producers commented that the price of feed was high, one commenting that because of this they have insufficient money to invest in the enterprise and therefore cannot expand. Some of the producers felt that the price of eggs is currently insufficient to meet the costs of production.

However, other producers were more optimistic with some pointing out that *“there is a demand as quite a few of the larger organic producers seem to have given up”*. This suggests that the balance between supply and demand may also be equalising and resulting in a more promising situation for the remaining producers.

9 ARABLE

69 respondents produced arable crops.

9.1 Production

Table 7 shows the yields for a range of organic arable crops based on taking the reported production in tonnes (where such a value was given) divided by the area in hectares. It can be seen from this that there was a great deal of variation in the yields obtained.

Table 7: Yields for a range of arable crops (calculated as production in tonnes divided by area converted to hectares).

	Wheat (feed)	Wheat (milling)	Barley (feed)	Oats (feed)	Oats (milling)	Triticale	Beans
Number of respondents	19	9	30	17	9	5	11
Mean yield (t/ha)	4.44	3.56	3.68	4.94	3.90	3.70	3.18
Minimum yield (t/ha)	1.62	1.48	0.79	0.99	2.19	2.00	0.06
Maximum yield (t/ha)	9.14	4.82	9.88	14.83	5.39	7.41	9.18
Reported total produced (tonnes)	3443	1896	2368	5083	2131	522	766
Reported sales volume (tonnes)	2527	1208	1013	4161	1142	225	692

9.2 Prices

Table 8 summarises the prices obtained for a range of organic arable crops. It shows the mean prices per tonne and also the range. In general the specific comments on the prices were that they are too low.

Table 8: Prices (£/tonne) for a range of arable crops.

	Wheat (feed)	Wheat (milling)	Barley (feed)	Oats (feed)	Oats (milling)	Triticale	Beans
Mean price (£/tonne)	249	275	218	223	241	217	295
Min price (£/tonne)	200	250	150	180	202	150	263
Max price (£/tonne)	290	300	250	260	270	250	320

44% of producers who answered the question (Figure 22) thought that the organic grain price was high enough to continue in organic production (probably or definitely) and only 24% thought that it was insufficient (probably or definitely). However, farmers who did provide comments on the specific prices mainly said they found them too low.

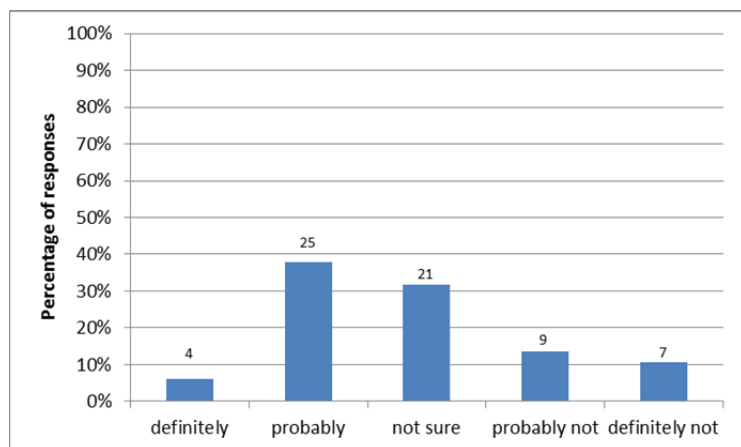


Figure 22: Is current organic grain price high enough to continue organic production?

9.3 Marketing routes

Table 9 summarises the routes to market for various organic arable crops. It can be seen from this that organic arable producers use one route for their entire crop (all of the mean percentages are 100%). It was also clear that the majority of the producers sell to bulk buyers.

Table 9: Routes to market for organic arable crops

		Sales route (% of value) direct to another farmer	Sales route (% of value) direct to a processor	Sales route (% of value) bulk buyer
Wheat (feed)	Number of respondents	2	5	10
	Mean percentage	100	100	100
Wheat (milling)	Number of respondents	0	3	5
	Mean percentage	Not applicable	100	100
Barley (feed)	Number of respondents	3	4	6
	Mean percentage	100	100	100
Oats (feed)	Number of respondents	2	3	4
	Mean percentage	100	100	100
Oats (milling)	Number of respondents	0	2	6
	Mean percentage	Not applicable	100	100
Triticale	Number of respondents	1	1	3
	Mean percentage	100	100	100
Beans	Number of respondents	2	1	6
	Mean percentage	100	100	100

9.4 Production intentions

The majority of organic arable producers expect their production level to remain the same over the next two years (Figure 23).

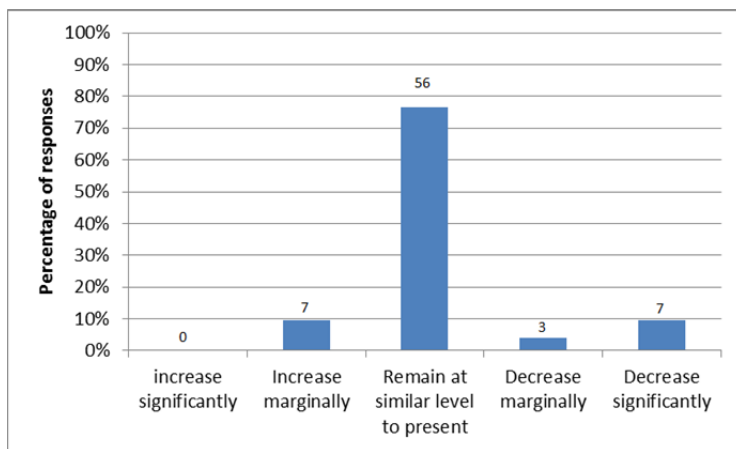


Figure 23: To what extent do you expect your organic arable production to change over the next two years?

9.5 Additional producer comments

Of the 69 arable producers who were interviewed, 51 made additional comments. Some of the arable farmers commented that the period covered by the survey made it difficult for them to answer the questions, *“The period between 1st November 2012 - 31st October 2013 was a little difficult for the farmer as she mainly sells last year’s summer harvest in the following February. It may affect the calculations in this case. So the production amounts are for the period requested (mainly this summer) and therefore not yet sold. The sales correspond to last year’s harvest (yet sold this year). Sales do not match as they are from different harvests.”*

With regards to comments on organic arable production, there was a mixture of opinions.

Some farmers were producing arable crops because they felt that they fitted with organic systems in general, *“Grows cereals as it fits his rotation. Thinks he should grow cereals to keep self-sufficient and a closed system”* or enjoyed the challenge it posed, *“He thinks that stockless arable as a system can work well in the East, it’s fairly reliable and he likes the challenge of farming it organically”*. Some felt that organic arable farming *“Does not stack up. Just have the cereals so that it helps with the rotation and uses the nutrients”*. Other farmers felt that they had a system that was working for them, *“He is happy he has got organic cereal production right after 12 years. Is on quite heavy wold land running to ironstone on one side of the estate. He plays with the seed rate to suppress the weeds. 200 acres is under-sown to get back into clover leys”*.

However, many farmers were finding the challenges of organic arable farming difficult to deal with: *“He believes that the price of organic cereals really needs to be DOUBLE the conventional price (“at least”) to make up for the yield reduction and that does not include the lack of income in the fertility building phase of the rotation”*. These challenges were exacerbated by the weather conditions in the growing season: One interviewer reported of a farmer, *“In a normal year would grow 8 acres of spring barley under-sown with clover ley however too wet in spring 2012 to plant.”* Another interviewer reported on another farmer, *“He lost all his conventional cereals due to wet winter 2012. Would not attempt organic cereals on his very*



heavy soil type - window of opportunity too small to weed control etc.", and with regards to a further farmer, *"the organic arable is far more weather dependent than other enterprises, and fluctuation is great in outputs"*.

There were also a number of comments about the (low) prices that were being achieved and the market for organic arable products: *"when I started organic farming in 1999 organic cereals were worth twice of conventional cereals. I'd like to see this come back"*, and *"marketing of organic arable commodities is volatile, fragmented and non-transparent, can be made more transparent."*, and from another farmer, *"The farm is reverting to conventional after 27 years as organic because of a lack of market and a lack of organic premium"*.

Some producers suggested approaches to the current market situation such as concentrating on niche products, *"Barley price not high enough for organic production, speciality crops (spelt and einkorn) work better"*. Other producers suggested ways in which the market needs to change, *"need to incorporate better structure for pulses; undervalued because price doesn't take into account extra risk in organic production, so little production in UK and must import a lot"*

A comment which seems to sum up how many of the producers felt was *"He said from his experience it would be better to take the money, fly to Vegas and put it on at a casino. It's (organic arable production) a lottery with prices and yields. However, even if he was not organic he would farm in a low input way."*

10 FRUIT AND VEGETABLES

41 of the respondents produced fruit or vegetables. Sales volumes were not recorded due to the varying weights of the products sold.

10.1 Prices

The majority of horticultural producers felt that organic fruit and vegetable prices are sufficient to support organic production (Figure 24).

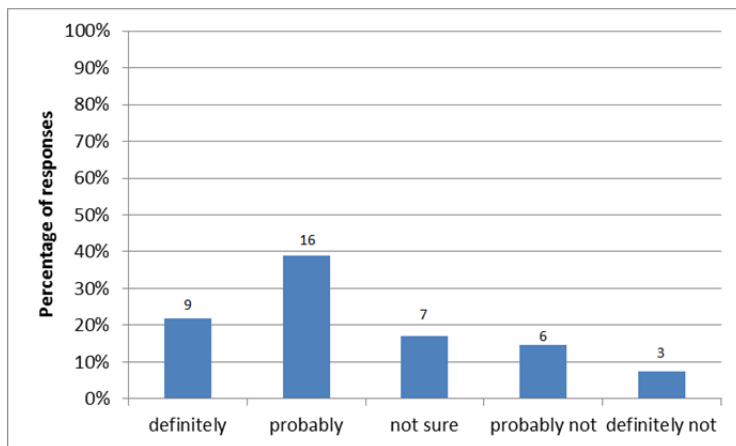


Figure 24: Is current organic fruit and vegetables price high enough to continue organic production?

10.2 Marketing Routes

Routes to market are more complex for organic horticultural production than for organic arable production (Table 10). Individual producers appear to use more than one marketing channel for their produce and will split produce between sales routes.

10.3 Production intentions

A large number of organic horticultural producers (47%) are planning to increase production in the next two years and only 8% plan to decrease production (Figure 25).

10.4 Additional producer comments

Of the 41 fruit and vegetable producers, 38 made additional comments. The organic horticultural producers shared some concerns, such as whether the price was sufficient to support production and cover increasing costs of fuel, energy, administration etc., with other organic enterprises. Similarly to the arable growers they also mentioned that production is weather dependent and that recent weather had not been favourable.

Table 10: Sales routes to market for organic horticultural crops (% of value)

		Direct to public	Wholesaler/ retailer	Packer/ processor
Mixed market garden	Number of respondents	6	7	1
	Mean percentage	83	41	100
Potatoes (ware)	Number of respondents	4	2	2
	Mean percentage	81	33	100
Field vegetables	Number of respondents	7	8	6
	Mean percentage	81	43	83
Salad & protected cropping	Number of respondents	8	5	2
	Mean percentage	72	37	46
Top fruit	Number of respondents	4	7	4
	Mean percentage	71	59	64
Soft fruit	Number of respondents	3	3	1
	Mean percentage	65	45	25

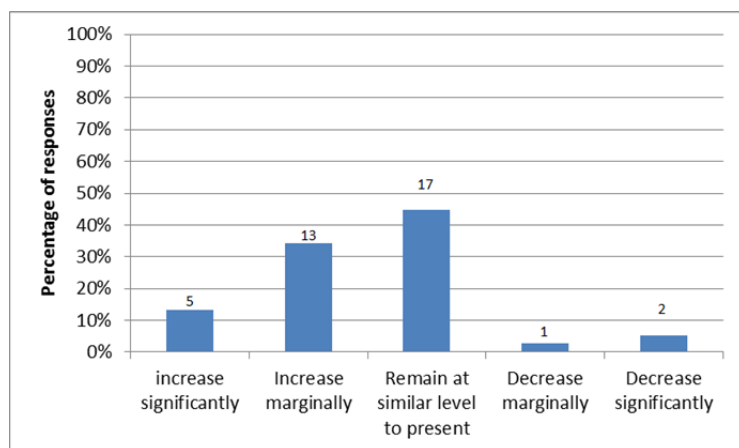


Figure 25: How do you expect amount of fruit and vegetables produced to change over next 2 years?

However, other concerns that were raised differed from the additional comments made for other enterprises. Perhaps as a result of the fact that more of the horticultural producers sold directly to the public, many of their concerns were centred around consumer perceptions and how best to market their produce to consumers. One producer pointed out that *“in organic farming, it is difficult to guarantee standards (e.g. may be slug damage) and selling into a market that has pesticide-applied produce, consumers have certain expectations but we need to educate them about what they should expect from organic produce”*. There were also concerns about consumer perceptions with regards to the cost of organic produce, *“he thinks that selling as Organic puts a lot of people off as it is perceived as being too expensive (in reality food is too cheap)”* and consumer confusion as to what organic means and how they can tell whether produce is organic, *“there is customer confusion between local and organic. If food is produced locally it is assumed organic, which is exploited by local non-organic producers”*.

Some technical issues were raised: e.g. the need to keep up the vigour of organic varieties and issues with costly alternatives to peat. There were also positive comments about organic horticultural production techniques, *“he has noticed that the principals of organic production are being adopted by many of the better conventional growers... One of his organic and conventional customers is getting HIGHER yields on his organic area than the conventional area just because of the management... on the whole he thinks that there is a future in organic”*.

11 OTHER PRODUCTS

19 respondents produced other products not covered in the previous sections of the survey.

11.1 Production

Other organic products that were produced by the farms participating in the survey included, apple trees, turkeys, dairy products (cheese, yogurt, butter), buffalos' milk, goats' milk, apple juice, wool, throws and blankets, alpaca yarn, thatching straw (the producer states that thatchers prefer it because organic is better quality) , hay and/or silage.

11.2 Prices

Two respondents felt that the price of their product was definitely sufficiently high; eleven felt that it was probably sufficiently high and four were unsure. This is a more positive response than was received for the more standard enterprises covered elsewhere in the survey and probably reflects the fact that these more unusual, niche products are targeted by these producers because they are able to be profitable and have higher market demand because they are less common.

11.3 Additional producer comments

Of the 19 respondents who produce other products, 13 made additional comments that were recorded by the interviewers.

One of the turkey producers commented that "they will remain organic as long as there is demand AND premium. Concerned that if they were forced to feed a 100% organic ration that they wouldn't be able to source it as the feed suppliers say it can't be done. Finding that last 5% organic part of ration will be very expensive... Organic needs to have a "point of difference" than other production methods BUT need to be practical with the standards as it will become uncompetitive against other welfare friendly systems. A balance is needed".

One of the other producers mentioned that "the challenge is marketing, at the very beginning. It would be helpful to have more info on meaning of "organic in UK" translated into different languages, Scandinavian languages, versus Bio or Eco"

12 DIRECT SALES

61 of the respondents were involved in direct sales to some extent.

12.1 Sales

The majority of the producers selling directly reported that the main content of their direct sales was meat (Figure 26) although this may be a reflection of the fact that the majority of the survey respondents were meat producers.

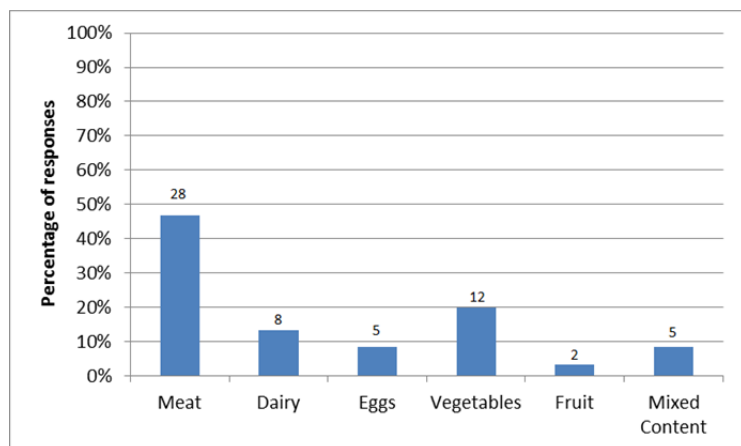
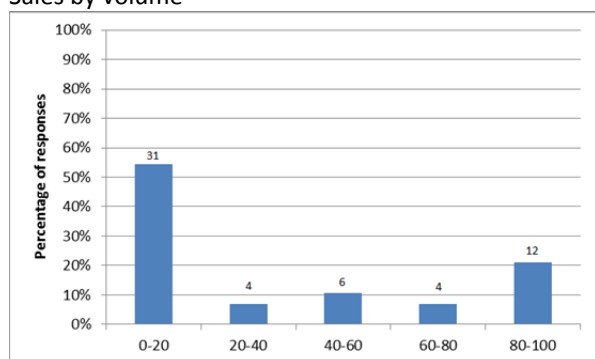


Figure 26: Please indicate the main content of your direct sales

For the majority of the producers, direct sales make up a small proportion (less than 20%) of their total sales. However for just over 10 producers, direct sales make up most (80-100%) of their sales (Figure 27). Five of these (six if considering sales by value rather than by volume) sell meat, Four sell vegetables, one sells dairy products, one makes mixed content direct sales and one didn't specify the products sold.

Sales by volume



Sales by value

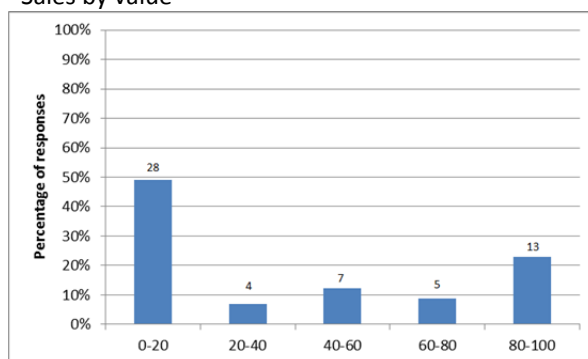


Figure 27: Approximate percentage of direct sales of total sales

For most of the producers, sales have remained steady in the past year, however 18 producers reported that sales had increased by more than 10% (Figure 28). For some of those who reported large increases in sales this was because they had started direct sales relatively recently and were growing this aspect of their business.

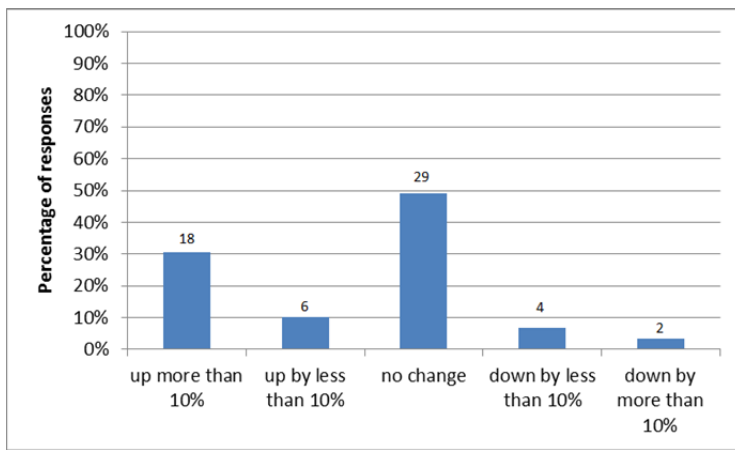


Figure 28: How have direct sales changed during the last year?

12.2 Prices

In general the producers were optimistic about the prices they were receiving through direct sales and the probability that these would allow them to continue with organic sales into the future (Figure 29).

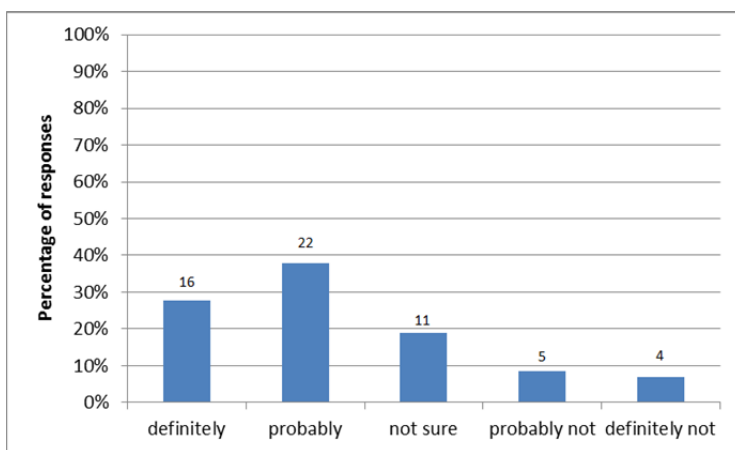


Figure 29: Is current price (direct sales only) high enough to continue to sell organically?

12.3 Marketing routes

Farm shops and box sales/online/mail order schemes were used by a number of producers, but most producers used more than one route for their direct sales (Table 11). Other outlets included: pubs, shops, hotels, restaurants, farm gate sales (but no farm shop), specialist shows, local community, friends, contacts via e-mail and twitter, National Trust, staff and volunteers, local grocery, local abattoir, stock sales, and wholesale.

Table 11: What proportion of sales (by value) are through the following outlets?

	Farmers' markets	Farm shop	Box sales/online/mail order	Other
Number of respondents	16	23	25	24
Mean percentage	42	58	71	69

12.4 Constraints

The two main logistical problems highlighted were remote locations for farm shops or farm gate sales and high transport costs for those farmers that were taking their produce to the consumers (Figure 30). Other constraints that were mentioned included the difficulty of running a farm and trying to market the produce, the need to produce more to meet demand (coupled with difficulties such as an inability to buy more land or hire more labour), high price of feed for egg production, and lack of a local supply chain (no local abattoir or butcher). The most commonly mentioned other constraints were a feeling that organic food is not as popular with consumers and competition from supermarkets and also from producers, butchers, and grocers selling produce as local or traditional.

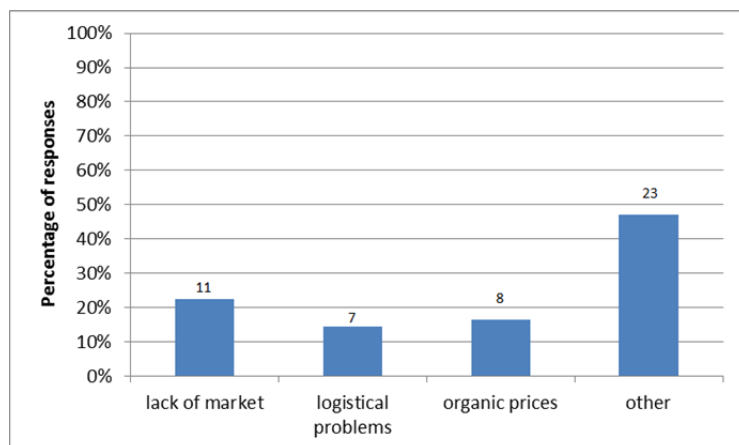


Figure 30: What do you think is the main constraint to your direct organic sales?

12.5 Additional producer comments

Of the 61 producers who were involved in direct sales, 30 made additional comments. The additional comments about direct sales suggests that they are hard work, especially on top of running a farm, but a valuable opportunity to make contact with customers. However, just being organic does not seem to be sufficient to sell the product with several producers emphasising the need for a good quality product.

One producer commented that they *“have tried to sell in farmer’s market, but it’s another job, difficult to do this as well as farm, and need to make a large profit to make hiring someone to do it worthwhile”*. However those who have had direct contact with customers suggest that *“it is very enjoyable to do, although difficult to come out of your shyness”*. It is suggested that farm shops and markets may be a preferable route to restaurants and cafes because *“a change of chef could mean they stop buying products from the same place”*.

Some producers mentioned issues with the market such as *“limited market in rural areas, urban people more open to organic produce and have more money, but not necessarily to do with income; older people/people with children usually more interested”*. Other producers emphasised the importance of other issues in marketing their produce: *“customers not really interested in it being organic or not. It’s more the local and sustainability issues; also a good product”* and *“I think organic standards should include some reference to food miles and some reference to packaging levels and quality i.e. plastic”*.

However, some of the producers are very positive about direct sales despite the above constraints, *“I wish we could do more, direct sales are the way forward”*

13 EXPORT OUT-WITH THE EU

Very few producers had been involved in export out-with the EU. One producer has exported bull semen to Brazil, Chile, New Zealand and other countries but cited animal health restrictions as a possible constraint on exports. Another had tried to export two rams but was discouraged by the amount of paperwork required. A few organic milk producers mentioned that Arla exports milk out-with EU but they were unaware whether or not their own milk was exported.

14 CONCLUSIONS

Overall, the majority of English organic producers surveyed intend to continue farming organically. They indicated that they farm in this way for their livestock and for the environment but profitability may not be sufficient to cover rising costs and allow re-investment in their business. However, many commented that they would still farm in a low-input or environmentally friendly manner if they were not organic. Some producers also expressed a desire for more market information and greater market transparency and it is hoped that the survey and this report represent a first step towards this.

APPENDIX I: DATA COLLECTION AND ANALYSIS

Given the large number of organic producers in England (2589 producers and 135 producer/processors according to Defra's "Organic Statistics 2012 United Kingdom" publication) it was decided to survey only a sample of the producers. To this end, contact lists were obtained from the Soil Association and OF&G. These totalled to just over 2,000 producers. An initial sample of 1,000 was then selected at random. These producers were contacted by letter to inform them that the survey was taking place. The surveys were then carried out by telephone in November and December 2013 by seven members of casual staff employed by ORC. The interviews took between half an hour and just over an hour and Excel spreadsheets were used to record the answers. The full list of survey questions is given in Appendix 1 of this report.

The data from the surveys were collated in one Excel spreadsheet. Analysis was confined to descriptive statistics and was carried out using Excel to sum and average responses as appropriate.

A free-text box was included in each section of the survey to allow the producers to make additional comments about their sector. For each sector, the additional comments collected in this way were reviewed and key themes were identified. The number of comments pertaining to each theme were counted to evaluate which themes were arising most often for each sector. The comments which best related to these themes were then selected and are the comments which are quoted in this report.

The survey questionnaire included questions about livestock numbers and cropping areas and these were used to estimate farm type along with a question to the producer as to the main agricultural enterprise on his farm. These were used to monitor the distribution within the sample of various farm types.

The sample surveyed cannot be regarded as representative of the entire population of English organic producers. Farms to be interviewed were selected at random from contact lists provided by two (the OF&G and Soil Association) of the four organic certification bodies that are active in England. Selected farms were not stratified by region, or LFA status. While an attempt was made to monitor the proportion of farm types within the survey sample this also cannot guarantee that these proportions exactly match the proportions within the overall population of English organic farms. That said, a sample of 223 out of 2724 covers 8.2% of the overall population and so the survey can be considered as providing a good snapshot of the current situation for a number of English organic producers, although the data may not be statistically representative.

Figure 5 and Figure 31 below show the geographical distribution of the population of farms from which the sample was taken (the OF&G and Soil Association contact lists – just over 2,000 farms) and the mail-out sample (1,000 farms). It can be seen from these that the mail-out sample had a very similar geographical distribution to the overall population. Figure 4 shows the geographical distribution of the responses to the survey showing that there is a reduced representation of farms from the East of the country.

As mentioned in the overview section of this report the proportions of farm types covered show a reduced number of cereal farms and increased number of beef and sheep farms compared with the total population of organic farms in England. Extrapolating the crop areas and livestock numbers up for comparison with the Defra data suggests that grassland, arable and total organic areas are over-estimated while in-conversion area is underestimated and beef and sheep numbers are over-estimated while pig and poultry numbers are under-estimated.

APPENDIX 2: SURVEY QUESTIONS

Front

Name of Business
Contact name
Farm name
Village
Town
County
Postcode
Business phone number
Mobile phone number
Email address
Organic/in-conversion/reverted to conventional
Certified organic with?
Organic certification licence number
What is your main farming enterprise
What is your LFA (less favoured area status)

Agricultural Information

- Please indicate your organic farming intentions in the next 12 months (Tick one box only)
- At present how long are you intending to farm organically? (Tick one box only)
- If you are intending to cease organic farming in the next 2 years please list the main reasons
- Total area farmed in 2012/13 (organic, in-conversion, conventional)

Grassland (inc. rough grazing)
Fodder crops (legumes, roots etc)
Arable forage
Arable crops (combined)
Potatoes
Hort (exc. Pots, inc. Orchards)
Woodland (non-food production)
Other

ALL livestock on farm at 31st October 2013 (including contract rearing and grass keep)

Breeding beef cows
Beef heifers
Growing beef (exc. heifers above)
Breeding ewes
Replacement ewe lambs
Growing lambs (exc. Ewe lambs)
Dairy cows
Dairy heifer replacements
Sows

Other pigs
Laying hens
Other poultry
Other

Beef

- Have you produced any beef animals in the period 1 November 2012- 31 October 2013 ?
- Number of cattle sold in the period 1 November 2012- 31 October 2013 (split by stores and finished)
 - Total cattle sold
 - Total number sold as organic
 - Total number sold as conventional
 - Reason(s) for sale as conventional
- Is current finished cattle price high enough to continue organic production?
- Is current store cattle price high enough to continue organic production?
- Please indicate the % of finished and store cattle sold via various marketing routes
 - Finished cattle: direct to abattoir, producer group, livestock market, direct sales to public
 - Store cattle: producer group, livestock market, direct to a producer
- To what extent do you expect your number of finished/store organic beef cattle to change over the next two years?
- Any additional comments concerning organic cattle production?

Sheep

- Have you produced any lamb in the period 1 November 2012- 31 October 2013?
- Number of lambs sold in the period 1 November 2012- 31 October 2013 (split by stores and finished)
 - Total lambs sold
 - Total number sold as organic
 - Total number sold as conventional
 - Reason(s) for sale as conventional
- Is current finished lamb price high enough to continue organic production?
- Is current store lamb price high enough to continue organic production?
- Please indicate the % of finished and store lambs sold via various marketing routes
 - Finished lambs: direct to abattoir, producer group, livestock market, direct sales to public
 - Store lambs: producer group, livestock market, direct to a producer
- To what extent do you expect your number of finished/store organic lambs to change over the next two years?
- Any additional comments concerning organic lamb production?

Pigs

- Have you produced any pigs in the period 1 November 2012- 31 October 2013?
- Number of pigs sold in the period 1 November 2012- 31 October 2013 (split by stores and finished)
 - Total pigs sold
 - Total number sold as organic
 - Total number sold as conventional
 - Reason(s) for sale as conventional
- Is current finished pig price high enough to continue organic production?
- Is current store pig price high enough to continue organic production?
- To what extent do you expect your number of organic pigs to change over the next two years?



- Any additional comments concerning organic pig production?

Broilers

- Have you produced any broilers in the period 1 November 2012- 31 October 2013?
- Number of broilers sold in the period 1 November 2012- 31 October 2013
 - Total broilers sold
 - Total number sold as organic
 - Total number sold as conventional
 - Reason(s) for sale as conventional
- Is the current broiler price high enough to continue organic production?
- To what extent do you expect your number of organic broilers to change over the next two years?
- Any additional comments concerning organic broiler production?

Milk

- Have you produced any milk in the the period 1 November 2012- 31October 2013?
- Milk production in the period 1 November 2012- 31 October 2013 (total milk sold, sold with organic premium, sold without organic premium)
 - Volume of milk (litres)
 - Average price (ppl, e.g. 28 not 0.28)
 - Reason(s) for sale as conventional
- How many litres of ORGANIC milk are used to feed calves?
- Is the current milk price high enough to continue organic production?
- To what extent do you expect your amount of milk produced to change over the next two years?
- Any additional comments concerning organic milk production?

Eggs

- Have you produced any eggs/pullets in the period 1 November 2012- 31 October 2013?
- Egg production in the period 1 November 2012- 31 October 2013 (total eggs sold, sold with organic premium, sold without organic premium)
 - Number of eggs (dozens)
 - Average price (£/dozen, e.g. 1.50)
 - Reason(s) for sale as conventional
- Is the current egg price high enough to continue organic production?
- To what extent do you expect your organic egg production to change over the next two years?
- Any additional comments concerning organic egg production?

Arable

Have you produced any arable combined grain and pulse crops in the period from 1 November 2012 - 31 October 2013? (Excluding crimped and wholecrop)

Crop Sold	Production				proportion used on farm	proportion sold off-farm	Sales					
	Area		Average yield	Production	proportion as a %	proportion as a %	Volume sold	Average Price	Notes on price	Sales route (% of value)		
	Ha	Acres	Tonnes per hectare	Tonnes			Tonnes	£/t	any explanation/notes with regards to price	Direct to another farmer	Direct to a processor	Bulk buyer
Wheat (feed)												
Wheat (milling)												
Barley (feed)												
Barley (milling)												
Barley (malting)												
Oats (feed)												
Oats (milling)												
Oats (malting)												
Triticale												
Peas												
Beans												
Oilseeds												
Cereal/legume mix (grain)												
Other crops												

- Is current price of organic grains & pulses high enough to continue organic production?
- To what extent do you expect your organic arable production to change over the next two years?
- Any additional comments concerning organic arable production?

Fruit and vegetables

Have you produced any fruit and vegetables in the period 1 November 2012- 31 October 2013?

Crop Sold	Production		Sales		
	Area (ha or acres)		Sales route (%) of value		
	Ha	Acres	Direct to public %	Wholesaler / retailer %	Packer / processor %
			Packaged	Packaged	Bulk
Mixed market garden					
Potatoes (seed)					
Potatoes (ware)					
Field vegetables					
Salad & protected cropping					
Top Fruit					
Soft fruit					
Other crops					
Other crops					

- Is current price of organic fruit & vegetables high enough to continue organic production?
- To what extent do you expect your organic fruit and veg production to change over the next two years?
- Any additional comments concerning organic fruit and vegetable production?

Other

- Have you produced any other organic primary food product not included in this survey (please specify)
- Production/sales in the period 1 November 2012- 31 October 2013 (give units)
 - o Total amount produced/sold
 - o Total amount produced/sold as organic
 - o Total amount sold as conventional
 - o Reason(s) for sale as conventional
- Is the current organic price of this product high enough to continue organic production?
- Any additional comments concerning organic production?

Direct sales

- Have you sold any produce directly to consumers in the period 1 November 2012- 31 October 2013?
- Please indicate the main content of your direct sales
- Approximate percentage of direct sales of total sales (by volume)?
- Approximate percentage of direct sales of total sales (by value)?
- How have sales changed during the last year?

- Is the current price paid for direct organic sales high enough to continue selling them organically?
- Please indicate what proportion of direct sales (by value) are made through the following outlets (farmers’ markets, farm shop, box sales/on-line/mail-order, other)
- What do you think is the main constraint to your direct organic sales?
 - Specify exact issue:
- Any additional comments concerning direct sales?

Export outwith EU

- Have you exported any organic produce outside of the EU in the period 1 November 2012-31 October 2013
- What produce and to what countries?

beef	Oats (feed)
sheep	Oats (milling)
pigs	Beans
broilers	Cereal/legume mix (grain)
milk	Potatoes (seed)
eggs	Potatoes (ware)
Wheat (feed)	Field vegetables
Wheat (milling)	Salad and protected cropping
Wheat (malting)	Top Fruit
Barley (feed)	Soft fruit
Barley (milling)	Other crops
Barley (malting)	Other product

- Do you plan to export to markets outside of the EU over the next 12 months?
- Please give details of the produce you plan to export
- and please give details of the countries to which you plan to export
- Do you plan to export to markets outside of the EU further into the future?
- Please give details of the produce you plan to export
- and please give details of the countries to which you plan to export
- Do any barriers exist which prevent you from exporting to overseas markets?
- If there are barriers, what are they?

