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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](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

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

- **Dairy**: 30%
- **Fruit, vegetables and salad**: 24%
- **Baby food**: 10%
- **Meat, fish, poultry**: 11%
- **Bakery, cakes**: 2%
- **Beer, wine, spirits**: 2%
- **Other**: 21%

Source: Soil Association 2011 Market Report
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)

2012 2013

Catering
Farm shops & farmers markets
Box schemes/mail order
Other independent
Multiples

Strongest growth in independent sectors expected

Source: Soil Association Market Reports
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