Sales of organic products in the UK grew by 2.8% in 2013, a decisive return to growth after four years of contraction. The rate of growth was above the annual inflation rate of 2%, despite the continuing squeeze on family finances in a year in which wages rose by only 0.8%.

Independent retailers lead the way

Independent retailers are leading the way as shoppers look to local, specialist and online outlets for the quality and variety of organic products that are not available in many supermarkets. Sales through the independents increased by 6.9% to nearly £10 million a week, reaching their highest level since the record-breaking year of 2008. Sales through box schemes, independent online shops and other home-delivery outlets increased by 11%.

Sales through the supermarkets rose too, by 1.2% – the first increase since 2009. The strongest overall growth among the major retailers was achieved by online grocer Ocado (up 10.4%) and Waitrose (up 6.5%). Sainsbury’s is the UK’s biggest organic retailer, with sales of its own-label organic range up 7%.

Dairy, vegetable and catering sales growing

Growth has been particularly strong in the dairy sector, where overall sales increased by 4.4%. Organic milk sales grew by 5% and yoghurt sales by 7%. Sales of organic vegetables increased by 3.4%, while the market for meat, fish and poultry grew by 2.2%.

Catering and restaurant sales rose by 10%, buoyed by the success of the Soil Association’s Food for Life Catering Mark and by demand from high-street chains such as McDonald’s and Pret A Manger for organic milk, tea and coffee. Sales of organic health and beauty products and organic textiles rose by 17% and 10% respectively.

Spreading the word

The message to retailers and organic businesses is clear – if you make organic products available and promote them well, consumers are ready to respond. Independent retailers reporting growth in 2013 put their success down to two factors above all others – increased marketing and innovation through the introduction of new products.

The horsemeat controversy played a part too, by reminding the public of the quality, integrity and traceability of organic products. But the green shoots of revival appeared before ‘Horsigate’, and consumer demand for organic food continues to accelerate one year on.

A cloud on the horizon?

A cloud may be forming on this bright horizon. Questions are being asked by some farmers about continuing with organic production in the face of high feed costs, a lack of longer-term commitment from some retailers and uncertain support from policy makers.

There is a risk that supply of some key commodities may dip just as demand is picking up, putting imported organic products on the shelves where UK products could be. If this supply challenge can be addressed, however, previous farming experience suggests that the future looks positive.

Financial comparisons published by the Soil Association show that organic farm businesses were more stable and slightly more profitable than their comparable non-organic counterparts between 2006 and 2012.  

Building on market growth

Every link in the supply chain has a part to play in further building the organic market:

- Policy makers can provide the active and stable support that has been sorely lacking. The UK is at the bottom of the EU league in terms of financial support for organic farming and our farmers deserve the levels of support enjoyed by those elsewhere in Europe.
- Retailers can raise their game by following the lead of those who are making sure a full range of organic products is available in store and online. They can also do more to promote their organic offering, introduce new products and strengthen supply chains for the long term, boosting farmer confidence.
- Organic farmers, growers and food companies can follow the lead of those who are already planning ahead together to ensure that future supply meets growing consumer demand.
- Consumers can shop online and in local independent shops to find a wider range of organic products, and support their local communities by buying directly from local farmers and farm shops.

Rob Sexton  
Chief Executive  
Soil Association Certification

Executive summary
Overview

UK Organic Market 2013

UK sales +2.8%

Growth in UK, Europe and worldwide

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

Why buy organic?

- 37% Fewer pesticides/chemicals
- 34% Natural/unprocessed
- 33% No GM ingredients
- 29% Healthier for me and my family
- 24% Better for nature/the environment
- 21% Better animal welfare
- 21% Tastier
- 19% More ethical

Predicting growth

- €45.8 billion Global sales
- €21.5 billion European sales
- £1.8 billion UK sales

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UK at a glance

- Sales £1.79 billion + 2.8%
- Land 605,629 ha - 7.3%

UK Organic Market 2013

- 1.2% Multiple retailers
- 6.9% Independent retail
- 11% Box schemes and home delivery
- 10% Catering and restaurant sales
- 17% Health and beauty
- 10% Textiles
- 4.4% Dairy
- 3.4% Vegetables
- 2.2% Meat, fish and poultry
The UK organic market

Sales of organic products in the UK increased by 2.8% in 2013 – a decisive return to growth after four years of market contraction.

The revival was spearheaded by independent retailers – including online shopping, home-delivery box schemes, farm shops and specialist stores. Some shoppers continue to look to local, specialist and online outlets for the variety of organic products or the kind of shopping experience that is not available in some of the major supermarkets, with supporting local farmers also a factor. Sales through independent retailers increased by 6.9%.

Growth was particularly strong in the dairy sector, which accounts for 30.2% of organic sales through the multiple retailers. Organic dairy sales increased by 4.4% overall, with milk sales up 5% and yoghurt sales up 7%. Sales of organic vegetables increased by 3.4%, while the market for meat, fish and poultry grew by 2.3%.

The return to growth was given a helping hand by the horsemeat controversy. This led to a spring surge in organic beef sales and prompted renewed interest in a product that is not available in some of the major supermarkets. Sales through independent retailers increased by 10% as a result of growing demand for meat, fish and poultry.

Another success story is the organic food-service sector, which increased its sales by 11% as a result of growing demand from the public sector (especially schools and hospitals), which grew by 10% as a result of growing demand for meat, fish and poultry.

Sales of non-organic baby food, where organic sales now account for 54.8% of all sales through the supermarkets. Sales remained constant in 2013, despite sales of non-organic baby food falling by 7.9%.

The sector where organic products are most dominant is meat, fish and poultry, with sales of organic beef and poultry both up 2.2%.

The strongest growth was achieved by the online grocer Ocado, the country’s fourth-largest organic retailer, which increased its organic sales by 10.4%. It expanded its range of organic lines by a striking 79% to over 2,500, 55% of which are under its own-label brand. Its most popular organic purchases are bananas, blueberries, apples, carrots, large fruit-and-vegetable boxes, semi-skimmed milk and chicken.

Waitrose increased its organic sales by 6.5%, and predicts a further increase in sales of around 7% in 2014. For the 21st birthday of the brand, Waitrose introduced new fresh bread and potato lines under the Duchy Originals organic food and drink label. It gained customers from Sainsbury’s and Tesco during the horsemeat controversy, which led to a sustained uplift in its organic sales. Own-label products now account for 61% of its organic turnover, with 10% of all its organic sales online. Eight of its 10 best-selling organic lines are part of the Duchy Originals from Waitrose and Waitrose Organic ranges.

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Another success story is the organic food-service sector, which grew by 10% as a result of growing demand from the public sector (especially schools and hospitals), restaurants, coffee shops and delicatessens. Over 160 million meals accredited under the Soil Association’s Food for Life Catering Mark were served in 2013 – an increase of 14.3%.
The UK organic market

Morrisons redesigned and relaunched the packaging for its own-label M organic range in 2013, while Tesco started stocking organic Fairtrade bananas for the first time. Tesco reports that demand for organic fruit and vegetables has increased significantly, but meat sales are static. Both these retailers and Marks and Spencer anticipate little change in organic sales in 2014 but Sainsbury’s, Waitrose and Ocado all predict further growth.

Common factors in the success of Sainsbury’s, Waitrose and Ocado include a strong online presence, extensive organic ranges and a strong commitment to new product development and marketing. Their rivals risk losing further market share if they do not respond and losing organic shoppers, who tend to spend more on premium products than the average consumer and more on their shopping as a whole.

Independent retailers

There was a 6.9% increase in sales through independent outlets in 2013. This encompasses box schemes; online purchases; farm, health and wholefood shops; and farmers’ markets. The independent sector is now valued at £513 million – close to £10 million worth of sales each week and the highest figure since the record year of 2008.

Of the independent retailers responding to a recent Soil Association survey, 75% reported sales growth in 2013. Three-quarters of these had seen their sales increase by more than 10%. Only 19% reported no change, and just 6% reported a decline in sales. The outlets doing best are home-delivery specialists and large retailers in urban areas, both of which offer the extensive organic ranges and convenience that committed consumers demand.

Planet Organic increased organic sales through its six London stores by 14%, close to £10 million more than in 2012. Sales of specific lines such as premium home-made bread and muesli bars were up, while sales of organic coffee showed an increase of more than 14% on the previous year. Nearly a third of meals served are now at the Silver and Gold levels of accreditation in which organic sourcing plays a part – an increase of more than 60%.

In England the scheme has for the first time seen government citing the Catering Mark as an effective way to raise food standards. The Department for Education’s new School Food Plan highlights the Catering Mark as a procurement standard for which caterers should be aiming, while NHS England has cited the Catering Mark as a way for commissioners and hospitals to demonstrate progress in raising hospital food standards.

Brighton-based Infinity Foods achieved 18% growth, with an expansion of its customer base as the main driver. More than half of its organic turnover comes from supplying independent retailers, and it predicts further growth of 10% in 2014. Community Foods, whose wholesale division accounts for 22% of its business, grew by 4% overall and reports a positive outlook in wholesale networks, with renewed demand from wholefood retailers and foodservice organisations.

Restaurants and catering

Sales of organic food and drink through the foodservice sector increased by 10% in 2013, to £17.5 million. Organic businesses experienced growing demand from public sector catering and through high street restaurants, cafés and ‘food to go’ outlets.

The Soil Association’s Food for Life Catering Mark the UK’s fastest growing foodservice best practice scheme, accredited over 160 million meals served in 2013 – an increase of more than 14% on the previous year. Nearly a third of meals served are now at the Silver and Gold levels of accreditation in which organic sourcing plays a part – an increase of more than 60%.

Soil Association Organic Market Report 2014
The UK organic market

A new Catering Mark supplier membership was created in 2013 to provide a link between caterers who want to source ingredients that meet the standards and the producers, manufacturers and wholesalers that can help. This network already has over 100 members, including large wholesalers and distributors such as 3663, Brakes, E-foods and NCB. A number have listed new organic lines to support their customers’ needs.

Workplaces represent a significant proportion of the foodservice market, and this year staff at the Scottish Government, PepsiCo Walkers, The Greater London Authority’s City Hall, Jaguar Land Rover and the London Fire Brigade have been among those gaining access to fresh, healthy, sustainable food through the Catering Mark.

The Soil Association launched its Out to Lunch campaign in July, challenging high street restauranteurs to raise the standard of food and service offered to children when they eat out. The campaign urges restaurants to improve their kids’ menus, introducing organic options and starting with baby food and milk. Jamie’s Italian, which topped the first Out to Lunch league table of 21 chains, switched to using organic pork, chicken and salmon in its kids’ meals in 2013, and other companies are also increasingly getting involved.

Among the biggest names on the high street already switched to using organic pork, chicken and salmon in their meals are McDonald’s, which uses in its kids’ meals in 2013, and other companies are also increasingly getting involved.

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Non-food products

Health and beauty

The Soil Association calculates that UK sales of certified organic health and beauty products increased by 17% in 2013, to £37.2 million. The number of Soil Association symbol holders increased by 12.5% to 135.

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<th>£50m</th>
<th>£40m</th>
<th>£30m</th>
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<td>2008</td>
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<td>£13.2m (+36%)</td>
<td>£8.83m (+32%)</td>
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The first revision of the international organic and natural COSMOS standard was published in October, streamlining the certification process while ensuring that standards remain high.

Neal’s Yard Remedies is the market leader in organic health and beauty in the UK and internationally, and is the largest Soil Association-certified business in the sector. It has more than 40 stores and 450 outlets across the UK, with over 80 stores globally in more than 20 countries across five continents. In the past year the company has reported a double-digit percentage growth in organic sales, opened new stores in Windsor and Bury St Edmunds, and introduced 48 new organic lines to its extensive range.

The second-largest consumer brand certified by the Soil Association is the Yes Yes Company, which produces a range of water-based and oil-based intimate lubricants. Its organic turnover increased by 23% in 2013. Trade sales and exports, which reached 72 countries, were particularly buoyant. The company has just secured NHS approval for two of its products to be available on prescription from spring 2014.

The fastest growing companies among larger UK organic businesses were Naissance Trading (primarily a wholesaler of essential and vegetable oils) and Bamford, which runs a luxury spa in Gloucestershire and supplies bath and body care products to leading UK retailers and to five-star hotels in eight countries. Bamford more than trebled its organic turnover in 2013, securing listings with Fortnum & Mason and new amenities contracts with ski hotels in France and Switzerland. The company repackaged its entire range in July and launched a new facial oil in September.

As part of Organic September the Soil Association organised the UK’s first Organic Beauty Weekend to showcase what symbol holders have to offer and campaign for better labelling of organic beauty products. Further promotion of organic health and beauty products is planned for Organic September 2014.

Among the leading companies supporting Organic Beauty Weekend in 2013 was Pai Skincare, which specialises in facial and bodycare products for sensitive skin. Pai launched its ‘Know the difference, feel the difference’ campaign during Organic September, to help the public distinguish between truly organic and non-organic products. The company’s organic sales increased by 38% in 2013 and exports are booming, accounting for 50% of organic sales compared with 30% a year ago.

Textiles

Soil Association Certification, the UK’s leading certifier of organic products to Global Organic Textiles Standards (GOTS), saw the turnover of its 73 textile symbol holders increase by 36% in 2013. Much of this growth was export-led, but the UK market for organic cotton is estimated to have grown by around 10%.

The market consists of both 100% organic products and others containing a mix of organic and non-organic cotton. This is because some major retailers and brands are incorporating organic cotton into their manufacturing mix.

Textile Exchange said in its 2013 Organic Cotton Market Report that the top five buyers of organic cotton in 2012 were C&A, H&M, Nike, Puma and Coop Swiss. Market leader C&A produced 80 million organic clothing items in 2012, while 7.8% of all the cotton used by H&M was certified organic.

Among the highest profile newcomers to organic certification in the UK in 2013 was the fast-growing Gro, which produces an award-winning range of infant and children’s sleeping bags and swaddle clothes.

The GOTS standards were reviewed in 2013, and new standards for personal care products such as cotton wool, tampons and cotton buds will be launched in spring 2014. The number of GOTS-certified textile facilities globally has reached 3,016, an 11% increase on the previous year.

It is only in the small organic wool sector that textile sales have dropped. Production decreased in volume terms by a third to 142,473kg, and in value terms by 52% as a result of a 28% fall in wool prices across the board.

October saw the anniversary of the launch of the Soil Association’s Cottoned On campaign (www.cottonedon.org), which challenges major players in the international textiles industry to sign up to organic as the most reliable and trustworthy standard for sustainable textiles production.

Organic pioneer People Tree is among the companies that have been closely involved in the Cottoned On campaign, and reports a significant increase in its certified organic sales. The company’s European sales topped £2 million in 2012 (up 16%), and it expects to be able to report another £2 million of sales in Japan alone in 2013.

Soil Association Certification’s leading organic textile symbol holder in terms of turnover is Continental Clothing. Its organic sales grew by 19% last year and it anticipates further growth of around 10% in 2014. In 2013 it launched a new range of T-shirts made from 60% recycled organic cotton and 40% recycled polyester. In common with most non-food organic businesses, exports increased as a proportion of turnover from 20% a year ago to 25% at the end of 2013.
The organic consumer

Data based on barcode scanning of people’s purchases consistently show that around four out of five households buy organic products.

Healthy, green and tasty
A third of organic consumers purchase organic produce for health reasons. According to a YouGov poll conducted for the Soil Association in February 2014, the presence of fewer chemicals in organic produce is the most significant motivating factor, cited by 37% of those who have bought organic produce in the last year. This is followed closely by the view that organic products are more natural and unprocessed (34%) and/or healthier for them and their family (33%). These findings are consistent with previous polls that have shown health as the most important issue driving organic purchases.

The environment, taste, animal welfare and avoiding GM foods are also significant motivations. Nearly three out of ten organic shoppers (29%) are motivated by caring for nature and the environment, while 24% say it is because organic food tastes better. More than one in five refer to organic farming’s high animal welfare standards (21%) and exclusion of GM ingredients (also 21%).

Supporting local farmers
When asked to identify the three places where they most often bought organic produce, shoppers named supermarkets (81%), farm shops (25%) and farmers’ markets (19%) above all others. This shows how strongly organic consumers are motivated to support their local farms and farmers, alongside more frequent shopping in supermarkets.

Londoners were much less likely to buy from farm shops than the average British shopper – reflecting the relative scarcity of farm shops in Greater London – but twice as likely to buy organic products online when compared to the national average (12% v 6%). Less than one in five (21%) respondents in London picked out farm shops as one of the three main places they shopped for organic produce, whereas more than one in three people (35%) frequented farm shops in the south west. Shoppers aged 18–24 were twice as likely as the average organic shopper to favour buying from a home-delivery box scheme (12% v 6%), and significantly more likely to buy organic products online (10% v 6%).

Younger shoppers are key to growth
Kantar Worldpanel research tells us that people under 34 are much more likely to be prepared to pay more for organic products. This suggests that young shoppers may hold the key to accelerating future growth. Levels of disposable income are also likely to be an important factor, as families with no children spend more per capita than large families. More than half of all spending on baby food goes on organic products, reflecting the apparent change in food priorities when feeding a young family.

Popular organic brands
Outside of multiple retailers’ own-label ranges, sales of organic products are dominated by a number of trusted, well established brands. The most popular of these in the supermarkets is Yeo Valley Organic, followed by Green & Black’s and Rachel’s Organic. In a survey conducted by Natural and Organic Products, independent retailers identified Biona as the most popular organic brand with their customers, followed by Infinity, Doves Farm, Meridian and Clipper.

The most popular organic brands...

...in supermarkets*
1. Yeo Valley Organic
2. Green & Black’s
3. Rachel’s Organic
4. Kallo
5. Whole Earth

...in independent retailers**
1. Biona
2. Infinity
3. Doves Farm
4. Meridian
5. Clipper

Top reasons for buying organic

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<tr>
<td>More ethical</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
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</tr>
</tbody>
</table>

*Source: YouGov/Soil Association, February 2014

Importance of choosing organic products when shopping for food (London shoppers)

- Extremely important: 16
- Very important: 26
- Fairly important: 35
- Not very important: 20
- Not at all important: 4

Leaping Research/Organic Naturally Different Campaign

Propensity of different age groups to spend more on organic food

Source: Kantar Worldpanel

1. Age under 28
2. Age 28-34
3. Age 35-44
4. Age 45-54
5. Age 55-64
6. Age 65+

I am prepared to pay more for organic food

Source: Kantar Worldpanel

*Kantar Worldpanel sales data

**National and Organic Products survey
The feel-good factor associated with the organic market’s return to growth has been slow to transfer to some organic farmers, and 2013 was a challenging year for many.

The long-term prospects for organic farmers are good, however. Not only are consumer confidence and consumer demand growing, but new research has highlighted the higher long-term profitability of organic production.\(^4\)

Defra reports that producer and livestock numbers and the UK’s organic area decreased in the year to December 2012 – the most recent period for which UK-wide data are available. The organic market has returned to growth since then but confidence remains fragile in some sectors and some parts of the UK because of a combination of continuing high feed prices, extreme weather, tight organic premiums and mixed signals from retailers and policy makers.

The year began with a cold March and April that held back spring and delayed the start of the fresh produce season. Despite this many growers reported bumper crops when summer finally put in an appearance.

Many organic farmers reported shortages of forage, reflecting the damage to grassland caused by severe wet weather in 2012. Liver fluke continues to afflict organic management is greater than the combined areas of Oxfordshire, Buckinghamshire and Berkshire, and constitutes 3.5% of the agricultural land area.

Numbers of organic producers and processors fell by 6.3% to 6,487. The biggest reductions were seen in Scotland, Northern Ireland and north-eastern England, where there was a decline of 10-13%.

The abattoir sector has been under pressure for some time from the high price of livestock and an inability to pass price rises on to customers. One key casualty of this in 2013 was Ensor’s Abattoir in Gloucestershire, which changed ownership and moved out of organic processing towards the end of the year.

**National trends**

**England**

The land area registered as organic decreased by 7.7% in 2012 to 324,000 ha – 3.6% of England’s agricultural land. On a more positive note there were 19,000 ha of land in conversion to organic production in England at the end of 2012 – 59% of the UK total.

There is wide regional variation, with organic land peaking at 8.3% in the south west and at its lowest in the east of England, the East Midlands and Yorkshire and Humber (1-1.2%). New land entering conversion dropped by 24%, reflecting fragile producer confidence about farmgate and feed prices and an uncertain policy and retail environment.

In the autumn of 2013 the Organic Research Centre conducted a survey of English organic producers that is organic 2013

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*(See Looking forward section for more information.)*

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\(^4\) See Looking forward section for more information.
Organic farming in the UK

22% of organic producers host educational activities and a significant number do on-farm retailing (15%) and/or processing (11%).

The area of farmland managed organically fell by nearly 17% in 2012, and the amount of new land in conversion remains small, with producers waiting for clear signals from policy makers and the consumer.

Northern Ireland

Vegetable box schemes reported strong demand in 2013, suggesting the beginnings of a revival in the organic market in Northern Ireland after organic production fell sharply in 2012. The main organic poultry processor was selling 45,000 birds or bird equivalents per week at the end of 2013 – a 7% increase on 2012.

Numbers of beef and sheep producers have been fairly constant in the past 12 months, despite the absence of a premium for organic lamb. Premiums for organic beef remained steady through much of the year, and wholesale organic produce sales have also been constant.

Organic Centre Wales reports, however, that there has been a reduction of around 2% in the number of organic milk producers in Wales. Payment rates have not yet been fixed but it is hoped that the new scheme will provide reassurance of certainty for future support in the face of the delayed implementation of the Welsh Government’s new Rural Development Plan.

Wales

Wales has seen a significant number of farmers withdraw from certification and the Organic Farming Scheme (OFS) in 2013, accelerating a downward trend that began with a 2.4% reduction in the organic land area in 2012. There is likely to be further contraction for at least the next year. Despite this, many organic businesses are experiencing stable or increasing sales, a reflection of strengthening consumer demand in the UK at large.

Uncertainty in the Welsh organic sector stems from concerns about small premiums and large feed bills, and doubts over future support in the face of the delayed implementation of the Welsh Government’s new Rural Development Plan.

The annual Organic Centre Wales producer survey conducted in November, found that about 150 of the 707 farmers contacted (21%) had de-certified during 2013. This points to a reversion of around 27,000 ha of organic land, potentially reducing the organic area in Wales by over 20%. Of the remaining organic land, only around 2% is in conversion and this is mostly attributable to certified farms bringing additional land into their systems rather than new entrants.

The withdrawals have impacted on livestock production: numbers of beef cattle are down 30%, sheep have been reduced by 25% and dairy cows are down 18%. Organic Centre Wales reports, however, that there has been an increase in the proportion of organic animals going to the organic market as opposed to being sold as non-organic. Despite the significant reduction in cattle numbers, organic sales of finished and store cattle were higher in 2013 than in 2012. Although total lamb sales were down, the proportion sold as organic increased, partly due to many flocks completing conversion in 2013.

As part of CAP reform, farmers can join the stand-alone Glastir Organic Scheme and remain eligible for other parts of Glastir, the new agri-environment scheme in Wales. Payment rates have not yet been fixed but it is hoped that the new scheme will provide reassurance.
that the Welsh Government remains committed to the principles of organic farming as an important part of its wider strategy for agriculture.

**Sector by sector**

**Milk**

Dairy producers have been in the forefront of the organic sector’s return to growth, with sales of organic dairy products through the supermarkets up 4.4% and milk sales up 5%. A key factor in this success has been the wide availability of organic milk as demand has picked up – assisted by incremental increases in distribution by the retailers. Twenty-two pence in every £1 spent in supermarkets on organic products in 2013 went on organic milk or yoghurt. Output fell by 8% but the number of organic dairy producers has now stabilised, with reversions to non-organic production largely a thing of the past.

**Horticulture**

Demand picked up in 2013, with supermarket sales increasing by 2.2% and the biggest box schemes reporting double-digit growth. Leading supermarkets are responding to this upturn by looking to secure more organic land and supplies. Most crops performed well in 2013 after slow initial growth in the cold spring. Cabbage white butterflies caused significant problems, but other pests such as leek moth were less in evidence after the wet conditions of 2012. The dry summer meant low disease levels, ensuring high yields for potatoes and other disease-prone crops.

**Sales**

- Lamb -6%
- Pork -13.3%
- Poultry +12.3%
- Eggs -6.2%
- Dairies +4.4%
- Milk +5%
- Fresh fish -6.6%

**Output**

- Sheep -9.2%
- Pork -1.2%
- Vegetables +3.4%
- Salad -4.7%
- Beef +1% -13.3%

**Organic eggs**

Organic eggs accounted for 5.3% of all supermarket egg sales in 2013 – second only to yoghurt in terms of market penetration among fresh food categories. Despite this solid base of consumer support, organic egg production fell by 8.2% in the first three quarters of 2013 compared to the same period in 2012. More producers left organic production, sceptical about future prospects in the face of rising costs and tightening standards, and this raises the prospect of supply shortages in the future. A significant factor in the recent drop in production has been the tightening of EU organic standards over time, with some producers choosing to drop out of organic production rather than incur higher costs. On the high street Waitrose is the only major retailer whose eggs are produced to the highest Soil Association welfare standards. Supply shortages were evident on shelf in both Sainsbury’s and Waitrose over the second half of 2013, early signs that demand is outpacing supply in this sector.

**Salmon**

A combination of stronger sales through the independent sector and a buoyant export market ensured that UK production of organic salmon remained stable in volume terms, despite a 6.6% drop in supermarket sales. Some UK producers had to sell a percentage of their organic stock as non-organic as a result of price pressure from Irish and Norwegian imports, but the prices secured by UK producers increased by 9% over the year. This was due largely to demand for non-organic salmon outstripping supply and pushing up salmon prices across the board. Lower average seawater temperatures in 2013 hampered fish growth in some locations but also helped restrict persistent pest and disease challenges.

**Organic dairy products**

Organic dairy products through the supermarkets up 4.4% and milk sales up 5%
Organic farming is practised in 164 countries, according to the latest data collected by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM). In 2012 37.5 million ha of farmland were managed organically, and organic farming had a 0.9% share of global agricultural land.

The global area of organic farmland increased by almost 0.2 million ha in 2012 – equivalent to around a third of the organic area in the UK, Australia, Argentina and the United States are the countries with the most organic land. The Falkland Islands (36.3%), Liechtenstein (29.6%) and Austria (19.7%) lead the way in terms of the proportion of land under organic management. Almost a third of organic farmland is in Oceania, much of it extensive pasture land, and another third is in Europe. Latin America accounts for around 20% and Asia 10%.

Global sales continue to rise. Organic Monitor estimates that organic food and drink sales worldwide reached almost $64 billion (over £43 billion) in 2012. Demand for organic products is concentrated in North America, with the United States ($19.5 billion), Germany ($6 billion) and France ($3.4 billion). The highest average consumption per person was in Switzerland ($163), Denmark ($137) and Luxembourg ($123). The highest market shares of the food and drink market for organic products were in Denmark, Switzerland and Austria.

**The Americas**

The North American organic market is the world’s largest, worth $21.3 billion. Sales of organic products in the United States grew by 10.2% in 2012, to $19.5 billion, and now account for 4.3% of the country’s food and drink sales. The area of US farmland under organic management is over 3 million ha.

Latin America, with 6.8 million ha of organic farmland, is an important producer and exporter of organic products. Production is dominated by three countries that together account for over three-quarters of the organic land area: Argentina (53%), Uruguay (14%) and Brazil (10%). Coffee, cocoa and fruit are the most extensively cultivated organic crops. Latin American consumer markets are developing too. Brazil has the largest market in the region, with growing consumer awareness fuelling growth.

**Europe**

Europe is both a significant consumer and a large-scale producer of organic foods. Organic production accounts for 2.3% of European farmland, and 5.6% of farmland within the EU. In 2012 the area of organic farmland and sales of organic products both increased by 6%, to 11.2 million ha and $19.7 billion respectively.

Germany (31%) and France (18%) account for nearly half of all sales, followed by the UK (8%), Italy (8%) and Switzerland (7%). The three biggest European markets outside the UK all achieved healthy growth in 2012. Sales in Italy were up 11.8%, while the German and French markets grew by 6.1% and 5.3% respectively. This trend continued in 2013, with France and Germany reporting increases of 6.7% and 7.2% and early reports showing that supermarkets in Italy posted an increase of 8.8% for organic products for the first four months of the year. The highest per capita consumption is in Scandinavia and Alpine countries, with Switzerland and Denmark out in front. Denmark is also the country with the highest organic market share worldwide. Organic products comprise 7.6% of its food and drink sales.

**Asia**

In Asia 3.2 million ha of farmland is under organic management. Three-quarters of this land is in China (1.9 million ha) and India (500,000 ha). Oilseeds and cereals are the most extensively cultivated crops, followed by tea and coffee.

According to Organic Monitor, the Asian market for organic products is growing at a steady rate, as growing awareness of organic production methods increases demand. Most sales occur in the more affluent countries, such as Japan, South Korea, Taiwan, Hong Kong, Malaysia and Singapore. Japan is the largest market in Asia, followed by China and Korea.

**Oceania**

Oceania has about a third of the world’s organic land (12.2 million ha). Its share of global sales is about 2%. While sales of organic products in Australia, New Zealand and the Pacific Islands may be modest, the Australian market in particular is growing fast. Sales have quadrupled in the past decade, growing by 21% in 2012 and exceeding AU$1 billion for the first time. Australia and New Zealand are particularly important organic producers from a global perspective, exporting significant volumes of organic beef, lamb, wool, kiwi fruit, wine, apples, pears and vegetables. Asia is the major destination, followed by Europe and North America.

Africa has half a million organic producers and 1.15 million ha of organic land. The area of land under organic management grew by a remarkable 7% in 2012, and has more than tripled in the past decade. Coffee, olives and cotton are the three most extensively cultivated crops, accounting for a third of the continent’s organic land area. Almost all certified organic production goes to the export market, particularly the European Union. Internal demand is also developing, especially in Egypt and in South Africa, which has Africa’s largest organic market.

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**Notes:**

- All figures are rounded.
The revival in UK organic sales looks set to continue in 2014, with consumer demand increasing and leading retailers and organic businesses confidently predicting growth.

Predictions of growth
There is a real sense of optimism among large organic businesses. Eighty per cent of those surveyed anticipate sales growth in 2014. That figure rises to 84% among a sample of independent retailers. In a survey of five leading supermarkets plus Ocado, three predict steady sales and the others predict growth.1

This business optimism reflects growing consumer confidence about an improving economic picture. The UK economy grew by 1.9% in 2013, its strongest annual growth since 2007, and the Bank of England recently upgraded its forecast rate of growth for 2014 to 3.4%.

Nearly three-quarters (73%) of the organic shoppers among consumers surveyed in a YouGov poll for the Soil Association in February 2014 said they expected to buy more organic products this year than last, with fruit and vegetables (45% of respondents), eggs (32%) and chicken (29%) the products most likely to attract increased spending.

Matching demand and supply
A small cloud may be forming on this bright horizon. A survey conducted by the Organic Research Centre in autumn 2013 found that although there is a core of farmers who are committed to organic production for the long term in principle, and more producers than not who envisage expanding production in the next two years, many question whether farmgate prices are good enough for their businesses to remain viable.

Significant numbers of pig, poultry and egg producers have already left organic production in the past two years. A serious injection of producer confidence is now needed, in the shape of increased commitment from retailers and policy makers, if market growth with a healthy balance between supply and demand is to be achieved.

With global organic production on the increase, the threat is not that the organic shelves will be empty but that more of that shelf space will be taken up by imports if UK production falls short. Arable crops, poultry, eggs, lamb and fish are the sectors most vulnerable to this on current trends. Undersupply in these areas would represent a missed opportunity for extending organic farming in the UK as demand grows, and a lost chance to improve biodiversity and agricultural employment in our countryside.

Percentage organic shoppers that think they’ll buy more, in next year, of various organic products/produce

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit and vegetables</td>
<td>45%</td>
</tr>
<tr>
<td>Eggs</td>
<td>32%</td>
</tr>
<tr>
<td>Chicken</td>
<td>29%</td>
</tr>
<tr>
<td>Dairy</td>
<td>22%</td>
</tr>
<tr>
<td>Beef / lamb / pork</td>
<td>21%</td>
</tr>
<tr>
<td>Home cooking / baking ingred.</td>
<td>15%</td>
</tr>
<tr>
<td>Tea / coffee / soft drinks</td>
<td>11%</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>6%</td>
</tr>
<tr>
<td>Bath / shower products</td>
<td>6%</td>
</tr>
<tr>
<td>Textiles</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>27%</td>
</tr>
</tbody>
</table>

Source: YouGov/Soil Association

UK organic market predictions for 2014

<table>
<thead>
<tr>
<th>Category</th>
<th>Leading organic companies*</th>
<th>Multiple retailers**</th>
<th>Independent retailers***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>Growth 80%</td>
<td>No change 10%</td>
<td>Growth 90%</td>
</tr>
<tr>
<td>Milk</td>
<td>Growth 60%</td>
<td>No change</td>
<td>Growth 70%</td>
</tr>
<tr>
<td>Pigs</td>
<td>Growth 50%</td>
<td>No change 20%</td>
<td>Growth 50%</td>
</tr>
<tr>
<td>Broilers</td>
<td>Growth 60%</td>
<td>Decline 13%</td>
<td>Decline 8%</td>
</tr>
<tr>
<td>Eggs</td>
<td>Growth 3%</td>
<td>Decline 9%</td>
<td>Decline 4%</td>
</tr>
<tr>
<td>Arable</td>
<td>Decline 8%</td>
<td>Decline 9%</td>
<td>Decline 6%</td>
</tr>
<tr>
<td>Horticulture</td>
<td>Decline 3%</td>
<td>Decline 3%</td>
<td>Decline 3%</td>
</tr>
</tbody>
</table>

*Survey of top 100 Soil Association licensees in terms of organic turnover
**Sainsbury’s, Waitrose and Ocado anticipate growth. Tesco, Morrisons and M&S predict little change
***Survey completed by 32 Soil Association-certified retailers

*All three surveys mentioned – covering large organic businesses, independent retailers and multiples – were conducted by the Soil Association for this report.
Looking forward

The big picture is positive

This threat should not materialise, however, if the organic sector as a whole – and farmers in particular – consider the bigger picture. There are good reasons not only to stick with organic production but to be optimistic about the future market. While consumer demand and consumer confidence are both rising again, local and direct sales are beginning to thrive once more. Furthermore, the evidence of recent years reaffirms that organic production has the potential to be a profitable way forward for many farmers. Financial comparisons published by the Soil Association show that organic farm businesses were slightly more profitable and less exposed to volatility than their comparable non-organic counterparts between 2006 and 2012 - a challenging period in which four out of six years were blighted by a severe economic downturn. As input prices continue to rise for all farmers, the business advantage of lower-input organic farming is likely to strengthen further.

In the five years before the global recession, UK organic sales grew by an average of 13.3% a year. The Soil Association has calculated that if market growth accelerates steadily from 2014 onwards and returns to a 13.3% rate of growth within four years, by 2017 an extra 71.9 million litres of organic milk and an extra 57,000 tonnes of main-crop potatoes, carrots and onions will be needed to meet demand – an opportunity for organic farmers to grab with both hands.\(^7\)\(^8\)

Growing together

What is needed is for every link in the supply chain to play its part in building on the growth in the organic market:

- Policy makers can provide the active and stable support to the organic sector that has been sorely lacking, reflecting the acknowledged environmental, animal welfare and social benefits that organic farming delivers. The new Common Agricultural Policy’s Pillar 2 payments need to be used to give our organic farmers equal support to that provided elsewhere in Europe
- Retailers can raise their game by following the lead of those who are making sure a full range of organic products is available in store and online. They can also do more to promote their organic offering, introduce new products and strengthen supply chains for the long term, boosting farmer confidence
- Organic farmers, growers and food companies can follow the lead of those who are already planning ahead together to ensure that future supply meets growing consumer demand
- Consumers can shop online to find a wider range of organic products, and support their local communities by buying directly from local farmers and farm shops.

\(^7\) See www.soilassociation.org/farmeconomics

\(^8\) These calculations were made by the Soil Association rather than being based on independent economic modelling of trends, but they do serve to illustrate how demands on production could escalate in the coming years.
The Soil Association is a membership charity campaigning for fair, healthy and ecological food, farming and land use. We recognise the urgent need to achieve a dynamic balance between the needs of the public as consumers and citizens, food producers and the wider ecosystem – our soil, plants, livestock and wildlife. We work with pioneering organic and mainstream farmers to unearth the full potential of the soil, and with wide-spread consumers to feed their growing interest in the health of our food and farming systems. We hope to succeed in meeting these challenges.

In the face of climate change and global population growth, the challenges of producing more food, cutting greenhouse gas emissions and pollution, and protecting wildlife and animal welfare grow more acute by the year. We believe that only by improving the health of our food and farming systems can we hope to succeed in meeting these challenges.

The Soil Association is a membership charity campaigning for fair, healthy and ecological food, farming and land use, for the benefit of everyone. We are the UK’s largest organic certification body, responsible for certifying over 70% of all organic products sold in the country. We certify organic food and farming, organic textiles and organic health and beauty products. Working nationally and internationally our team of certification officers, technical staff, inspectors and trade managers provide unrivalled solutions and support.

Trusted organic standards and schemes
Wherever you see the Soil Association organic symbol on products, you can be sure they have been produced to the highest animal welfare and environmental standards. The schemes we operate enable businesses not only to demonstrate compliance to specific standards but also to highlight a high level of competence and integrity in their offering, enabling a marketing advantage.

The Soil Association standards incorporate the EU organic regulation. Certification to this scheme permits licensees (certified operators, licensed under contract) to market their food and farming products as organic anywhere within Europe and in association with the Soil Association organic symbol. The Soil Association symbol scheme includes:

- Food and farming products (including production, processing, packing and distribution)
- Textiles Soil Association Certification certifies to the Global Organic Textiles Standard (GOTS) and Textile Exchange schemes
- Health and beauty Soil Association Certification certifies to international cosmetics organic standards as part of the COSMESHE scheme.

Catering Soil Association Certification owns and operates the Food for Life Catering Mark, an optional certification scheme for catering operations using local, seasonal, sustainable, unprocessed and organic ingredients.

Trade support
We are committed to supporting the growth of the UK organic market, and work with businesses across the sector to achieve success. Our trade support activities include:

- Lobbying government and retailers on behalf of organic consumers and businesses to invest in production and marketing of organic products
- Supporting market developments – bringing together links in supply chains and leading initiatives such as the Food for Life Catering Mark
- Organising Organic September and other marketing events and opportunities for organic businesses and retailers to work together to promote organic products
- Staging annual Organic Awards, highlighting products and recognising enterprise and innovation
- Facilitating opportunities for organic businesses to exhibit at global trade shows and understand wide-awake markets for organic
- Staging ‘meet the buyer’ events with retailers, enabling producers to reach a wider market
- Organising trade briefings to share latest news and market data in the organic market, to support well informed and effective marketing of organic products
- Providing learning and networking events for organic farmers, growers and newcomers to the industry, facilitating the sharing of best practice
- Providing marketing support by publishing evidence-based advertising claims agreed by the Committee of Advertising Practice (CAP) Copy Advice Team, who write and maintain the UK Advertising Codes that are administered by the Advertising Standards Authority
- Providing dedicated business development support across all sectors to help market development, including specialist advice on export opportunities.

For more information about Soil Association Certification please see our website at sacert.org

For specific trade support services please contact:

- Chief Executive, Soil Association Certification: Bob Sexton, news@soilassociation.org
- Meat, fish, poultry and grocery: Lee Holdstock, lbholdstock@soilassociation.org
- Dairy and fresh produce: Finn Cottrell, bcottrell@soilassociation.org
- Health, beauty and textiles: Emma Reinhold, ereinhold@soilassociation.org
- Catering: Mike Bond, mbond@soilassociation.org

OFGEM MARKET REPORT 2014

Researched and written by Martin Cottingham (Independent researcher and writer). Soil Association project managers: Finn Cottrell and Simon Martin. The author and the Soil Association would like to thank all those who completed survey questionnaires, provided information or granted interviews. We are particularly grateful to the companies, organisations and individuals listed below for their input and contributions.

Some work for this publication was undertaken jointly with the Organic Research Centre as part of the research project ‘Data network for better European organic market information’ (OrganicDataNetwork). This project has received funding from the European Union’s Seventh Framework Programme for research and with coordination and supervision under grant agreement No. 289376. The opinions expressed in this contribution are those of the author and do not necessarily represent the views of the European Commission.

THE ORGANIC CONSUMER

Main data – YouGov/Soil Association poll. All figures, unless otherwise stated, are from YouGov plc. The total sample size was 2,072 adults, of whom 95% were identified as organic consumers (ie they had purchased organic in the last year). Fieldwork was undertaken between 10 and 11 February 2014. The survey was carried out online. The figures have been weighted and are representative of all GB adults (aged 16+). Additional material from Nielsen, Kantar Worldpanel, Leapfrog Research/Organic Naturally Different Campaign and Natusi and Organic Products Europe.

THE UK ORGANIC MARKET

Multiple retail and product category data from Nielsen. Data for multiple retailers & from Nielsen for both 2013 and 2012 for comparative purposes. Kantar Worldpanel data was used in the 2013 report which reports the multiple retailer market size at a lower level. Independent retail data mainly from Soil Association research and Soil Association Certification data. Information for individual multiple retailers from Karen Pole and Kris Comberford ( Tesco), Tom Harvey (Marks and Spencer), Brian Hickey (Oriade), Lisa Bergmann (M&S), Helen Jones (Sainsbury’s) and Marianne Dowley (Waitrose). Additional input from Polly Atterbury (Riverford), Mike Bond (Soil Association), Sarah Brown (P&G), David Carpenter (Queensmead Natural Foods), Harris Dove (Textile Exchange), Steve Elling (Community Foods), Howard Gray (McDonald’s), John Sherwood (Pep & Marype), Graham Jones (Lloyds Europe), Claudia Kendler (GOTS), Sis Lennons (Tea Yeas), Nicky Porter and Michele Power (Neils Yard Remedies), Maarten van Perlo (Soil Association). Saša Mitrović (PeopleTree). Mark Powell (Woodland), Woodland (Organic Farmers’ Union) and Andrew Ireland (Boots); Katherine Pye (Daylesford Organic), Emma Reinhold (Soil Association), Matuzs Stochaj (Constituents’ Clothing), Sue Thompson (Europe). All Week (Essential Care) and Ben Woodgate (Whole Foods).

ORGANIC FARMING IN THE UK

Overview – Liz Bowles (Soil Association); land area, producer numbers and conversion – Debra statistics; arable – Andrew Trump (Organic Arable); horticulture – Ben Raskin (Soil Association); beef and lamb – Stuart Vile (Meat & Livestock); pork – Organic Research Centre; poultry – Andrew Gibson (Two Sisters); eggs – John Sawyer (Stonegate); milk – Richard Hargreaves (Organic Milk Suppliers’ Federation); aquaculture – Alex Mariniere (Aquaculture), national trends Endel – England; Liz Bowles (Soil Association); English producer survey: Catherine Gerand (Organic Research Centre), Northern Ireland: Norma Wright and Oisin (ARDO), Scotland: David Mickle (Scottish Agricultural College), Wales: Tony Little (Organic Centre Wales). THE GLOBAL CONTEXT

Helga Wilser (FIBI)

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DESIGN

Lobe Design (Lucy@lobedesign.co.uk)
A Triodos loan helped Tom Mettyear and Mark Sparrow to buy **Haddon Copse Farm**, a 30 acre organic smallholding in the heart of Dorset.

**Café Ode** is owned and run by award winning chef Tim Bouget. Triodos Bank helped to finance the development of the cafe space which boasts a number of sustainable credentials – sourcing a mixture of quality local, seasonal and organic produce.

**Neal’s Yard Remedies** is a multi-award-winning organic health and beauty company. With the help of Triodos Bank, Neal’s Yard Remedies has grown substantially and is now one of the UK’s leading organic brands offering the largest selection of organic, natural and chemical-free beauty products in the UK.

Triodos Bank has been helping organic businesses grow for almost 30 years. Contact us to find out how we can help you.

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