

# Nurturing growth, sustainably.



Triodos Bank actively supports the organic market by lending to businesses throughout the organic supply chain – from farmers, producers and processors to retailers and restaurants.

Find out more at  
[triodos.co.uk/organic](https://triodos.co.uk/organic)

Triodos  Bank

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## Organic Market 2019



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## Foreword

It's been another year of steady growth in the organic market. With a 5.3% increase in organic sales, it's refreshing to have one area of life with year-on-year consistency.

There's no lack of potential for disruption as we slide towards March 2019 with little clarity on Brexit. But it's not just politics that could be about to turn our world upside down. The rapid rise in vegan and plant-based eating has been the biggest consumer trend this year, with its own risks and opportunities. The meat and dairy debate is a



complex one. The Soil Association's message is 'less but better'. 'Better' is ideally organic, and we would like to see the end of ultra-intensive, grain-based livestock systems, which can be highly polluting, as well as inhumane. We acknowledge that over-consumption of livestock products is damaging for the environment, and accelerating climate change. But we support the role that plant-eating animals can have in building soil fertility, supporting habitats on which much wildlife depends and providing high quality nutrition, especially to people on low incomes.

### Unfolding impact of the weather

This has been a tough year for farmers and growers. We staggered from the freezing temperatures of February 2018's 'Beast from the East' to the longest, wettest spring I can remember, then into the most intense drought since 1976. On my own farm, we couldn't plant any cereals on our clay land and made only 60% of the silage we planned to. We also put our dairy herd onto once-a-day milking in July to reduce the heat stress of the afternoon trek to the parlour, and to save grass.

The impact of the year's weather is still unfolding. Organic feed prices have risen by over 20% and the late winter will be a testing time for the dairy sector, as silage stocks diminish. Some yields from produce were down by half because of the heatwave. We are all hoping for an early spring.

### Fighting for farmers and the environment

Future support arrangements for farmers post-Brexit have started to become a little clearer with the publication of the Agriculture Bill 2017-19, which is still going through parliament. We welcome its: seven-year transition and public goods approach to future payments; spotlight on fair play between farmers and first buyers; and farmer-led research.

But we have pushed hard for soil, biodiversity and human health to be specifically listed as public goods in the bill, so that they are clearly eligible for future support.

### Supporting organic

It's good to see that organic products continue to be ever more relevant to more people. They are making ethical choices on food and drink and other aspects of daily life such as waste, packaging and energy.

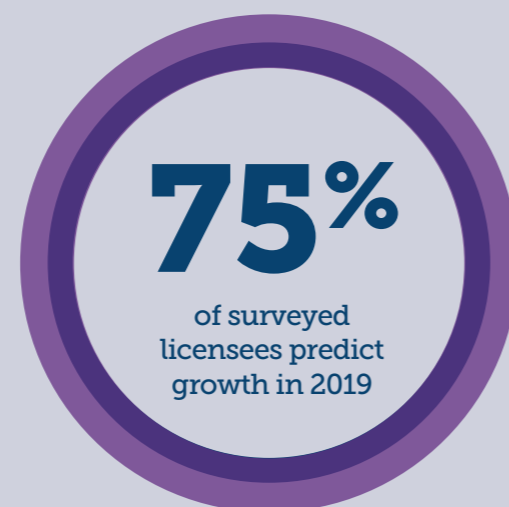
I continue to be impressed with the constant innovation coming from the growing number of businesses and brands, and the variety of products now available, in the organic sector. It's the perfect time to shout about the benefits of organic – 'Food as it should be'.

**Helen Browning,**  
Group CEO, Soil Association

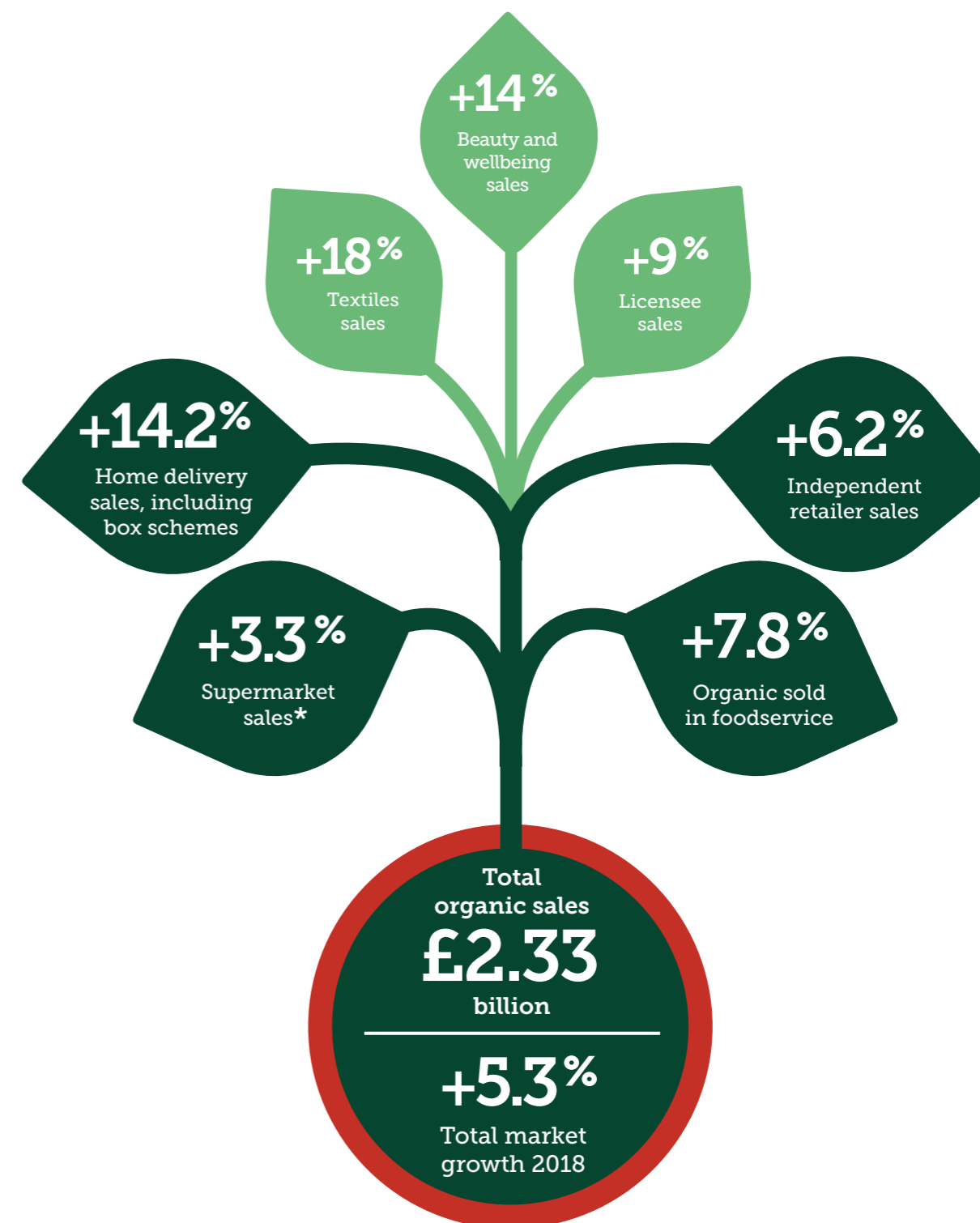
# Executive summary

The UK organic market continues to experience steady, healthy growth, with sales increasing by 5.3%. That means almost £45 million a week is spent on organic in the UK.

- By 2020, the UK organic market is on target to be worth £2.5 billion.
- The market is now in its eighth year of growth.
- Home delivery of organic, through online and box schemes, is growing fastest, at 14.2%. This channel accounts for 14% of all sales. By 2023, home delivery is on target to make up a quarter of all sales of organic in the UK.
- Supermarket sales of organic (excluding discounters) increased by 3.3%\*. Overall, supermarkets reduced their share of the organic market again. They have a 65.8% share of sales, compared to 67% in 2017.
- Independent retailers maintained strong sales of organic, with sales increasing by 6.2%. New independent retailers and wider ranges from wholesalers have helped to improve the choice of organic products.
- Key categories driving growth in the market are: beers, wines and spirits and chilled foods. Fresh produce and canned and packaged grocery are also experiencing solid growth.
- Organic beauty/wellbeing and textiles had another year of double-digit growth at 14% and 18% respectively.
- Soil Association Certification licensee sales are up 9%, well ahead of market growth.
- Sales of organic into foodservice have risen by almost 8%, helped by spend through Food For Life award holders, despite cuts in public spending budgets. There was an increased demand from high street restaurants in response to diners looking for sustainable options.
- Packaging and wider environmental issues are continuing to influence shopper choices.



## 2018 Growth in sales of organic



\*+3.3% supermarket sales Source: Nielsen Scantrack Total Coverage Food & Drink (supermarkets and convenience stores) 52 weeks ending 29th December 2018

# UK organic market

Across all channels, the UK organic market is growing – for the seventh year in a row. It's on target to reach £2.5 billion by 2020, as predicted in last year's *Organic Market Report*. Overall, sales have increased by 5.3%, and for Soil Association Certification licensees, they've grown ahead of the market, by 9%.

## Trends

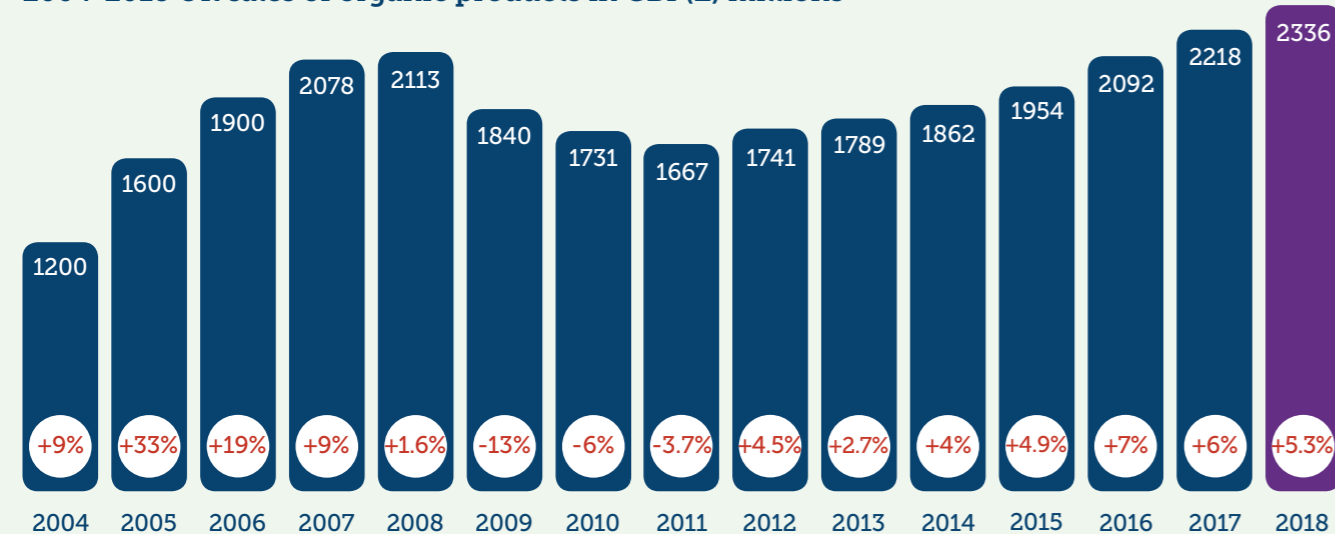
**Health is a key motivator for the majority of shoppers, with more consumers considering labels when they decide what to buy.** UK consumers are trying out new diets, reducing the amount of meat they eat or not having it at all, and cutting out gluten and dairy. *Ethical Consumer* research found a 52% increase in the number of people identifying as vegetarian and a 104% rise in veganism since 2016. These consumers are often pre-disposed to buying organic. For example, when new products are labelled 'free from' and 'organic', it offers double assurance and is a signpost to healthy choices.

**Since 2013's horse meat food scare, provenance has been another key motivator driving consumers.** More are concerned about the authenticity of products and organic labelling provides integrity and trust. Consumers want the complete reassurance that organic gives.

**Consumers are becoming more conscious about what they buy.** They're choosing organic because they have more knowledge of how it guarantees higher animal welfare standards, contains fewer pesticides with no added artificial additives or chemicals, and is better for the planet. It also meets consumer demand for less packaging and products from sustainable farming sources.

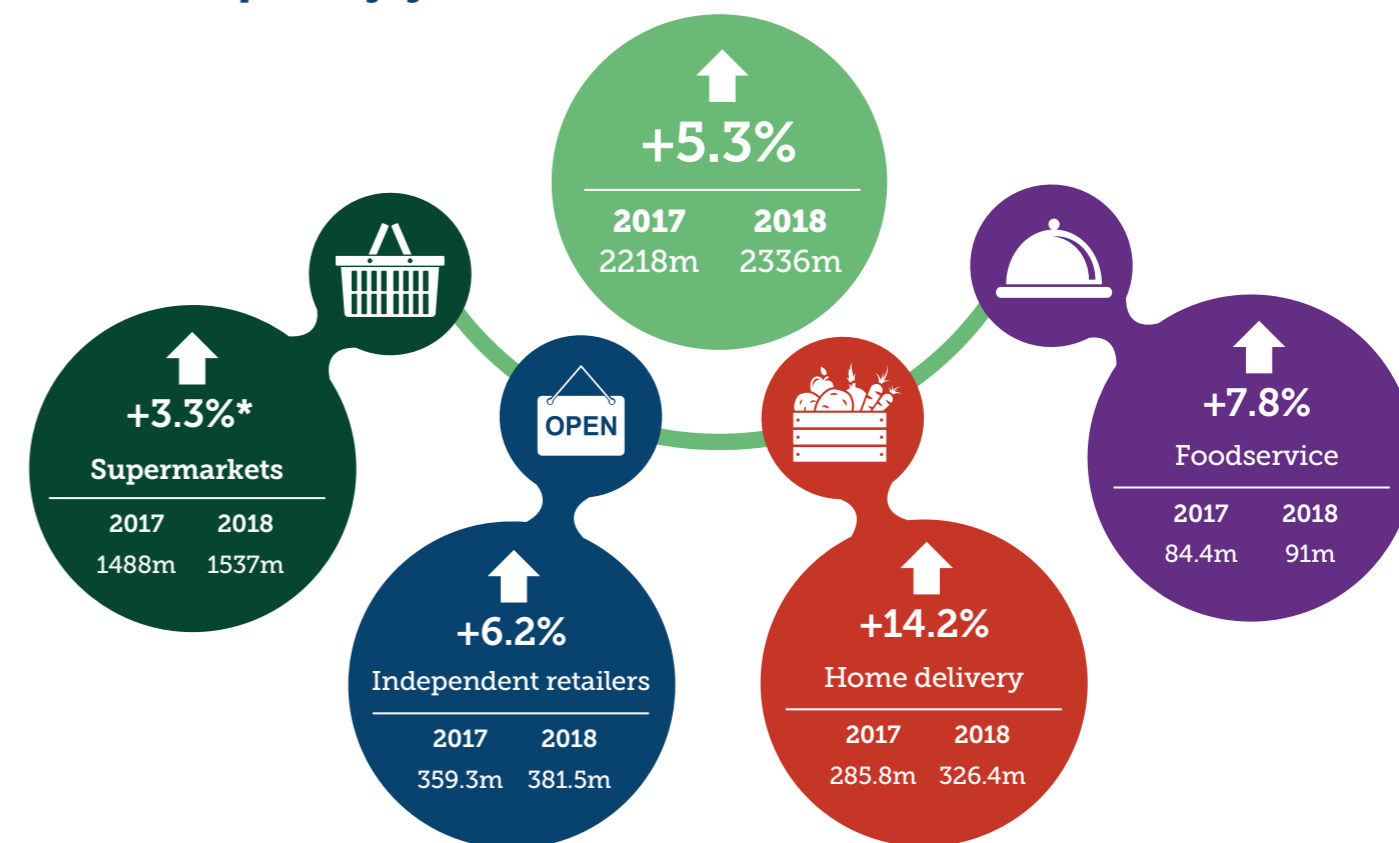
**Foodservice and eating out are an emerging and exciting channel for organic.** This year sales grew by 7.8% as demand continues to be driven both by Soil Association's Food for Life Served Here with £19.5m spent through this scheme and on the high street. More outlets are signing up to the Organic Served Here award, making organic more accessible on menus across the country.

2004-2018 UK sales of organic products in GBP(£) millions



Source: Soil Association Market Reports

2017-2018 Channel Growth in GBP(£) millions and percentage growth



Share of sales growth 2018 v 2017 by channel

	2017	2018	
Supermarkets	67%	65.8%	↓
Independent retailers	16.3%	16.3%	=
Home delivery	12.9%	14%	↑
Foodservice	3.8%	3.9%	↑

\*Nielsen Scantrack Total Coverage Food & Drink (supermarkets and convenience stores) 12 weeks ending 29th December 2018

## 2017-2018 breakdown in product shares of UK food and drink organic market and % change in value

Product	% share of food and drink	Year -on-year growth
Dairy	28.4%	+1.9
Produce	24.3%	+3.6
Canned & packaged	16.5%	+6.1
Meat, fish & poultry	10.1%	+1.1
Babyfood & drink	9%	-4.8
Confectionery/soft drinks	3.8%	+2.3
Chilled foods & deli	3.2%	+26.8
Beers, wine & spirits	2.8%	+21
Bakery & cakes	1.2%	-2.7
Frozen	0.7%	+3.7

Nielsen Scantrack Total Coverage Food & Drink (supermarkets and convenience stores) 52 weeks ending 29 December 2018

## Growth categories

**Free-from, alternative choice and healthy categories are becoming more innovative and driving growth in Canned & Packaged Grocery.** This includes: non-dairy milks; vegetarian and vegan options and snacks, such as energy bars with protein claims; flavoured teas with health properties; healthy cereals and toppings, such as porridge and granolas; flaxseed; dry nuts; nutty butters.

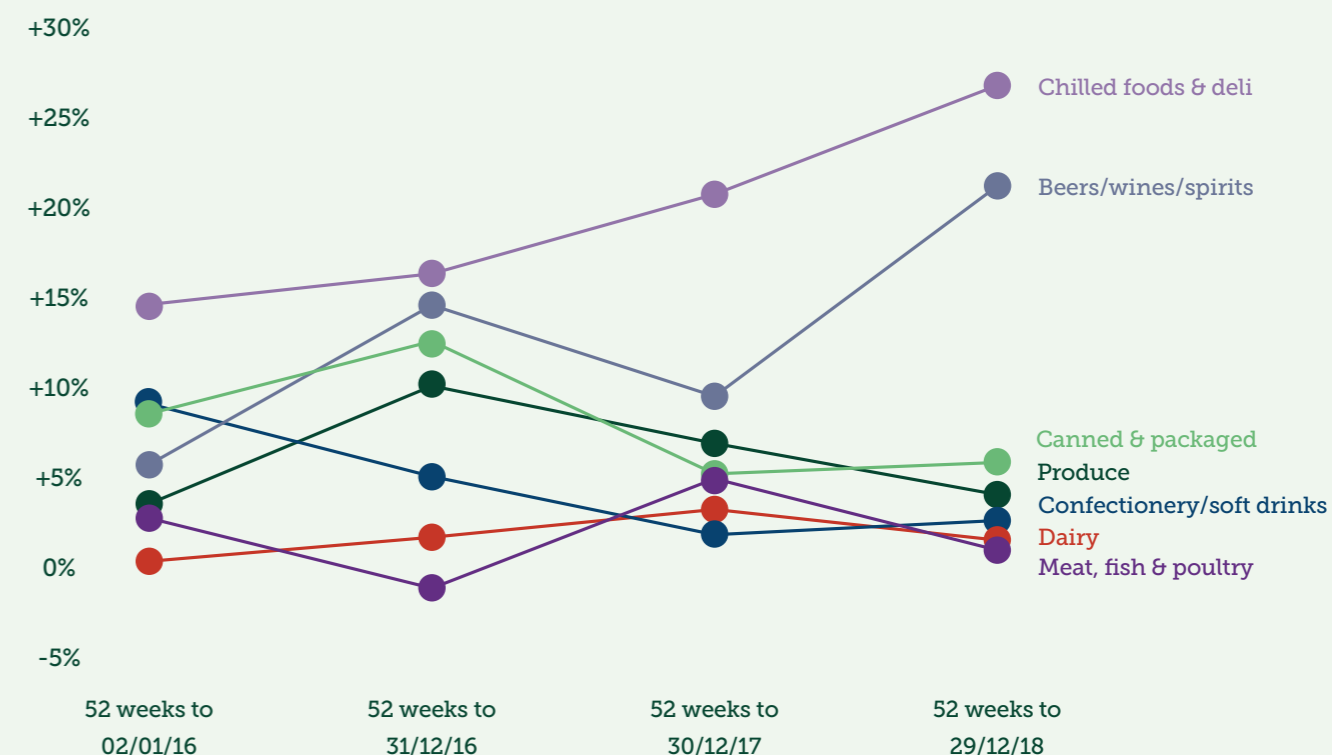
**Sales of fresh fruit, salad and vegetables, have increased by approx. £15 million during the year.** Figures also show that the chilled convenience sector, including tofu and fresh vegetarian products, grew by over 25% in value.

**Large Fast-Moving Consumer Goods brands have launched new organic products this year, attracted by growth in the sector and experience in European and US markets.** This includes Knorr, Red Bull, Carte D'Or, Babybel and Tropicana.

Around  
**1.5%**  
of the total  
UK food and  
drink market  
is organic

Sales of  
organic through  
home delivery  
now account for  
**14%**  
of all sales

## 2015-2018 trends in food and drink sales by key categories (% growth or decline in value)



Nielsen Scantrack Total Coverage Food & Drink (supermarkets and convenience stores) 52 weeks ending 29 December 2018

## Changes in shopping habits

**Online ranges of organic offer a much wider choice of products.** Online growth was 14.2% in 2018, the fastest growth of any channel. Ocado, for example, has over 3,000 lines. Organic products account for 12% of online grocery sales. Many millennials hone their shopping skills on the internet, checking product ratings and reviews to help with decision making

**The UK organic market continues to be dominated by three main supermarkets – but discounters, like Aldi and Lidl, are now driving sales in the sector.** Over more than 1.5 million new households shopped in Aldi or Lidl in the last year. They are stocking more organic products, and the big three supermarkets – Sainsbury's, Tesco and Waitrose – need to try harder to maintain share.

**As more consumers shop locally and often, the independent organic retail sector is flourishing.** This can be lucrative for independents and supermarkets alike. Often, an organic shopper's basket size is more than double the value of someone shopping for non-organic items. Independents offer specialist knowledge, and innovative products and approaches, which appeal to consumers who don't want to buy traditional choices.

# Supermarkets

Overall sales of organic products in supermarkets increased by 3.3%\*, making it another encouraging year of growth.

**Discounters, like Aldi and Lidl, are setting the agenda for organic in supermarkets.** According to Kantar Worldpanel, these two discount supermarkets have more than 5% share of the UK organic market (higher than Marks & Spencer), even though they only stock a small range of core everyday lines. This trend is set to continue, especially as IGD predicts that £3 in every £10 of growth in the UK food and grocery market over the next five years will come from discounters.

**Discounters' interest in stocking organic is driving the major supermarkets to see it as a 'must have' in their ranges.** The top three organic retailers, Waitrose, Sainsbury's and Tesco, all have a similar share of organic supermarket sales – around 23% each. Morrisons, Asda, and Co-op are adding organic to their ranges, taking share away from the three largest players.

**Smaller vegetarian and free-from brands have gained new listings in some supermarkets during 2018.** Soil Association Certification licensees such as Tideford Organics, Clive's

Pies and Bio-tiful Dairy are benefiting from new listings, as are non-meat options, such as cheese and eggs. Indeed, the move to less meat had a declining impact on organic meat sales through supermarkets. Sales of meat through independents and box schemes are holding up better.

**Traditional growth categories for supermarkets, such as dairy, baby food and chocolate, had a slower year in 2018.** For dairy, this is partly because space was allocated to non-dairy brands. Organic yogurts also faced stiff competition on price and maintaining listings in the key supermarkets. For chocolate and baby food, less new brands came to market.

**Over 15% of total sales of carrots are organic.** Other Nielsen data shows products which represent the biggest share of their category are bananas at 9.4%, milk with 5.8%, eggs at 7.8% and tea with 6.7%.\*



**Exciting growth came from less expected categories such as organic wine, fruit and vegetables.** Aldi's organic wine range, received a lot of media attention in 2018. It is a key area of focus for the discount supermarket's organic range. Blueberries were the fifth fastest growing grocery product in 2018 and avocado volumes were up over 8%, according to The Grocer.

## Highlights

- Sales of organic products in supermarkets grew by 3.3%\*
- Smaller vegetarian and free-from brands have gained supermarket listings and this trend shows no signs of receding
- Supermarkets need to continue to increase their range and focus on organic products to keep up with discounters, which are setting the agenda in this channel



\*Nielsen Scantrack Total Coverage Food & Drink(supermarkets and convenience stores) 52 weeks ending 29th December 2018

# Home delivery

Online sales of organic are going from strength to strength, with a 14.2% increase this year, the highest since we started tracking sales through this channel.

**By 2023, we expect home delivery's share of the total UK organic market to account for a quarter of total sales.** This is based on sales this year increasing from a 12.9% to 14% share of all organic sales. Plus, nearly a quarter of British people do their main shop online now (Mintel). Online grocery sales are expected to increase by nearly half in the next four years (IGD), providing further opportunities for growth. Organic sales should also increase as more retailers and brands start to use the channel. Some big retailers of organic aren't yet offering home delivery grocery shopping, including Marks & Spencer and Lidl. When they do, accessibility and availability of organic will increase further.

**The big player in online sales of organic continues to be Ocado, which has an extensive range of over 3,000 products.** This year, again, Ocado's sales of organic increased by over 15%. Amazon, too, continues to serve as an alternative channel for well-known organic packaged brands.

Other large home delivery businesses continue to perform well and the trend towards less packaging could help increase their future sales further.

**Smaller home delivery businesses have had an even better year, with an increase of over 30% in sales of organic.** New box schemes and others have enjoyed significant increases. Some organic meat box businesses have benefited from consumers choosing to shop for meat outside supermarkets.

**Other online delivery schemes are becoming popular and providing another option for consumers looking for less packaging.** Doorstep delivery service Milk & More, for example, overtrades substantially on organic bottled milk. Traditional box schemes, which tend to leave produce unpacked, are enjoying new opportunities and renewed interest from consumers. This is unsurprising considering how reducing packaging has become a priority for the organic consumer (see page 23).

## Highlights

- More people are buying organic products online, with a 14.2% increase in sales this year
- Nearly a quarter of British people do their main shop online now (Mintel) and by 2023, home delivery's share of the total UK organic market is expected to be 25%
- Box schemes selling products with less packaging have a unique opportunity to drive renewed interest in home delivery



# Other Retail Outlets

Organic being sold through retailers other than supermarkets continues to show high levels of growth and this looks set to continue. There's been a 6.2% increase in sales this year, almost 3% more than supermarkets.

Sales are being driven by the move to plant-based and healthier diets, local shopping and the increased importance of ethical choices, including packaging-free options. This sector is often preferred for its exclusive organic brands not available in supermarkets.

## Independent shops and smaller chains

Estimates suggest that there are between 800 and 1,000 independent shops and smaller chains selling and promoting organic products. These include delis, health stores, specialist butchers, bakers, greengrocers and foodhalls in high end stores.

There is a growing demand for organic across central London chains and upmarket convenience stores. According to Kantar Worldpanel, there are more shoppers of organic in England's capital and the south of England. Additional investment in chains, such as Planet Organic, will help further develop organic in London.

Grocery and dry goods are the most popular category for 56% of independent licensees. A large number of smaller individual retailers are selling selected organic products to bolster their healthy choices.

This offers greater availability of quality organic brands which are often difficult to find elsewhere.

According to Soil Association Certification surveys, top brands, favoured by independent retailers are Biona, Suma, Clearspring, Infinity Foods and Meridian Foods.

Organic food hubs are offering producers more opportunity to sell to independent retailers. These businesses distribute and market locally grown food, and are helping to develop the sector in many of the UK's larger cities.

Independents are set up for plastic-free shopping, a key consumer trend this year. Many are focusing on minimising their waste as much as possible with much more loose fresh produce and refillable options for staples. Planet Organic, as an example, have introduced a new 'Unpackaged' range in four stores and Better Food Company have 40 organic products with no packaging.

## Larger chains, including convenience store chains

Organic is a key part of ranges in larger independent store chains, such as Holland & Barrett.

Convenience store chains, like Spar, Costcutter and Nisa, are stocking more basic organic lines, as demand for them increases. Products include everything from milk and eggs to dry goods brands, such as Pukka and Green & Black's.

Figures from Mintel found that more than two in five (45%) of British people say they regularly visit convenience stores to do a top-up shop, so it is very important that organic is accessible in these smaller stores.

Non-food organic items are popular in larger stores. One in five of our retail licensees say that supplements are the most important category in their independent store, even more so for the larger health chains.

Independent retailer sales growth

**+3% more**  
than supermarkets

Between 800 to 1000 independent shops in UK sell organic

## Organic food trends

### Products influencing sales of organics in independents

- Plant-based foods, such as soya and oat milks
- Vegan foods, such as yeast flakes, tempeh and jackfruit
- Sea vegetables
- Fermented and gut-friendly food and drink, such as sauerkraut and kefir
- Energy snacking, including protein balls and bars and cereal toppings

## Wholesalers

Good growth across wholesalers of organic reinforces increased sales of organic in independent retailers.

Wholesalers are helping to develop total supply chains for organic through working directly with processors. They make exclusive products available for the independent market reducing the need for on shelf price competition with the supermarkets. Many key brands stocked in the independent sector are brought to market by wholesalers themselves.

Top selling organic products through the wholesalers are being driven by healthy food trends.

They include: flavoured teas, healthy cereals, supplements, specialist drinks such as coconut waters and kombuchas, vegetarian options and fermented products.

## Farm shops and farmers' markets

This is a key route to market for organic, as local food and the connection to the actual farm that produced it, is a motivator for many organic customers.

The trend for 'hyper local' food is a big driver of sales in this sector. Cutting their food miles and getting what they buy from its original source is a key motivator for organic consumers. For Soil Association Certification licensees, opening a farm shop and delivering locally has been a useful way of diversifying their income over the last five years.

Popularity of local food markets continues to offer smaller organic producers a platform for launching new products and gaining brand support before moving to independent retailers.

National agricultural suppliers are increasing sales of organic by stocking wider ranges of organic feed, grains, gardening supplies and compost for ethically minded producers.

## Highlights

- There's been a 6.2% increase in sales for other retail outlets this year.
- The consumer demand for more vegetarian and vegan options has opened up opportunities for the independent sector
- Independents are quicker to offer 'unpackaged' options, a trend that is expected to accelerate in the coming year



# Foodservice and eating out

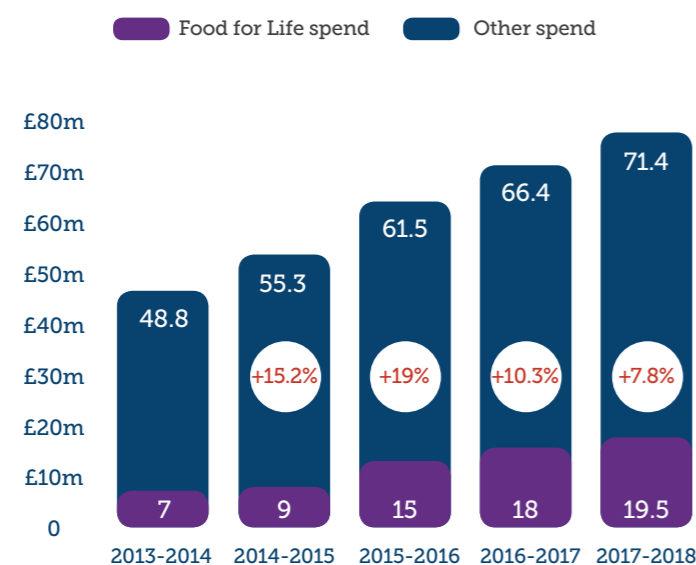
The growth of organic into foodservice increased steadily again this year – by 7.8%. Soil Association's Food for Life Served Here and Organic Served Here awards continue to contribute to driving demand, with £19.5 million spent on organic through these schemes.

More licensees are taking advantage of the exciting potential for organic in foodservice and eating out. It's a less developed channel, accounting for around 4% of the organic market. But as more meals continue to be eaten outside the home, or through delivery services, the potential in foodservice is significant.

**There's lots of opportunity for businesses to take advantage of the growing foodservice market in public health and education.** The public sector spends around £2.4 billion a year procuring food and catering services – accounting for 5.5% of total UK food sector sales. Supplying the public sector can be more complex than selling into retail yet many organic businesses have secured large volumes and long contracts through negotiations and offering relevant products.

**The potential to grow The Soil Association's Food for Life Served Here scheme further is high.** Double digit increases have slowed following cuts to local authority budgets and

**Organic spend in foodservice from 2013 to 2018 (£ms)**



political uncertainty in 2018. But sales through the scheme still rose by 8.3%.

**More wholesalers are now certified organic which is helping producers supply the public health and education sectors.** This year, the number of certified wholesalers increased by 6%. Many caterers in the public sector prefer to work with wholesalers which can deliver a wide range of products at one time, supply larger volumes and aggregate invoices. Soil Association Certification is

supporting wholesalers to work with producers to take their product to market, improving the overall availability of organic.

**Developing supply chains is key to supplying the foodservice sector.** We run events which connect the foodservice supply chain, including helping suppliers link up with award holders looking for organic products through the Food For Life Supplier Scheme. Educating chefs about organic is also important for increasing demand for ingredients in both the public and private sectors.

**By spring 2019, the number of cafes and restaurants signed up to our Organic Served Here award scheme is expected to have tripled to around 70.** That means more eating out venues will have organic options on their menus. Organic Served Here celebrates cafes and restaurants with 15-100% organic on the menu. It awards one to five stars according to how much organic is served.

**Research shows organic in eating out is a growing area of customer demand – which is yet to be met.** Our 2018 Eating Out survey found that half of people would be more likely to choose a restaurant that highlights ethical or sustainable credentials. Over two in five (43%) think a restaurant or cafe will be better than others if they see organic on the menu or drinks list. But nearly three quarters (72%) believe that it is not easy to tell if a restaurant or cafe sells organic food or drink.

A Soil Association survey revealed that demand for organic in eating out isn't being met at popular family attractions. Soil Association's *Out to Lunch* survey found that adult meals at popular family attractions are typically healthier than children's meals. Royal Botanic Garden, Edinburgh, which serves seasonal and organic produce from their own market garden topped the Out to Lunch league table in 2018.



## Highlights

- Sales of organic in foodservice increased by 7.8% this year to £90.9 million
- Soil Association's Food for Life Served Here and Organic Served Here awards have increased demand in foodservice and eating out, with a 8.3% rise in the amount spent on the schemes in 2018
- Connecting supply chains, educating chefs and getting more organic options on menus is key to growing organic in this sector



# Beauty and wellbeing

**In 2018, sustainable beauty and wellbeing became mainstream. The certified organic and natural sector continued to lead this growth as more consumers wanted to be sure that what they were buying delivered on trust, integrity, sustainability and benefited the wider environment.**

**The market for certified organic and natural beauty in the UK is at an all-time high.** This looks set to continue as more millennials and Generation Zs come into the market, more retailers stock certified brands and sustainable beauty becomes increasingly relevant. Trends driving the market include the rise of self-care and 'wellcare', a demand for transparency, the war on plastic and packaging, plant-based beauty, and support for entrepreneurial, innovative and ethical brands.

**The organic sector still needs to shout loudly about what certified organic and natural beauty is and what it delivers.** 'Greenwashing' is still an issue, two years on from Soil Association's groundbreaking *Come Clean About Beauty* report.

**More and bigger brands, including L'Oreal Garnier, are signing up to Soil Association COSMOS certification.** They are excited by the opportunity to showcase their credentials and reassure consumers they are making responsible choices.

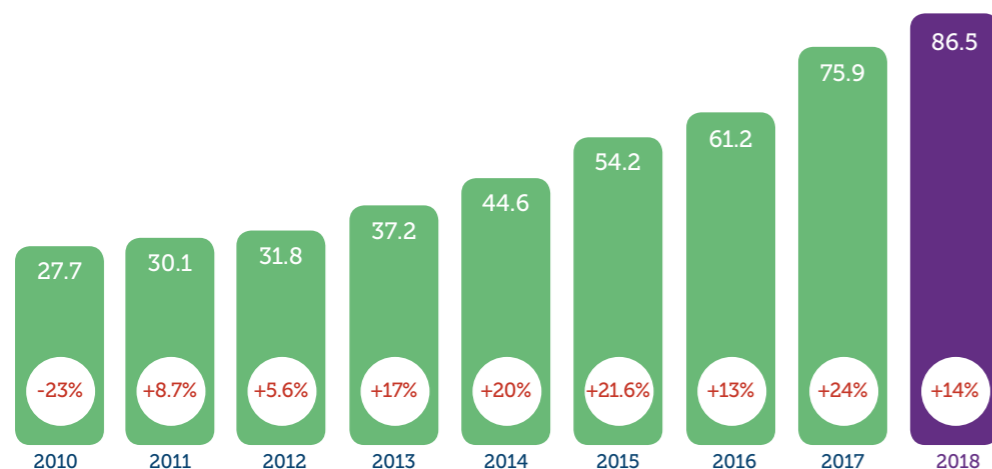
An ever-growing number of brands are becoming COSMOS-certified organic or natural. In 2018 there were over 10,000 COSMOS-certified products across Europe, twice as many as the previous year. Applications to Soil Association Certification for COSMOS certification is at an all-time high.

The availability of ingredients certified to COSMOS standards is also becoming less of an issue with over 100% growth in the number of certified ingredients. The transfer of products to COSMOS is out-pacing expectations. These developments are clarifying standards and labelling for consumers.

For more detailed information on the sector, you can read our *Organic Beauty Market Report*. It combines the latest industry research and thought-leadership with insights and market data from our pioneering licensees. The report puts a spotlight on key themes and trends for 2019 as well as the exciting role certified organic and natural brands can continue to play in the future of beauty and wellbeing.

[www.soilassociation.org/beautymarket/](http://www.soilassociation.org/beautymarket/)

**UK sales of certified organic and natural health and beauty products in GBP (£) millions**



\*BDIH, ECOCERT, ICEA & NATRUE

With increased demand for organic and natural beauty products, Soil Association teamed up with four other European partners to develop a new standard for organic and natural cosmetics, known as **COSMOS**. Together, these partners have created one harmonised international beauty standard which now certifies 80% of the global certified organic and natural market. There are two consumer certification schemes: organic and natural.



**£86.5 million**

Sales of certified organic and natural beauty products in the UK

**+10k**

Certified COSMOS products across 794 brands - 100% year-on-year increase

**+14%**

Year on year growth of certified organic and natural beauty products

**+11k**

Certified organic and natural ingredients on the COSMOS database

**8th**

Year of consecutive growth

## Highlights

- The market for certified organic and natural beauty in the UK is at an all-time high, with a 14% year-on-year increase
- This looks set to continue as more millennials and Generation Zs come into the market, more retailers stock certified brands and sustainable beauty becomes increasingly relevant
- More brands and bigger brands, are signing up to Soil Association COSMOS certification, excited by the opportunity to showcase their credentials and reassure consumers they are making responsible choices



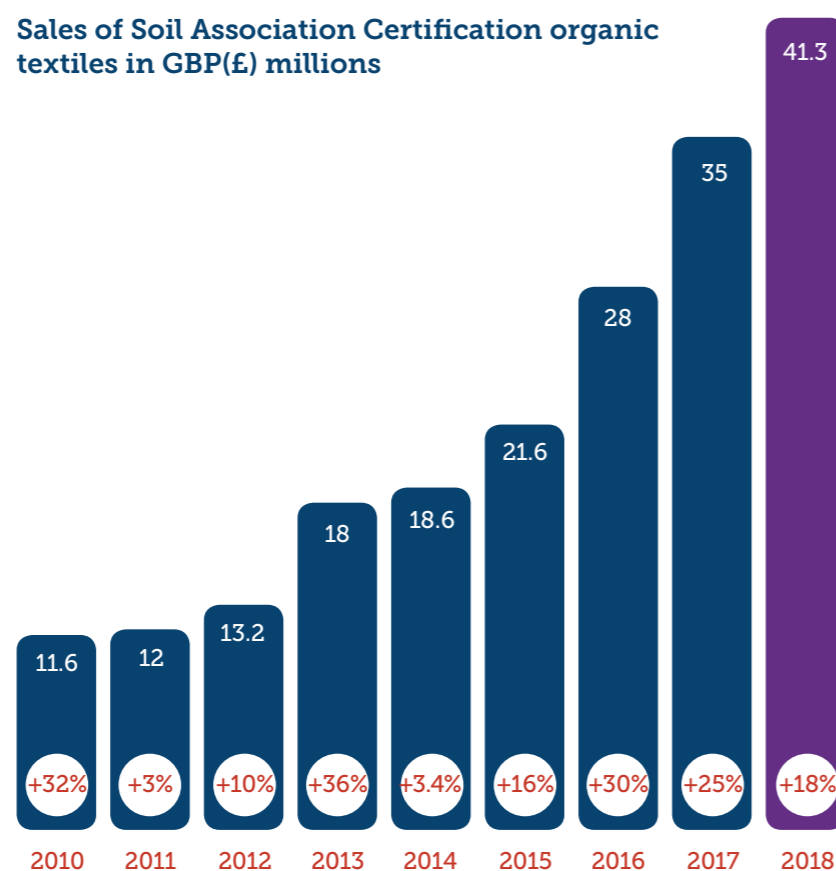
# Textiles

Sales of Soil Association Certification certified textiles increased by 18% in the UK in 2018, making the market worth £41.3 million.

**Consumers are demanding more sustainable alternatives to their everyday textile products.** Spending on ethical clothing increased by 19.9% in 2018. A 2018 *Fashion Revolution* survey found that more than three in five (61%) people want to know how retailers are minimising their impact on the environment, and what they're doing to protect workers' human rights.

**Organic textile certification is meeting increased consumer expectations of authenticity and transparency.** Global Organic Textile Standards (GOTS) certified facilities and retailers grew by 10% in 2018 (Textile Exchange) and organic cotton fibre production grew by 10% (FIBL). Retailers' long-term commitment to integrating organic cotton into product lines is overcoming barriers to increasing its use, including price, supplier resistance, and availability. Their commitment is essential to encouraging growth in the supply and integrity of organic cotton, and provides a business case to inspire farmers.

Sales of Soil Association Certification organic textiles in GBP(£) millions



**Global Organic Textile Standards (GOTS)** is the gold standard for the sustainable processing of textiles made from organically-grown fibres such as cotton or wool.



**Organic Content Standard (OCS)** certifies any non-food product containing 5-100% organic material.



**Political changes are putting pressure on the fashion industry to become more sustainable.** MPs asked top retailers how they are reducing environmental harm following the 2018 UK government enquiry into the environmental and social impacts of 'fast fashion'. And, as part of the Global Organic Textiles Standard (GOTS), Soil Association has signed up to support the United Nation's charter to achieve net-zero greenhouse gas emissions by 2050.

**Companies and consumers are trying to be more sustainable by using organic cotton in clothing, home textiles and feminine care.** More than half of garments sold in the UK are made from cotton (WRAP). So switching to more sustainable cotton alternatives is one of the biggest

opportunities for clothing retailers to reduce their environmental impact. Now, 38 companies have signed up to the Sustainable Cotton Challenge, an initiative managed by Textile Exchange, for which retailers pledge to use 100% sustainable cotton by 2025.

**More organic cotton is used across all textile sectors but sales have grown most in personal care, fashion and baby and childrenswear.** Homeware is another popular category as more retailers are selling organic mattresses and bedding in response to consumer demand.

**Textile Exchange research has found that organic cotton has many social and environmental benefits, which contribute towards meeting the Sustainable Development Goals.**

The research found that, in comparison to the production of conventional cotton, organic cotton reduces the: amount of bluewater (water taken from groundwater or surface water bodies via irrigation) involved in production by 91%; potential for global warming by 46%; and demand for primary energy by 62%. Social benefits of organic cotton farming include: increased income from organic premiums; food security through crop rotation; increased independence from seed companies; improved health thanks to the elimination of toxic agrochemicals; and better local infrastructure.

## Highlights

- Sales of Soil Association Certification textiles grew by 18% in the UK in 2018, making the market worth £41.3 million
- Spending on ethical clothing in the UK increased by 19.9% in 2018 (Ethical Consumer Market Report)
- Global Organic Textile Standards (GOTS) certified facilities and retailers grew by 10% in 2018



# Today's consumer and organic

Organic's integrity and values are aligned with many of today's consumers who continue to see it as a key signpost to health. It fits well with mindful consumerism, environmentalism, veganism and vegetarianism – trends which are dominating the market.

**Increasing numbers of people are choosing to eat more healthily which works well for organic as it's regarded as a healthy option.**

Recent IGD research found that 85% of shoppers claim to be actively trying to improve their diet. Organic offers reassurance to this consumer and works in harmony with the many other trends towards healthy eating, such as free-from, dairy-free and a flexitarian approach.

Indeed, many people are switching to a partially vegetarian or vegan diet. Ethical Consumer research found that 11% of people are vegetarian and 3% vegan – an increase of 52% and 153% respectively since 2016. In their Food and Drink Report, Waitrose call 2018 the year vegan went 'mainstream'.

Kantar Worldpanel reported recently that one in three food items are chosen for health reasons. University of Oxford scientists published research this year calling for more people to adopt a flexitarian diet in order to combat climate change, promote food sustainability and reduce pollution. This supports our call for people to eat less, but better (good quality) meat and fish.

**'Ethical', 'conscious' and 'mindful' consumerism describe a much greater percentage of shoppers who choose organic because they want to be less harmful to the environment and society in general.**

They have an increased awareness of the impact of their purchasing decisions. Ethical Consumer research, for example, found that over three in five people had made some dietary decisions for environmental or animal welfare reasons in the past year. Over a quarter of respondents to their survey stated that they had avoided buying a product, or using a service, due to its negative environmental impact. There's rising consumer pressure, for example, for businesses to reduce the amount of palm oil they use to help stop deforestation, as well as reducing packaging and cutting back on waste.

**People are spending proportionately less of their household income on food at home. So the quality of what they do buy could become more important.** Organic offers quality assurance, alongside animal welfare and environmental benefits. Research from the Office of National Statistics shows that the amount people spend on food and non-alcoholic drinks at home has halved in 60 years, from 33% to 16% of household income (Family Expenditure Survey).

Indeed, research from Euromonitor International shows that Britons spend less of their household income on food than any other country, apart from the US and Singapore.

The amount we spend on food could increase again as consumers realise that cheap food is not always the best ethical choice, and often creates more waste, creating bigger problems for the environment and the economy.

**Consumers are building different food routines and choices into their daily food and drink planning, following micro trends.**

The popularity of healthy juicing and smoothie-making, for example, is supporting sales of organic fruit and vegetables. Organic fermented products, such as kombucha, kefir and sauerkraut, are also popular as fermentation is seen to be a natural and healthy way of preserving food. Consumer awareness of cleaner labels, with simple ingredients and greater transparency, bodes well for organic.

## Triodos Case Study



Sieske Valk is an organic shopper living in London. She's proud to be a conscious consumer, even extending that to her personal banking with Triodos Bank, a specialist in supporting businesses throughout the organic supply chain.

'As a professional pet carer and yoga teacher, I live a very active lifestyle in a bustling city. The food I put into my body is vital, so I love to eat nutritious, plant-based goodies whenever I can and organic when possible.

I believe that humans, animals and the planet shouldn't have to suffer for my needs. That's why I tend to buy organic – and Fairtrade where I can – for everything that goes in and on my body, with minimal packaging and miles travelled.

Soil Association Certification makes buying food, clothes and beauty products so much easier as its labels help to identify genuine organic products. Thanks to certification, as well as banking ethically with Triodos, I'm reassured that my money is supporting businesses that align with my values.'

Find out more at [www.triodos.co.uk](http://www.triodos.co.uk)

Triodos Bank

## Highlights



- The plant-based and free-from food and drink trend will continue to positively influence the organic market in 2019.
- Only 15.7% of customers make up 78% of total organic spend on food and drink, suggesting a loyal customer base
- Organic overtrades among under 44 year olds, often in London and the south and from higher income households

**1 in 3**

food items are chosen for health reasons

**11%**

of people are vegetarian and 3% are vegan\*

\*Source: [www.ethicalconsumer.org/research-hub/uk-ethical-consumer-markets-report](http://www.ethicalconsumer.org/research-hub/uk-ethical-consumer-markets-report)

# Packaging for organic

The devastating effects of plastic on our natural planet has been one of the hottest topics of the year, due, in part, to *BBC1's Blue Planet*.

Soil Association Certification and its licensees are leading the way in finding more environmentally friendly ways to package products. Nearly 70% of all plastic waste in the UK is packaging (WRAP). If nothing is done to reduce the use of plastic, the amount of waste in the oceans will triple in the next decade, according to a UK government report.

Soil Association Certification has the only organic standards in the UK to include packaging. We've responded to the UK government's Resources and waste strategy for England consultation, with a call for minimising waste particularly avoidable plastic waste while promoting resource efficiency.

## Packaging is influencing shopper choices

We track consumer research about packaging and share it with licensees so they can take responsibility for reducing their own. From this, we know that environmentally-friendly and less packaging is a priority for consumers.

February 2018 Ipsos MORI research found that more than eight out of 10 people were 'very' or 'fairly concerned' about packaging when they made choices to buy products. Over a quarter (27%) expect companies that produce products to take responsibility for reducing packaging.

An England Marketing survey for Soil Association Certification in June 2018 found that environmentally-friendly packaging was either 'important' or 'very important' for consumers when they buy fresh produce but that they found it hard (72%) to understand labelling around environmentally-friendly packaging

## What Soil Association Certification is doing

We're committed to supporting licensees to reduce the amount of plastics they use.

Our aim is to:

- Work towards a world that is free from plastic pollution with a rapid phase-out of single use plastics. We want all plastic to be reusable, recyclable or compostable by 2025 – or earlier. And we want to make sure all recyclable packaging is actually recycled.
- Provide information on sourcing environmentally-friendly packaging for food, drink and beauty, including through our network of over 1,000 FSC certified paper and card suppliers.
- We're a signatory to the WRAP UK Plastics Pact, which brings together 68 businesses and charities and the UK government to eliminate problematic single-use packaging by 2025.

**67%**

of shoppers surveyed said they expected organic food and drink to be more environmentally-friendly packaged than non-organic

# Organic across UK

There is widespread support for organic across the UK. Almost a third of organic sales are in London, a significant overtrade versus all food and drink sales there.

The main UK regions have also increased organic sales, with Wales and the west of England making up 7.5% of the total national sales of organic and Scotland almost 7%.

The south of England has the most land devoted to organic. The highest concentration is in the south-west, which accounts for almost half of land farmed organically in England. There are over 1,600 producers and processors of organic in this area.

Welsh licensees have had the biggest rise in organic sales, with a 27% increase. This is mainly due to better sales of Wales-produced red meat such as the Rhug Estate brand and dry goods which account for around 40% of sales of organic from Welsh processors. Wales also has the highest increase of land farmed organically in the UK, at 5.6%.

Northern Ireland-based Soil Association Certification licensees' turnover increased by 22% in 2018. Superfood company Linwoods and White's cereals are two large brands that are driving sales of product from Northern Ireland. Sales of organic mushrooms from Northern Ireland also increased significantly. There are now 220 organic producers and processors in Northern Ireland, an increase of 7.8% on 2016.

At the 2018 Royal Highland Show the Scottish Cabinet Secretary, Fergus Ewing revealed the total spend on

organic grocery in Scotland was up 5.4% (Kantar Worldpanel to March 2018). Sales turnover from Scotland-based Soil Association Certification licensees was more modest at almost 2%.

Organic businesses are benefiting from Scotland being seen as a brand itself, and representing a mark of quality. The country accounts for nearly a quarter (24%) of all organic land in the UK. Organic land is 2.1% of total area farmed in the country. Scotland now has 578 processors and producers, an increase of 3.2% on 2016, suggesting there is an increasing interest in producing organic.

The Scottish market continues to drive innovation in organic. In 2018 we certified two of the first organic tea farms in the UK in Scotland, Windy Hollow Farm in Perthshire and Isle of Arran Tea Company: also Locavore, Scotland's first organic and social enterprise-run supermarket in Glasgow. Innovation in organic is contributing to the growth of agritourism in Scotland – almost half of visitors to the country want to sample local food (VisitScotland).

Sales of organic fresh produce and box schemes in Scotland are booming. They are benefiting from the demand for 'local' and shorter supply chains. Likewise, milk delivery and milk vending machines are offering a new and growing route to market.

## Highlights

- Scottish licensees have increased sales of organic by around 2%, Northern Ireland by 22% and Wales by 27%
- Wales also has highest increase of land farmed organically in the UK, at 5.6% (Defra 2017 statistics)
- Products branded Scottish Organic and agritourism are helping to grow the organic market in Scotland



# Organic farming

More farmers are going into organic farming to meet increasing consumer demand. The amount of organic certified land is increasing, slowly, and organic offers exciting opportunities.

**The amount of organic certified land has increased by 1.9%, the first rise since 2008 (DEFRA).** Land in conversion also increased by nearly 30%, (albeit from a relatively low base) a third consecutive year rise. This is good news and is, largely, because of the increased demand for organic food in the UK, which has given confidence to prospective conversions.

**More businesses are getting involved in organic farming and food manufacture to meet consumer demand.** The number of organic processors increased by 6% and producers by 2% in 2017. DEFRA statistics show that there were 6,586 organic operators in the UK in 2017, up 3.5% since 2016.

**Demand for organic eggs has increased which has led to a rise in the number of organic birds.** It increased by 8.5% between 2016 and 2017, to just over 3 million birds, half a million more birds since 2015.

**Arable producers were receiving 50% to 100% higher premiums for their crops than non-organic farmers in 2017.** Our Organic Arable Report found that, often, organic farms are, on average, more profitable than their

non-organic counterparts. With good prices, innovative supply chains and guaranteed financial support, now is a good time to consider producing organic cereals.

**There are also opportunities for growing more organic arable crops for animal feed in the UK.** In 2015, the UK imported close to 80% of its organic animal feed, and this reliance is increasing year on year. At the same time, processors and retailers are increasingly searching for UK sourced ingredients for organic food.

**There has been a marked increase in the number of producers of organic fresh produce.** More than one in three new applications to become Soil Association Certification certified producers in the 2017-2018 financial year came from people who want to produce organic fruit and vegetables. They are meeting the demand for supermarket sales of fresh produce which have increased over a five year period by approx. £70 million.

**The post-Brexit climate could potentially spur a renaissance in consumers wanting to buy from UK producers.** Opportunity could be greatest for organic producers of

vegetables, who can offer substitutes for the high level of imports.

**Post-Brexit changes to farming policy could present an unprecedented chance for a more ecologically sustainable farming system.** Soil Association has lobbied the UK government to amend the Agriculture Bill to include "establishing and maintaining whole farm argoecological systems". We want a system that is supported by payments to farmers because of the public goods they deliver.

For more information on farmer payments, please visit [www.soilassociation.org/farmers-growers/market-information/financial-information/](http://www.soilassociation.org/farmers-growers/market-information/financial-information/)

**It's important that organic farmers respond to the increase in people adopting meat and dairy-free diets.** These changes to consumer diets are starting to have an impact on what organic farmers grow in the UK. Organic arable farmers are growing 'proteins', like peas and beans, for human consumption, and the agriculture industry, as a whole, is exploring how we can farm more grains like quinoa.

The effects of 2018's wet, cold winter and hot, dry summer will continue to influence organic livestock farming in 2019. The UK had one of the latest turnouts ever in spring 2018, followed by one of the hottest, driest summers on record. This significantly reduced production from grazed grass, forcing livestock farmers to eat into winter forage stocks during the summer. It led to higher production costs for all ruminant livestock farmers. Availability of supplementary feeds appear to be adequate, but producers are hoping for an early spring in 2019 because of reduced forage stocks.

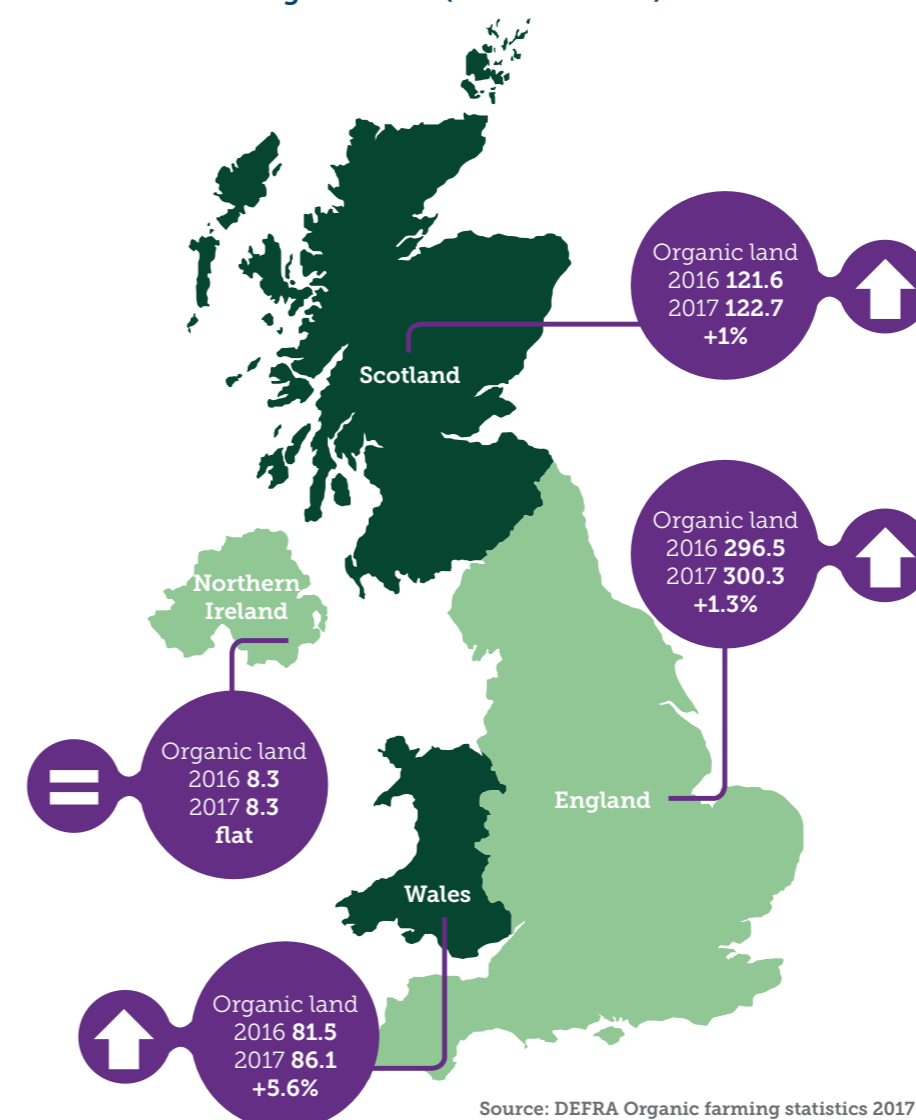
000s hectares	2016	2017	Year-on-year change
Fully organic UK land	482.7	484.8	+0.4%
Land in conversion to organic	25.2	32.6	+29.4%
<b>Total UK organic land</b>	<b>508</b>	<b>517.4</b>	<b>+1.9%</b>

	2016	2017	Year-on-year change
Producers	3398	3465	+2%
Processors	2804	2977	+6.2%
Producer processors	161	144	-10%
<b>Total</b>	<b>6363</b>	<b>6586</b>	<b>+3.5%</b>

Source: DEFRA Organic farming statistics 2017

## Distribution of organic land (hectares 000s)



Source: DEFRA Organic farming statistics 2017

## Highlights

- The amount of organic land in the UK is now slowly increasing, growing by 1.9% in 2017
- With good prices, innovative supply chains and financial support, now is a good time to consider producing organic for the growing sectors
- Post-Brexit changes to farming policy could present an unprecedented chance for a more ecologically sustainable farming system



# Organic across the globe

Global sales of organic were expected to surpass 80 billion euros for the first time in 2017. The UK has 3% of this total (FiBL). It's the seventh largest organic market in the world, a drop from fourth in 2016.

Soil Association Certification licensees export the highest value of organic items to the USA, France and Germany. Unsurprising given that they are the largest and best performing markets. Interest in UK organic and Soil Association certified products, in particular, is very strong in the Far East. There, The Soil Association symbol is recognised by many as the highest level of food assurance.

**As in the UK, health is the major driver of organic food purchases globally.** Concerns about pesticides, genetically modified organisms, and growth hormones are the primary purchasing motives in the USA.

**Organic crops are grown in 178 countries, but only 87 have national standards (Ecovia Intelligence).** With the UK's tough standards, product integrity and quality greatly respected overseas, organic export offers a significant opportunity.

**A 2018 survey of licensees found that nearly half of organic businesses involved in export are exporting ambient grocery products.** 41% of licensees said this channel represented more than a quarter of their business. A quarter of businesses surveyed found that the value of what they export increased by 25% in 2017.

**Latest figures suggest that organic food and drink export continues to be an under-indexed channel.** Licensee figures suggest that approx. 8% of organic food and drink is exported. This compares to approx. 19% of all UK food and drink\*. With the right support, this has the potential to increase as 2018 exports of all food and drink are up 5.1% on 2017, according to the Food and Drink Federation (FDF).

**In Denmark, 13.3% of total food sales are organic (Organic Denmark) – the highest market share in the world.** Indeed, Denmark offers an exciting example of a strong organic market, from which the UK could learn much. More than half of Danes buy organic food every week, according to Organic Denmark. Organic is much more available in supermarkets, making it mainstream, and the difference in price between non-organic products is often lower than equivalents in the UK. Fresh fruit and vegetables account for 33% of total sales of organic in Denmark, and are increasing.

## Trade post-Brexit

**Soil Association Certification is very aware of the uncertainties and concerns surrounding organic trade post-Brexit. We are advising DEFRA on achieving continuity for organic trade between the EU and UK. At the time of writing this report, there was no confirmation of a Brexit deal.**

For more information about the effect of Brexit on organic trade, please visit: <https://www.soilassociation.org/certification/food-drink/brexit-and-organic-certification/>

Soil Association Certification hosts events with experts on everything from regulations to labelling to help licensees export to key organic markets.

\*UK government statistics, 2016 gross value add food and drink (including agriculture contributions) against government FDF value of 2017 food and drink exports.

Denmark has  
**13.3 %**  
of total food sales  
as organic  
(Organic Denmark)

**274 euros**  
per person spent  
on organic  
products in  
Switzerland  
(FiBL-AMI survey 2018)

## Key countries for sales of organic (billion euros)

Position	Country	Sales est	Growth est	% total sales	
1st		43.2B	+6.4%	5.5	↑
2nd		10B	+5.9%	5.2	↑
3rd		8.3B	+17%	3.5	↑
7th		2.6B	+5.3%	1.5	↑

Source: Approx size of market converted from UK £ using £1 = 1.13 euros.  
Figures estimated using data from a number of sources including OTA, Agence Bio, FiBL

## USA – 46% of global sales of organic (FiBL)

The growth of organic sales in the USA has been around 10% for several years, according to Organic Trade Association. This decreased to 6.4% in 2017. The OTA suggests that the biggest organic market in the world has matured so growth has slowed yet remains steady. Their figures show that 83% of families in the USA still buy organic products.

This year, sales of organic dairy products reduced as plant-based alternatives became more popular. Growth in the USA's organic egg market also reduced as other animal welfare claims such as 'pasture raised' created new competition for organic. The biggest organic category continued to be fresh fruit and vegetables. Organic beverages increased in popularity, becoming the third largest organic food category.

## Germany – 11% of global sales of organic

AMI GmbH figures show that sales of organic increased by 5.9% in Germany in 2017. Now, one in 10 Germany-based farms produces organically. Considerable expansion of organic ranges in German supermarkets have contributed to steady growth in the organic market. Supermarkets sales account for almost 60% of all organic sold in Germany. German government figures show that of the 3,500 shops selling solely organic products, 500 are organic supermarkets (Germany Trade & Invest).

## France – 8% of global sales of organic

The organic market in France is growing rapidly, at 17% in 2017, according to Agence Bio. It offers opportunities for UK businesses as 31% of organic products are imported. Around three quarters of French consumers buy at least one organic product a month (Agence Bio). The French market has much more specialist and exclusive organic retailers, including chains such as Biocoop. They contribute over a third of sales (36%) to the total organic market in the country. Supermarkets have a 46% share of the French market, compared to a 65.8% in the UK. The largest growth category for organic in France is wine, cider and beers with more than a 21% increase.

## Highlights

- The Soil Association symbol is recognised by many buyers worldwide as the highest level of food assurance
- A 2018 survey found that a quarter of licensees increased the value of their organic exports by 25% in 2017
- With our higher standards and with product integrity and quality greatly respected overseas, organic export offers a significant opportunity



# The year ahead

Steady growth in the UK organic market is expected to continue. The market size is on target to be worth £2.5 billion by 2020, despite economic uncertainty.

**Decreased consumer confidence in the economy may affect sales of all food and drink – organic included – but it is still at a similar level to early 2018 figures.** December 2018 GfK consumer confidence index figures shows a one-point decrease in consumer confidence. This reflects expectations of potential inflation and uncertainty around EU negotiations. But the figure has not dipped significantly, as it did during the 2008 recession.

**Fast-changing consumer diets will have a massive impact on the organic food and drink market.** Consumers are likely to continue to eat less meat and more free-from and plant-based alternatives. The media focus is likely to continue driving more consumer interest. In this context, certified organic items offer the best quality with top tier assurance.

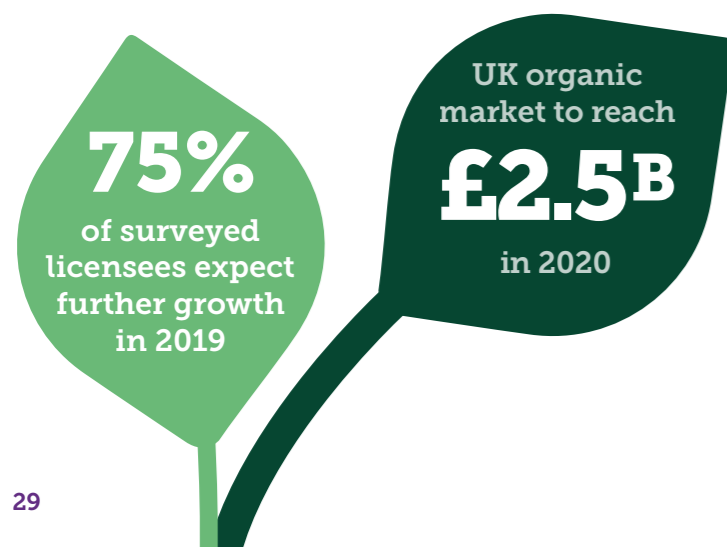
**Channel share of the organic market will continue to change as consumer shopping patterns do.** Online is still expected to have a 25% share of all UK sales of organic by 2023. The discount supermarket share of the market could reach 10% in the next five years.

**Soil Association Certification will continue to provide licensees, and others, with up-to-date guidance on the complexities of leaving the EU.** Brexit uncertainty has meant that many organic businesses have needed to spend time, resource and money planning what to do to counter the lack of a clear way forward. This has included mitigations to anticipate the risks of imports and exports tariffs, customs controls, regulation, currency fluctuations, the impact on consumer confidence and access to labour.

**Clear and consistent messages about what organic is are ever more important in this confusing marketplace, with many on-pack claims and counter claims. We will continue to encourage organic businesses to adopt the strapline 'Food as it should be' to provide a clear message that engages consumers.** We will demonstrate the value and relevancy of organic to consumers through all channels, including a growing media profile and driving a progressive and positive agenda for organic through health, food, agricultural sustainability and environmental UK government policy.

**The Standards Review means that Organic continues to lead the way with the highest standards in animal welfare, international land use, the environment and social impacts.** Soil Association will continue to review and set high standards in these areas and Soil Association Certification will support businesses with the technologies needed to provide both transparency and traceability. As an example, we are working with licensees and others to find technology and tools that help to make complex international supply chains more transparent.

**Businesses can encourage consumers to be part of the organic movement.** Today's conscious consumers want to have a part in determining the future of causes and organisations they care about. They are making choices based on their principles in all aspects of their shopping. Clearly signalling the benefits that organic offers, both from an environmental point of view and through practical solutions such as packaging, helps today's consumer to engage more with organic. Businesses can help them, and others, understand that, in choosing organic, they are doing the right thing, and having an impact on the world around them.



**Simon Crichton**  
Food, Farming and Trade Team Manager,  
Triodos Bank UK

Find out more at: [www.triodos.co.uk](http://www.triodos.co.uk)

**Triodos Bank**

"It goes without saying that Brexit will continue to have a significant influence on every decision made across agriculture and UK government throughout the year ahead. As we edge ever closer to the UK's scheduled leave date, we need to make sure that the move towards sustainability and biodiversity is not drowned out in the ensuing clamour. Or degraded by trade deals that don't value food, agriculture and the environment.

Thankfully, there is a silver lining in the Brexit process. As the Agricultural Bill progresses through parliament, farming and the environment continue to have a high profile in the political landscape. Now is the time to press our MPs and agricultural representatives. We must voice that organic is a serious and viable part of delivering targets for food, the environment and rural economy.

We have a long way to go before sustainability becomes central to government policy, but this year could be a landmark moment in the journey.

Beyond Brexit, there are many opportunities for the organic sector. We can reward farmers for doing public good and managing landscape-scale natural capital, rather than leaving this to wildlife and conservation groups.

I also expect to see more pioneering work across the organic sector in terms of continuous improvement, innovation and diversity – all work that Triodos Bank will be proud to support."



**FOOD  
AS IT  
SHOULD  
BE**



# About Soil Association Certification

We're the UK's largest organic certification body, working both nationally and internationally to offer a range of organic and sustainable certification schemes across food, farming, catering, beauty and wellbeing, textiles and forestry.

The Soil Association Certification team supports 6,000 businesses, 3,500 of which are certified organic, and we license over 70% of organic food on sale in the UK.

We carry out inspections and award organic certification to farms and businesses that meet the standards. The certification schemes we offer, are recognised and trusted by consumers and businesses around the world and our technical and certification support are market leading.

**We work with you to grow the market and by certifying with us, you can benefit from:**

- Help to market your products, with access to campaigns including, Organic September, the Christmas Market and the award-winning Best of Organic Market Awards (BOOM); social media support; free marketing toolkits; invitations to relevant events and networking opportunities
- Market, consumer and industry insight through reports, briefings and industry forums
- Support to export products, selling to new and rapidly growing markets. Licensees get access to our online territory guides and can join us at relevant export briefings or showcases
- Access to packaging experts and innovation through our network of FSC businesses and industry forums
- Access to new routes to market through trade and consumer shows and meet the buyer events. Plus, help selling into foodservice and supply chains through meet the caterer days
- Training for your team at organic learning days and through webinar-based courses
- Technical expertise and customer service from our highly experienced teams.



## Find out more about certification

Contact us to find out more about easy and efficient 'one-stop' certification for many other schemes, not just organic.

If you would like to discuss which type of certification is right for your business, please:

**Call 0300 330 0100**

**Email [goorganic@soilassociation.org](mailto:goorganic@soilassociation.org)**

**Visit [soilassociation.org/certification](https://soilassociation.org/certification)**

## About this report

This report is compiled using data from a number of sources, including Nielsen Scantrack, licensees, caterer and retailer surveys and contributions from key partners within the industry. We are grateful to all those who have contributed in any way, and particularly to Triodos Bank, which have supported the report.

The report is available free to licensees at: [soilassociation.org/downloadmr](https://soilassociation.org/downloadmr)  
For non-Soil Association Certification licensees, the report costs £100+VAT.

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