



The 2017 Organic Market Report

Organic
Market
2017



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TESCO

daylesford



Rachel's organic

GREEN & BLACK'S

viridian





UK ORGANIC MARKET OVERVIEW



Total organic sales 2016
£2.09B

+7.1%
Sales growth

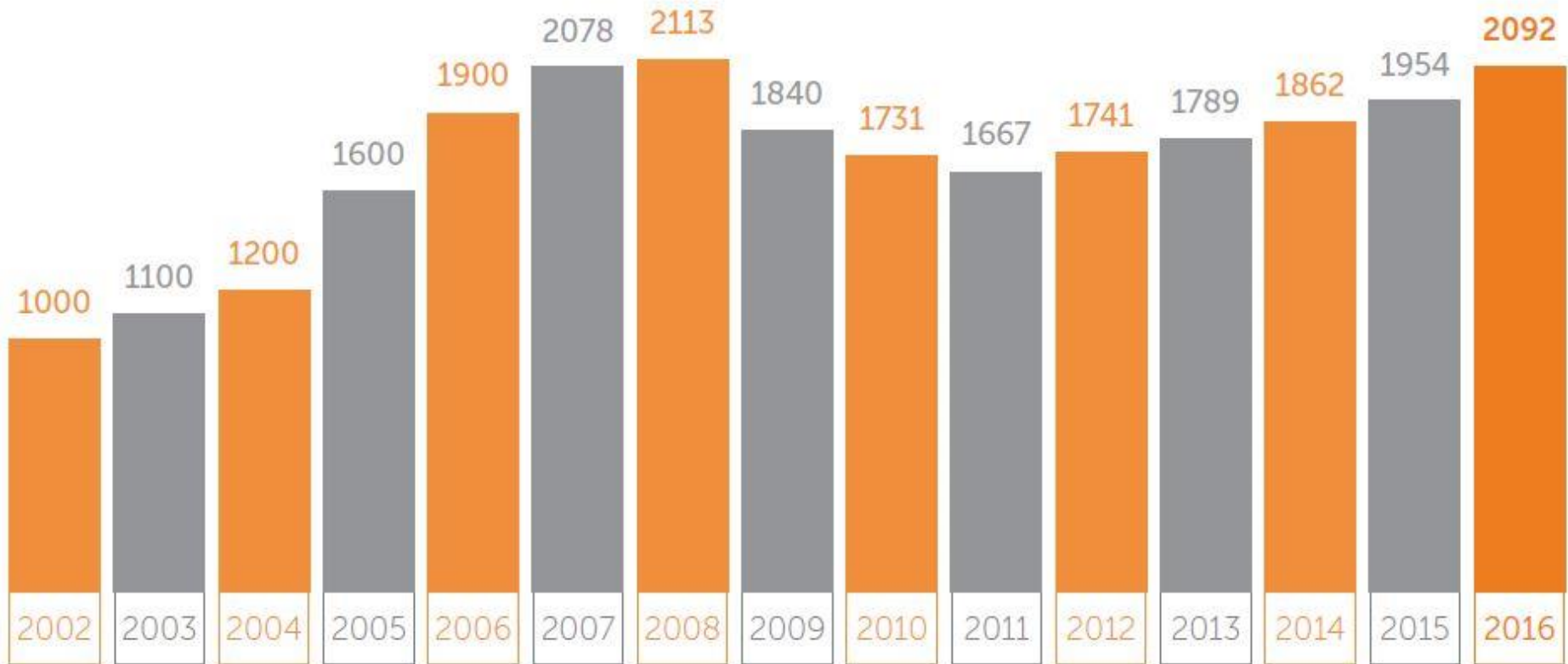


UK SALES OF ORGANIC PRODUCTS



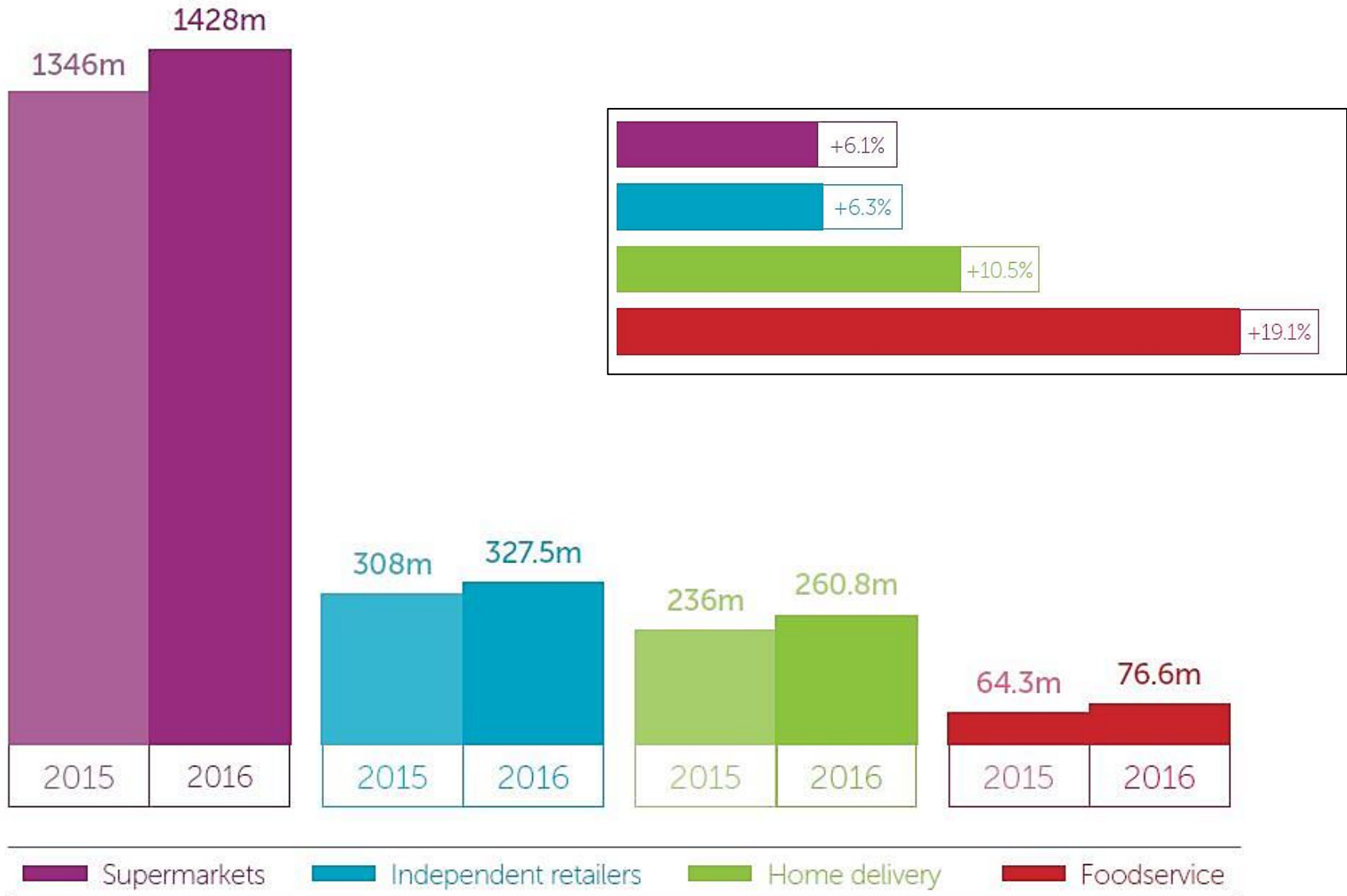
2002 – 2016

UK Sales of organic products in GBP (£) millions



CHANNEL GROWTH

2015 – 2016 Channel growth in GBP (£) millions and percentage growth



SUPERMARKETS

£1.42 billion total sales; growth +6.1%

New listings in supermarkets

Organic grocery growing the fastest

Discounters expanding ranges



HOME DELIVERY

£260.8m total sales; growth of +10.5%

Recipe boxes creating new interest

Shoppers want convenience

Amazon Fresh – shop window



INDEPENDENTS

£327.5m total sales; growth +6.3%

Wholesalers +5%

90% expect sales to continue to increase this year



CATERING

- **Growth of 19.1%**
- More High Street and visitor attraction menus include Organic
- Food for Life Served Here now generates £15 million spend on Organic, +66% on last year
- Foodservice wholesalers seeing the opportunity
- Increased interest in healthy work place catering



THE ORGANIC CONSUMER

Product	% Share*	% Change*
Dairy	29	+2.2
Fresh produce	23.5	+10.3
Baby food	10.3	+5.3
Meat, fish & poultry	10.1	-1
Confectionery/soft drinks	3.9	+5
Canned & packaged	15.8	+12.7
Beers/wines/spirits	2.2	+14.3
Bakery & cakes	14	-5.2
Chilled foods & deli	2.9	+16
Frozen	0.7	-6.9



THE ORGANIC CONSUMER

MISTRUST



FARMER EMPATHY

"The impression I get that is most farmers and producers are getting screwed over"
Simone, 35-44, London



WASTE

"I'm not sure what the truth is...there are all sorts of claims."



"Our blue bin is always full. It's criminal!"
Janet, 35-44 Manchester

"The impression I get is that most farmers and producers are getting screwed over"

CONVENIENCE

"I feel quite guilty but I have to, say, just pop into Tesco's. You have the local butcher which is better quality but you may not have the time"
Simone, 35-44, London



INFORMED



HEALTH



"There's so much about our food on TV"
Hayley, Principled Striver, Glasgow

"We all want to eat more healthily and are more conscious of it but price is a big issue"



Principled Strivers

Doing the right thing but time pressured

Lead busy lives. Are, or feel, time pressured. Have principles but don't have time to shop around and occasionally will buy what is convenient or what they fancy. Moderately organic engaged, low price sensitivity.



Food Adventurers

Food is central to their identity

Curious and like to discover new ingredients, cuisines, restaurants. Sceptical of trends, well informed. High organic engagement, low price sensitivity.



Caring Parents

Role modelling and sacrificing for their children

Life is a balance: budgets, wellbeing vs. treats, time for work, time for play. Juggling. Will make personal sacrifices for their children. Engaged with organic, high price sensitivity.



Making a statement

Highly social; the most outer-directed. Want to look and feel good. Engaged with organic but not a philosophical level. Price conscious but will make sacrifices in one area to allow them to have something else.



Getting everything under control

Orientated towards living a healthy life. Strongly held views on food, production, retail. Self-focused, engaged with food, organic as one of a number of interesting options. Price conscious but least price sensitive.



See the bigger picture

Want to do the right thing for the planet and their communities as much as themselves. Emotionally engaged in product choices. Very high organic engagement also very price sensitive (their value equation is not focused on price though)



THE YEAR AHEAD



- Organic meeting consumer need, and becoming even more relevant
- Consumer confidence
- Foodservice opportunities; overall market predicted to grow at consistent 2.9%
- Uncertainty post EU referendum
 - Organic regulation
 - Farmer payments
 - Future trade deals
- Rising prices and inflation

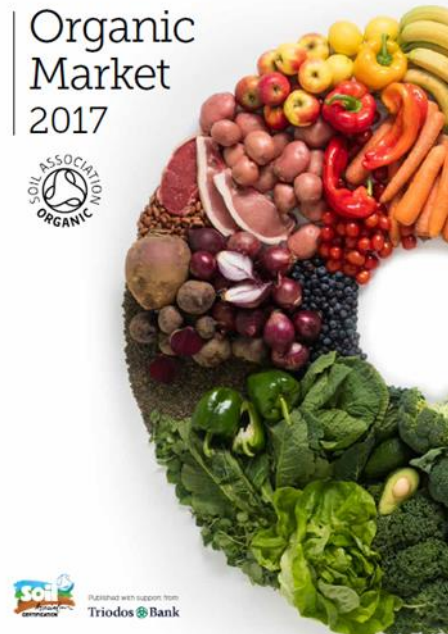




Thank you

Soil Association
@soilassociation #OrganicMarket

soilassociation.org/organicmarketreport2017



LEATHER JACKET CONTROL FIELD LAB

David Michie

Head of Agricultural Development
Soil Association Scotland



Biology



Crane-fly larvae

Adults emerge late
summer / autumn

Lay eggs shortly
afterward **in grass**

Larvae hatch in
about a fortnight

Most vulnerable stage immediately after hatching

Life cycle

Vulnerable period
– optimum time
for control

Larva (1st -
2nd instar)

Late autumn

Larva (3rd
instar)

Over winter

Adults
emerge & fly
- Egg laying

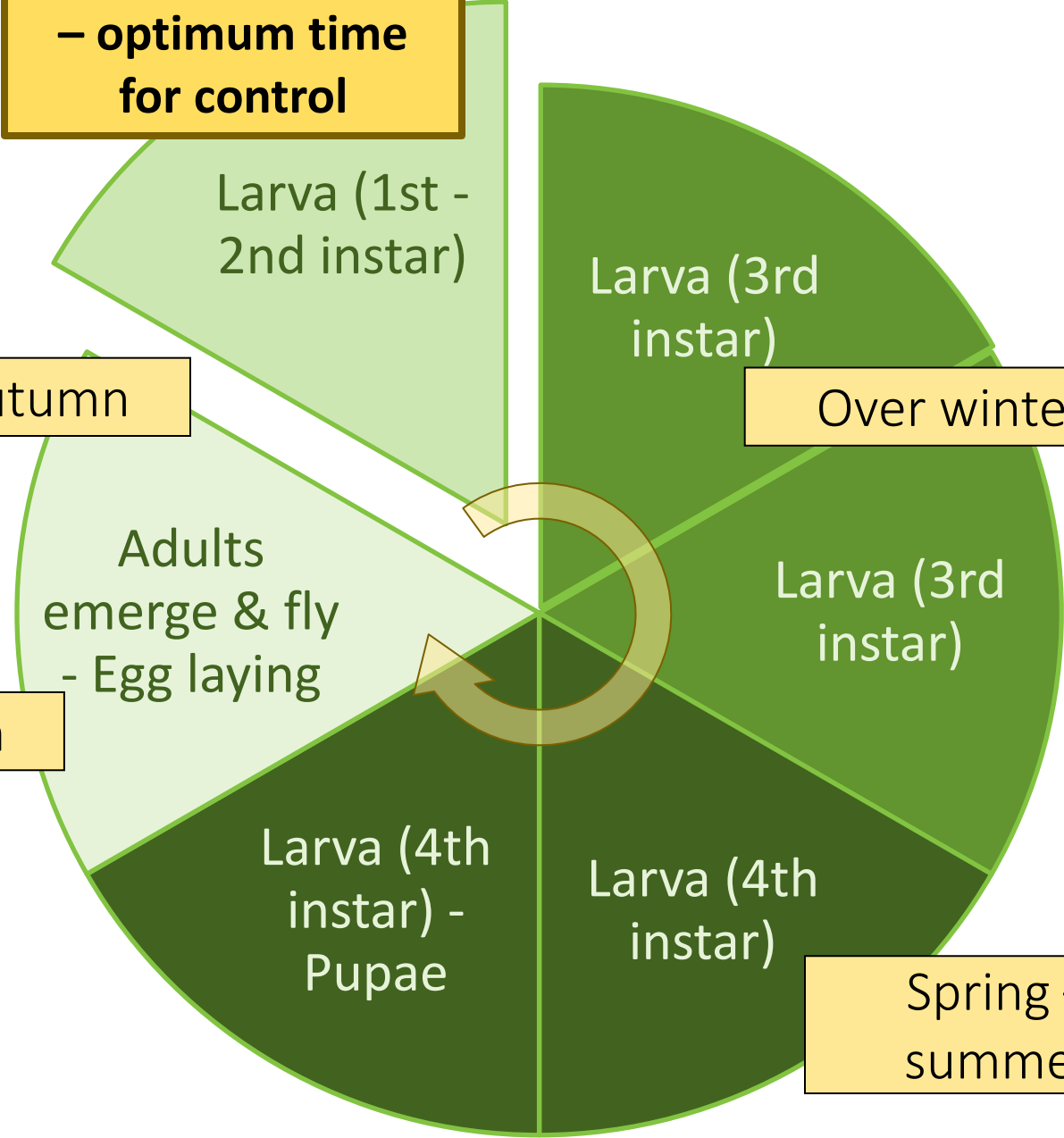
Autumn

Larva (3rd
instar)

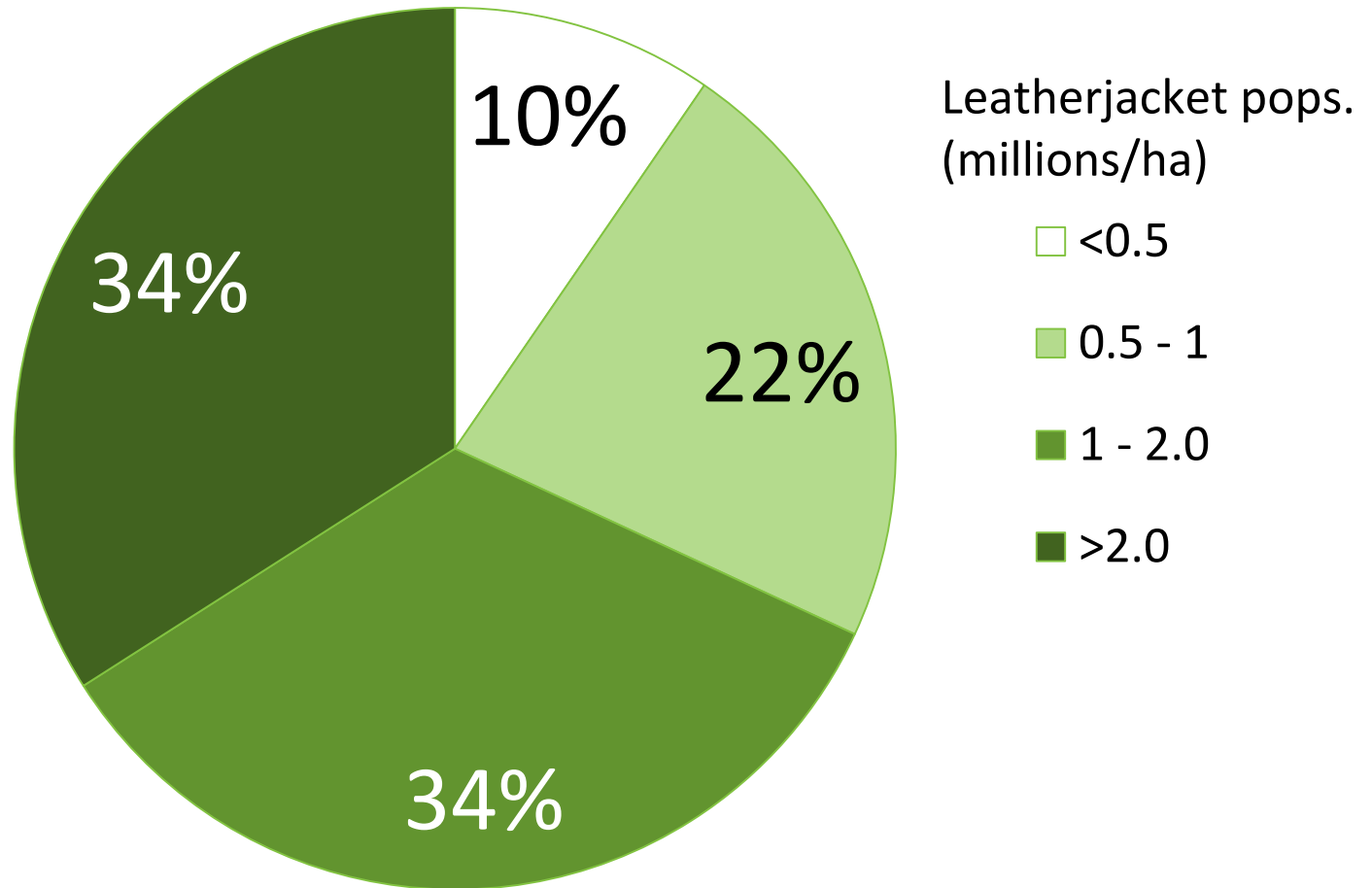
Larva (4th
instar) -
Pupae

Larva (4th
instar)

Spring –
summer



Field data: winter 2017



Data taken from 94 field samples in Ayrshire and Bute in early 2017



B7004

A746

Glasserton

A747

Low Mains Farm

B7004

B7004

B7004

B7003

Kidsdale

B7004

B7063

Isle of Whithorn

Isle Head



A

B

Sampling

25 soil cores

Each core is:

- 2.5" (6.5 cm) wide
- 2.5" (6.5 cm) deep

Cores taken along the longest diagonal of the field





Field lab treatment

- Garlic (Rigel G)
- Sprayed end November 2016
- Recommended rate 1-2 l/ha



Rigel G		
	1.5	l/ha
£	80	/l bottle
£	119	/ha

- Currently sold in 1 l bottles for higher value crop use

ORIONET
GENUINE TECHNOLOGY

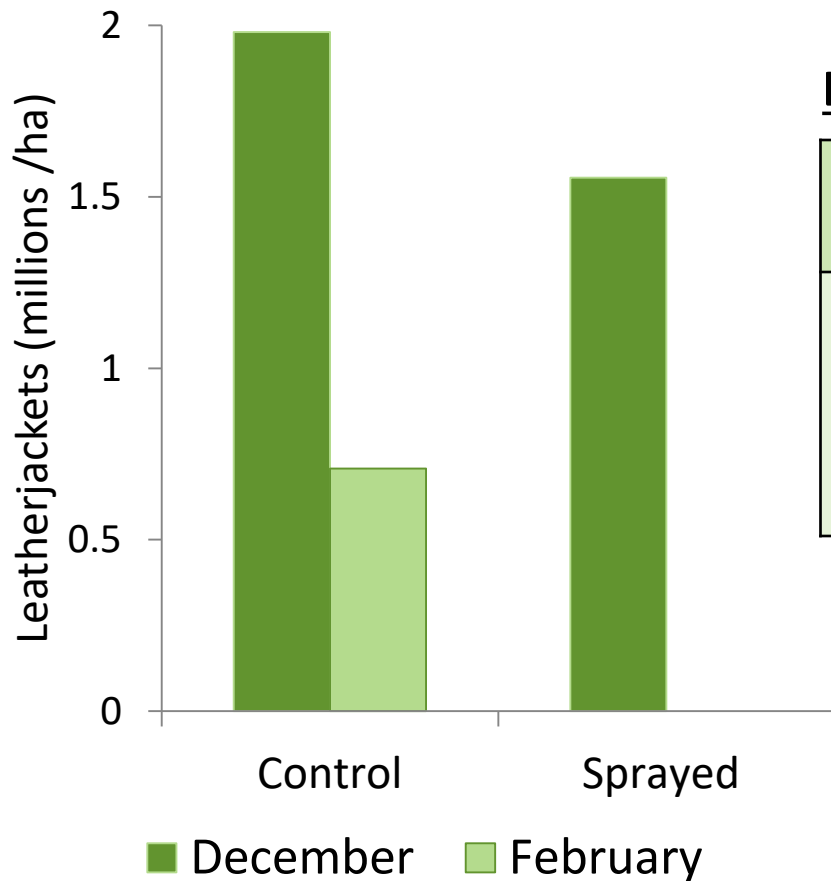
RIGEL-G

A high quality organic feed with an added garlic extract. Contains a silicon wetter for improved coverage.

Directions for use of Rigel-G

Crops	Timing	Rate (l/ha)	Maximum number of applications
Field Crops	As part of regular programme. Every 7-14 days	1-2	2-4
Fruit Crops	As part of regular programme. Every 7-14 days	1-2	2-6
Ornamental/Sports and Turf	As part of regular programme. Every 7-14 days	1-2	3-6

Results



Leatherjacket pop. estimates (millions /ha)

	December	February
Control	1.98	0.71*
Sprayed	1.56	0.00**

***5 leatherjackets were found in 25 cores**

****indicates 0-141,482 leatherjackets /ha**

What's next?

- Were the results genuine, or were they due to sampling error? *Probably not.*
- Did the climate in the milder wetter south west make a difference?
- Did we get lucky with the timing?
- Will spray applications in spring work?
- Should we replicate the trial in drier colder conditions (i.e. north east Scotland)?

The logo features the word "Soil" in large, white, sans-serif letters, with a blue brushstroke above and a green brushstroke below. To the right is a blue circular emblem with a white swirl. Below "Soil" is a brown brushstroke. The word "Association" is written in a black cursive script, and "SCOTLAND" is in bold, black, sans-serif capital letters below it.

Soil

Association
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