
SOIL ASSOCIATION ORGANIC

# Organic Market Report

## 2025

Soil Association CERTIFICATION

# Contents



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COSMOS
ORGANIC

# Foreword


"This is surely our time."

Economic storms have created a tough climate for organic in recent years, but this year's report shows a striking bounce-back.

This is in no small part thanks to our most committed customers: people from regular households across the country prioritising healthy, organic quality and trusted ingredients to feed themselves and their families.

Rising demand indicates support for organic as a solution to meeting the challenge of growing nutritious food in a changing climate – particularly as we look back on the wettest and warmest year on record.

In response to the climate crisis, retailers are changing their approach to supply chains – and there are numerous opportunities for organic. It's clear our movement is hitting the sweet spot as a credible, meaningful standard that supports wider consumer claims, particularly in light of the latest Advertising Standards Authority guidance on regenerative agriculture.

## Going for growth

As a regulated global standard, we've seen how the long shadow of Brexit continues to impact international trade. I'm pleased that our lobbying around the practical realities of implementation were heard. Yet, with a third move to kick the can down the road on some key decisions, I'm impatient for a long-term solution that gives the sector some much-needed certainty for the future. Ultimately, we need a level playing field for organic imports and exports.

This last year has seen significant political change with the Scottish Organic Action Plan finalised for launch in 2025. But it's clear we can't wait on political support in England and Wales to move forwards.

In this intervening time our sector has truly rallied together, with industry collaboration on dairy, arable and horticulture, drilling into the nuts and bolts of what it will take for organic markets to scale.

This capacity for cross-sector collaboration sets organic apart, building knowledge and focus to unlock our potential. I look forward to seeing these plans delivered in 2025.

## Ambitious goals

At a wider level, the Net Zero Transition Plan for the UK Food System, from WRAP and IGD, is a marker of the collaboration, scale and pace of change needed across industry. It will undoubtably catch the attention of policy makers. The Soil Association continues to champion organic in these forums, with pragmatic and evidenced solutions as the wider food industry begins to systematically scrutinise its impact.

More voices are now calling for a DEFRA Organic Action Plan to ensure 10% of land is farmed organically. These voices include 13 NGOs including the Soil Association, Greenpeace, RSPB and The Wildlife Trusts. It's a key milestone in rallying the wider environmental community around the solutions organic represents and the changes we want to see.

This momentum is strengthened by the legal challenges now emerging on nature decline, coupled with the UK Climate Change Committee calling for clear action on agriculture.

With changing corporate reporting regulations driving ever-greater shareholder scrutiny, this is surely our time. We know organic is part of the solution – and now's the moment to see its impact unleashed.

**Dominic Robinson**
**Chief Executive Officer of Soil Association Certification**

# Executive summary

Organic has bounced back from the cost-of-living crisis with growth exceeding non-organic, rising 7.3% to reach £3.7bn.

In 2024, the total UK organic food and drink market experienced its thirteenth consecutive growth year. In fact, it outperformed conventional food and drink with rises in both value and unit sales. Sales increased across every key channel, with independent retail, non-food and hospitality enjoying particularly strong years.

- **Value sales in major retail grew 8%***, driven by uplifts in ambient grocery, fresh produce, and meat, fish and poultry.
- **Organic unit sales grew four-times more than non-organic** at 4.7%*, compared to 1.2% for non-organic.
- Organic is **twice as likely to be shopped online**. Twenty-three per cent** of supermarket organic purchases are made online, compared to 13% of non-organic.
- Almost **seven in ten consumers intentionally shop organic*****.
- **Sales through independent retail rose 9%** – with retailers confirming the biggest reason was organic addressing consumer concerns around health and sustainability.
- **Home delivery is an important channel** for organic sales, accounting for 15% of the market and **rising 3%**.
- **Hospitality returned to growth**, soaring 6.5% as food inflation fell from a record high. Making up just 5.6% of the total organic market, there is significant opportunity for growth.
- The non-food sector enjoyed a strong year with **organic beauty and textiles both growing 11%** as consumers recognise the value of certification to navigate greenwashing.
- The future looks bright – with 70% of Organic Market Report **survey respondents predicting sales increases for 2025**.
- While demand for organic grows, **the share of UK farmland has remained static at 3%**.

## Driven by quality, health and sustainability

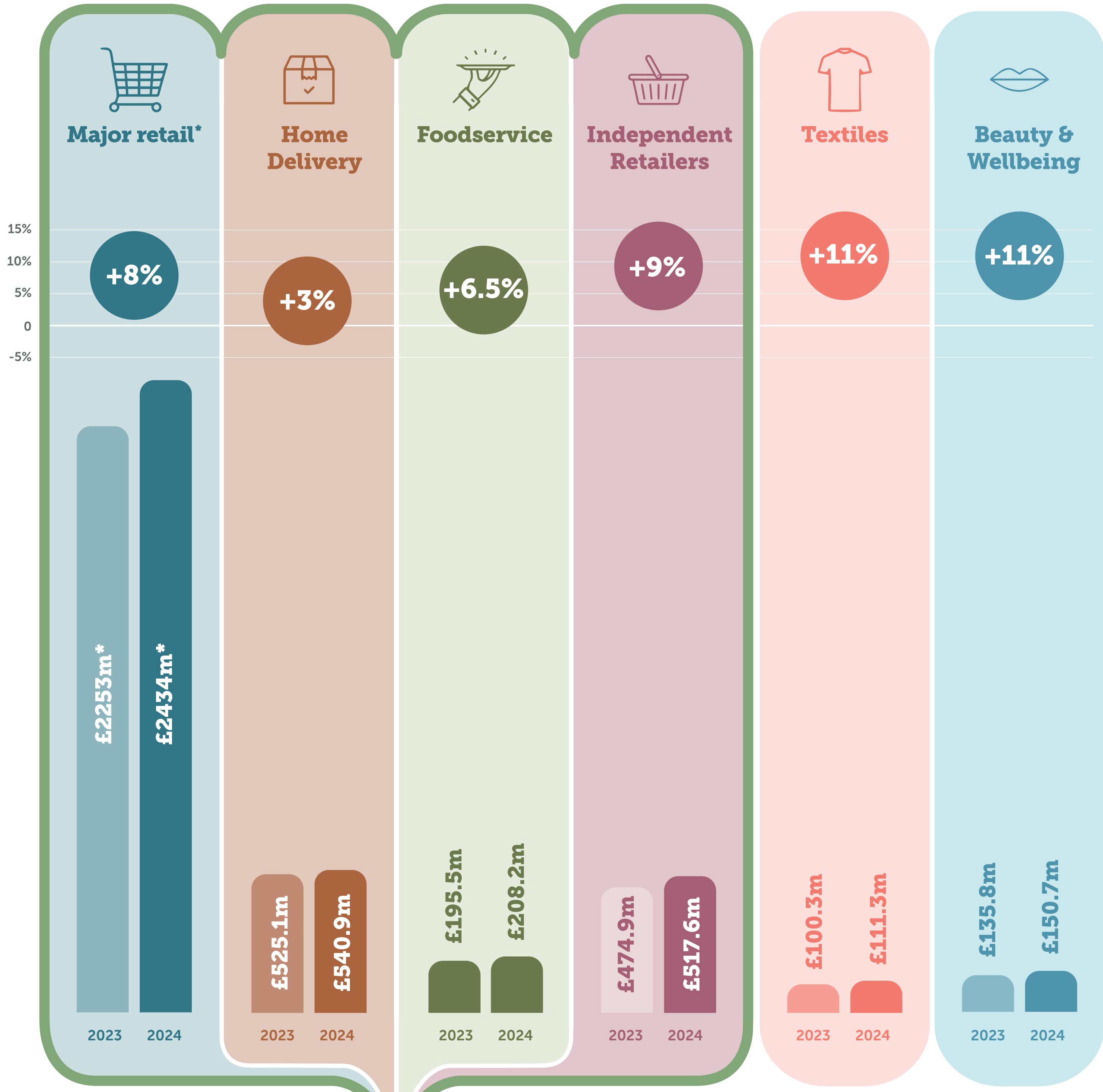
Organic sales are fuelled by rising customer demand for sustainable, high-quality products free from artificial pesticides. Lower and middle-income households are the most active organic shoppers. While we expect organic growth to continue into 2025, more government support and retailer engagement is needed to unlock the category's full potential and increase organic farmland across the UK.

* NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company

** NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Soil Association Certification defined, 52 week period ending 28 December 2024

*** Organic Research Centre and UK Organic 2024 Report

# Sales of organic in 2024 in GBP(£) millions and percentage growth





* NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company

All other figures based on Soil Association Certification data

# Market overview

## Organic Market Report survey highlights*

**50%** of respondents enjoyed a positive year for both volume and value sales

**20%** saw significant sales increases

**70%** predict further sales increases in 2025

The UK organic market has entered its thirteenth consecutive year of growth. It's now worth £3.7 billion with sales increasing across all key channels and product categories.

This surge has been driven by a strong year for major retail, with organic value and volume growth significantly outperforming non-organic.

Sales of organic in major retail are worth £2.43 billion.** Unit sales of organic grew four-times more than total food and drink at 4.7%, while organic's value sales grew 8%.**

In previous years economic challenges reduced volume in categories like organic dairy. So it's great to see a return to unit growth in 2024 – a powerful indicator of a strong year.

This positive trend was echoed in the Organic Market Report survey. Over half (50%) of respondents reported a positive year for both volume and value sales, with a fifth (20%) enjoying a significant sales increase.

Online continues to be a strong performer, with organic twice as likely to be shopped digitally through the grocery multiples.

Other channels saw powerful performance too. The independent retail channel rose 9% to top £518 million – fuelled by customers seeking a unique in-store experience, quality products and access to more local food.

Home delivery, which has always been an important channel for organic sales – making up 15% of the market – is now back in growth, seeing a 3% uplift. And after a difficult couple of years, foodservice saw a 6.5% sales increase, largely thanks to a fall in inflation.

It was a strong year for the non-food sector too, with organic beauty and textiles both up 11%.

### Thriving, not just surviving

Thanks to a new report from the Organic Research Centre and UK Organic (with support from If You Care and Sustain) businesses have fresh insights on how consumers are shopping organic. The report shows that seven out of ten consumers "intentionally" buy organic, with younger lower and middle-income households the most active organic shoppers.

### At a glance

Unit sales of organic grew four-times more than non-organic.

The organic food and drink market grew for its 13th consecutive year.

Growth of organic farmland isn't keeping pace with organic market growth.

### The top three challenges for the organic sector are:*

- Consumers buying less due to cost of living
- Availability in retailers
- Inconsistent government support for organic

* Soil Association Certification 2024 survey of over 200 organic businesses.

Cost-of-living pressures haven't gone anywhere. But, now accustomed to higher prices, consumers are prioritising other areas, such as health and the environment. These priorities are here to stay.

So, is 2025 the year organic doesn't just survive but thrives? In our Organic Market Survey, 70% of respondents predicted a sales increase for the year ahead (up from 60% in 2023).

But there will still be pressures on the sector. It's not known what impact national insurance rises will have on the industry. Some commentators expect that they may trickle down to fuel food inflation.

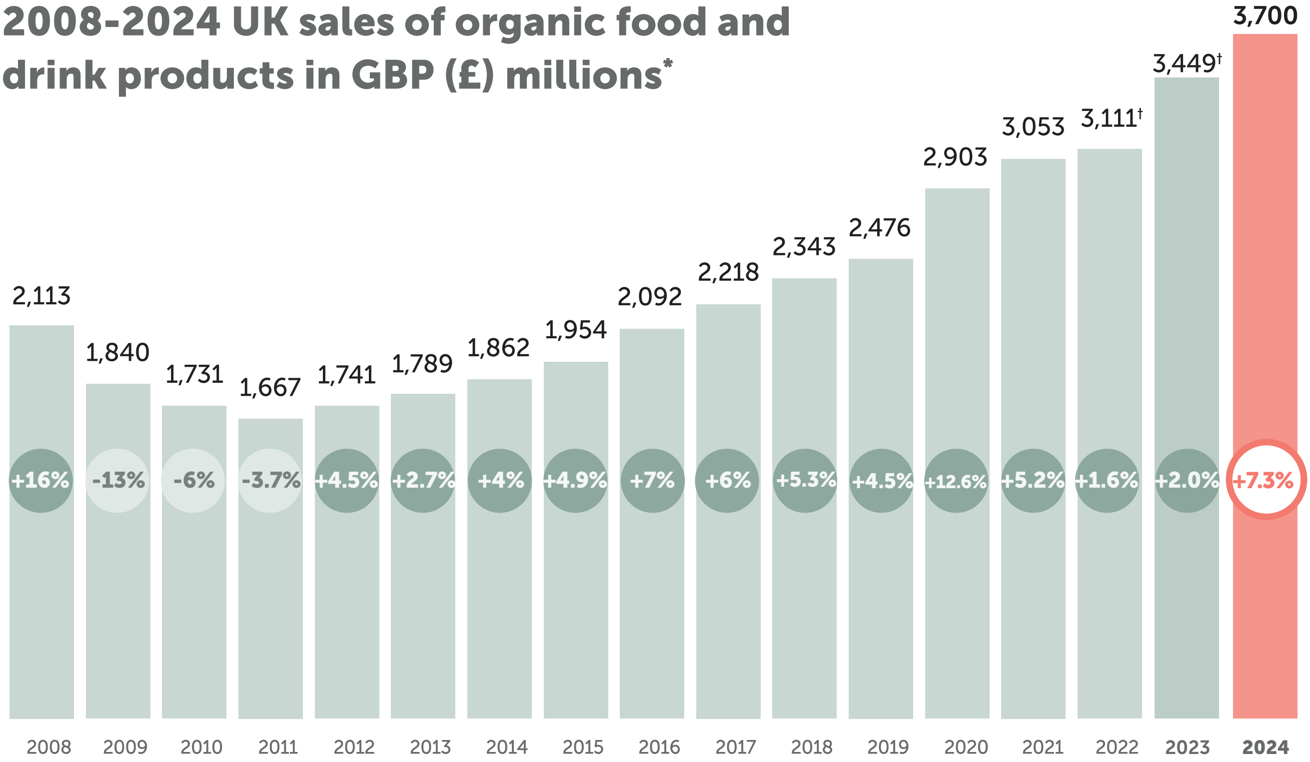
Plus, despite another year of growth, there's still a widening gap between the organic market and organic production in England, with a heavy reliance on imports. Organic farmland has remained static for another year. And the percentage of organic land share has largely halted in England, representing just 3% of the country's farmed area.

Consumers know organic is the right choice for health, producers and the planet. But we need bold national Organic Action Plans to catch up with the progress other countries are making around the world.

The time to act is now. Because with the right government support, and more retailer engagement, the organic market's true growth potential could be unlocked and make the UK a real leader on the world stage.

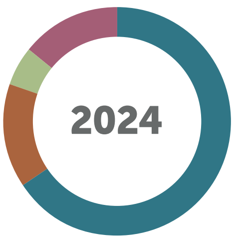
** NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company

## 2008-2024 UK sales of organic food and drink products in GBP (£) millions*

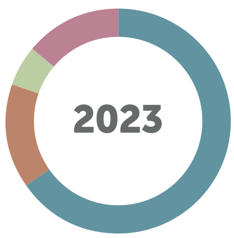



* Based on Soil Association Certification Organic Market Reports
† This figure has been adjusted to reflect changes to the dynamic input provided by data sources

## Share of organic sales by channel 2023-2024




Supermarkets **65.8%**†
Home delivery **14.6%**††
Foodservice **5.6%**††
Independent retailers **14.0%**††




Supermarkets **65.3%**†
Home delivery **15.2%**††
Foodservice **5.7%**††
Independent retailers **13.8%**††

† NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024 and 30 December 2023 respectively
†† Based on Soil Association Certification data

# Organic consumers

## More shoppers are turning to organic for healthy, safe and high-quality products, with Gen Z leading the way.

IGD's Shopper Confidence Index shows consumers in general are still in a subdued mood. Thirty-one per cent expect to be financially worse off in the year ahead compared to 27% in July 2024.

However, despite people still feeling the pinch across the board, organic is growing with 67% (almost seven in ten) intentionally shopping the category [ORC and UK Organic report]. And it's continuing to win market share with a new generation.

According to Soil Association Certification research, nearly half of UK 25-34-year-olds feel happier buying organic food because they believe they're positively impacting the environment.

What's more, over 20% consider factors like health benefits, sustainability and reduced packaging as essential, rather than optional extras or 'nice-to-haves'. That's compared to just 9% of over-65s.

But it's the youngest consumers who are leading the way. Research from Abel&Cole reports 42% of 18-24-year-olds buy organic at least once a month. That makes them 92% more likely to buy organic fruit and veg than millennials.

TikTok influencers are setting the pace online. For example, Donna Bartoli showcases organic by sharing easy and healthy supermarket swaps, while Anna Wilson films her organic food hauls celebrating the best of the category. Influencers like these now play a huge part in educating the consumers of tomorrow about organic.

### Combating greenwash

Shoppers now expect the brands they support to be honest about sustainability. Soil Association Certification was  consulted by the Advertising Standards Authority to help produce guidance on claims in ads around regenerative agriculture to ensure they don't mislead or overclaim.

The guidance confirms that advertisers should "avoid conflating" regenerative farming approaches with organic, as organic is a legally regulated standard while there is as yet no widely agreed definition or legal recognition for regenerative farming.

Organic remains the trusted benchmark for shoppers seeking to support verified, independently inspected regenerative farm practices.

### Gut health wins out

Health is one of the top three reasons shoppers choose organic. And after Tim Spector helped raise awareness of gut health in 2023, it's been a driver for the organic category, finding traction with a younger audience through on-trend products like kefir, tempeh and kombucha. This trend also highlights public concerns around ultra-processed food.

One of the reasons organic food may be positively linked with gut health is the lack of synthetic pesticides used in organic farming. Some studies have shown they can disrupt the gut microbiome.

### Lower income shoppers choose organic

According to ORC and UK Organic research, income isn't necessarily a barrier to supporting organic. In fact, lower-income shoppers displayed higher rates of purchasing organic products consistently in multiple product categories. Also, they're more likely to buy organic products on special occasions.

The research found the lower income subgroup had a higher proportion of shoppers who said that they "always bought as organic" in at least four (or more) product categories.

Plus, data from veg box specialists Locavore shows that 28% of its shoppers have an annual household income of under £30,000 (and half of those were under £20,000).

Overall, as economic confidence slowly returns, the future looks bright for organic. With the category meeting consumers' evolving needs, and winning share with younger buyers, it stands to gain further ground as sustainability becomes ever-more embedded in shoppers' buying habits.

### At a glance

**7/10** intentionally shopping organic

[ORC and UK Organic report]

## Top three reasons for choosing organic

1. No artificial pesticides
2. Higher standards – including animal welfare
3. Personal health

Source: ORC and UK Organic report

## Shoppers' key concerns

Households are having to balance the **higher cost of living** alongside **health and wellness** as their top concerns.

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While cost remains a concern, 70% of shoppers would buy a brand that has health benefits for themselves and the planet.

Source: NIQ Homescan Survey SOTN Nov 2024

# Major retail

Organic major retail sales grew by 8% driven by growth in ambient grocery, fresh produce and meat, fish and poultry. The channel is now worth £2.43 billion†.

As predicted last year, organic volume and value sales are both now in growth.

Over the last few years economic challenges have reduced volume in certain categories like organic dairy, while inflation raised prices. But 2024 saw a return to growth in unit sales and continued growth in value.

Unit sales of organic grew four-times more than total food and drink at 4.7%, while organic's value sales grew 8%.*

Today most (59%) supermarket shoppers buy organic.** Demand for organic shapes, and is shaped by, availability in supermarkets.

In 2024 Sainsbury's, Waitrose and Ocado all continued to overtrade in organic. Ocado in particular massively over-trades in key organic categories like milk and beef. Tesco, the UK's largest retailer, achieved a 1.6% uplift in its organic share of trade, and Lidl 0.5%.

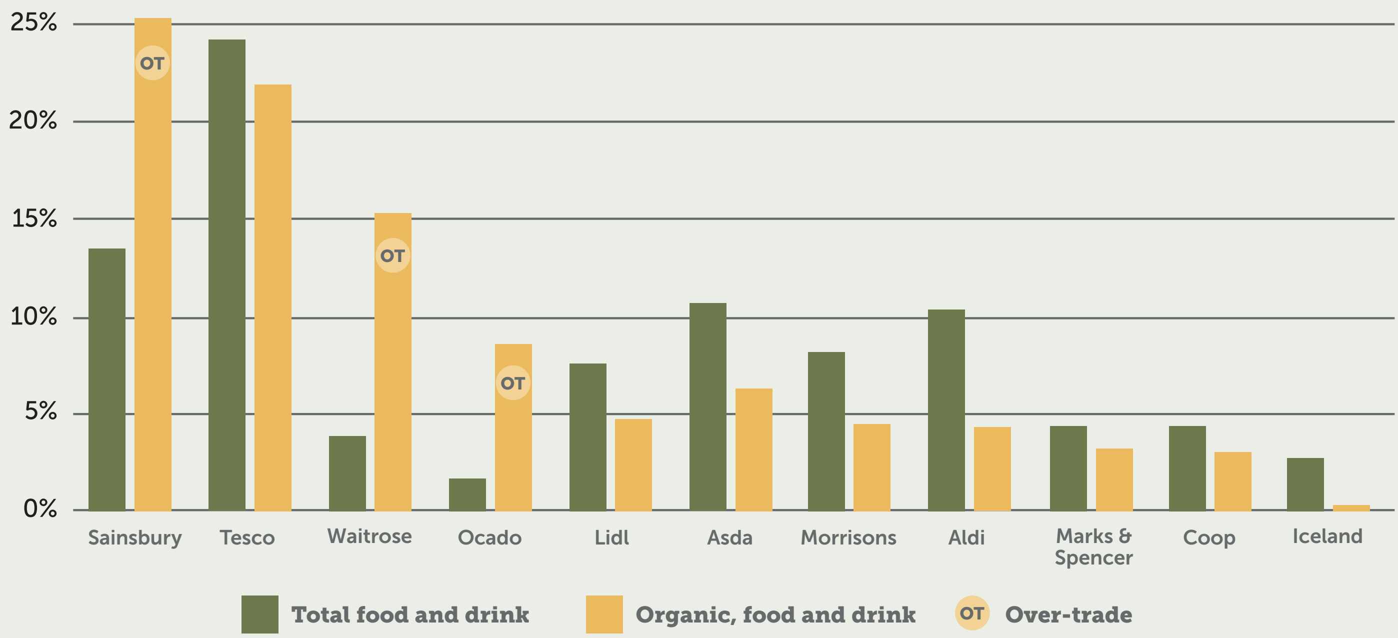
Yet it isn't just the retailers most associated with organic making progress. Morrisons is engaging more with organic while, despite the cost-of-living crisis, Lidl and Aldi have maintained their headline organic fruit and vegetable ranges, showing their commitment to the category through everyday buys. Plus, the big discounters have also invested in hero products like organic prosecco.

Meanwhile, retailers are more aggressively using loyalty schemes, like Tesco's Clubcard, to lock-in shoppers with everyday cheaper prices and deals in return for their data. This has included a focus on organic produce and dairy offers – two common entry points into the category.

## Rise of the omni-channel shopper

Right now, half of all supermarket buys are made by households that shop both online and in-store (called 'omni-channel shoppers') [NIQ]. Organic overtrades hugely online – with 23% of all organic food sold through the channel – making this a huge opportunity.*** According to the Organic Research Centre, half of organic shoppers are omni-channel, shopping in-store and online (almost double the amount versus non-organic).

## Grocery share of trade for total food and drink versus organic




Source: NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Soil Association Certification defined, 52 week period ending 28 December 2024

† Figures for this channel have been adjusted in 2024 to reflect changes to the dynamic input provided by NIQ data sources. NIQ Scantrack coverage has expanded to include the discounters Aldi and Lidl, Amazon, Poundland and Farmfoods.

Soil Association Certification is working with retailers to help them take advantage of this trend. This includes creating digital storefronts that showcase the breadth of the category and engage consumers around its benefits.

## Organic gains with Amazon

The biggest online player is Amazon – and a massive 8-9% of the top 100 grocery sellers' items on the digital giant are certified organic (according to Soil Association Certification research). That's a bigger share than any of the major high street stores.

The Amazon Climate Pledge Friendly programme continues to be a barometer for the category. Soil Association Certification is the only UK organic certifier that qualifies for the pledge. Shoppers can compare different certification schemes through Amazon, which now highlights "sustainability features" like biodiversity, organic ingredients and animal welfare. This shows shoppers will actively engage with this important information when given the opportunity. Amazon's 2024 research shows that products badged with the Climate Pledge Friendly label saw an average sales increase of 15.5% – and was particularly impactful for smaller brands and less-visited products.

## Toasting strong sales at Majestic

Majestic has seen soaring sales of organic wine – almost doubling over the past year as demand and availability increased. Sales saw a 94% uplift in the 12 months to the end of July 2024, compared to the previous year.

This shows that organic is increasingly recognised as a way for wine producers to future-proof supply in the face of the climate and biodiversity crises.

## At a glance

**8%** major retail channel growth in 2024

Organic is **twice** as likely to be shopped online within major retail

**59%** of supermarket shoppers buy organic

## The true price of organic

The cost-of-living crisis has sharpened supermarkets' price strategies – but what does this mean for organic?

To find out, Soil Association Certification compared the price premiums of ten organic products at both farmgate and RRP through three major supermarkets.

While organic products had a modest average farmgate premium of 27%, this increased to a 70% average premium at RRP. One of the reasons for this is retailer price-matching on non-organic goods disproportionately lowers their price and exaggerates the price difference between organic and non-organic products. Effective retail pricing strategies on both organic and conventional are key to unlock further growth in organic sales.

* NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024

** NielsenIQ Homescan Food & Drink 52 week period 10 August 2024 ~last 12 weeks, shared at the Soil Association Certification Organic Trade Conference in November 2024

*** NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Soil Association Certification defined, 52 week period ending 28 December 2024


## Organic innovation

Online retailer Ocado is embracing the category by helping nurture the next generation of organic products. Its Ocado Roots programme will develop young brands, giving them guidance and a route to market. As a headline sponsor at the BOOM awards it's offering entrepreneurs a "Dragons' Den" style pitch session. Plus, it's also supporting farmers by funding on-farm education and organic knowledge exchange.

In the wider market, organic challenger brands are also making waves in the aisles. Innovative bean company Bold Bean's value has risen 353% while award-winning bone broth brand Borough Broth is up 191%.**** This shows how entrepreneurs are choosing organic to give their products maximum shelf stand-out and signal quality, health and environmental credentials.

**** The Grocer/NielsenIQ

# Category performance

## How the UK's organic food and drink market surged in 2023-24.

In 2024 there was strong value and unit growth across all key organic categories, with the majority outperforming non-organic.

Produce, ambient grocery, dairy and meat, fish and poultry saw the largest sales uplifts. Produce enjoyed double digit growth across salad, bananas and carrots – while yoghurt and butter sales boosted dairy.

Dairy and produce categories have the highest share of organic sales – accounting for almost half (49%) of all organic sales made through major retail. These fresh categories are key entry points for organic shoppers seeking natural, minimally processed and healthy options.

Ambient grocery products such as oils, vinegars, tea and coffee also have a sizeable share of organic sales, accounting for 15% of all major retail organic sales.

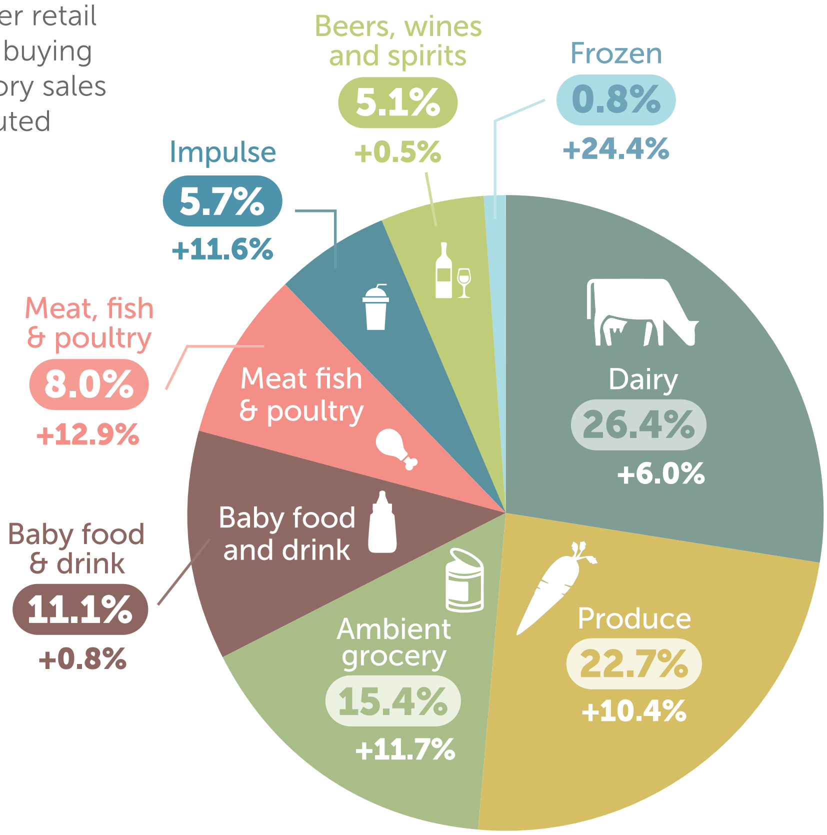
Organic oils, vinegars, canned goods, home baking and cereals drove an 11.6% increase in sales of organic ambient grocery products. Meanwhile, organic poultry and beef sales drove an increase in organic meat, fish and poultry with better retail availability supporting a consumer shift to buying less but better meat. In the impulse category sales of organic soft drinks and biscuits contributed to growth.


Elsewhere, sales of organic beers, wines and spirits remained flat through major retail but enjoyed significant growth in non-major grocery outlets.

*"We've seen growth of organic vegetable sales across all of our retail customers. It is pleasing to see that there is a renewed retailer interest in Organic September and many retailers remain committed to driving organic growth. For us, ensuring consistent levels of supply for on shelf availability, planned promotional activity and working closely with our customers has been key to directing more people to purchasing organic veg."*

**– Joe Rolfe, Managing Director of RB Organics.**

### Breakdown in product shares of the UK food and drink organic market for 2023-2024 and % change in value†




NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company

# Organic staircase

The organic product staircase shows how organic is shopped in the UK today. The infographic highlights how shoppers get on the staircase at the bottom, with core entry points like tea, carrots, eggs and baby food capturing significant market share.

The range of products they buy then grows, moving up to wider produce, home baking and cooking ingredients. The final two steps are key to building a loyal shopper profile.

### First step: entry point to organic

Mature supply chains mean consistent availability in these products/categories. This means consumers can easily form the habit of choosing these organic products.

These products are largely young family staples, showing the desire for trusted brands and certified products at that stage of life.

### Second step: scratch cook and store cupboard

Home bakers and scratch cooks are information and inspiration hungry. Many are seeking new recipes and want to know the origin of the ingredients they use.

This step captures some consumers buying “free from” or special diet products, with organic choices catering for their specific needs.

### Third step: elevating the everyday

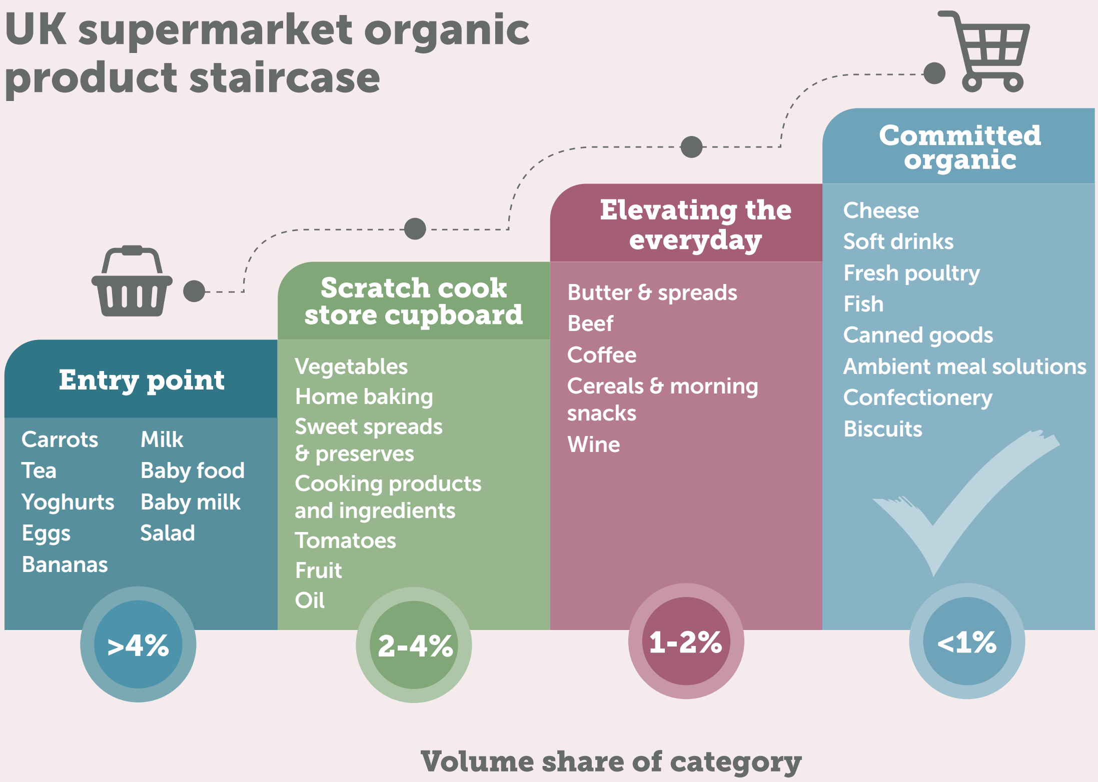
These more committed organic customers are often ambitious cooks, looking for affordable ways to use great quality ingredients.

There are also some less committed organic consumers buying treats such as good wine and coffee where organic has strong links with category quality credentials.

### Fourth step: committed organic shopper

These most committed organic customers prioritise animal welfare, with a greater understanding around farming and curiosity to find out more.

Provenance, both through freshly sourced ingredients and brand storytelling, elevates organic in these categories. They often carry a greater price premium due to difference in production standards.




Source: NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company. Categories chosen with Organic Market value >£25m

# Independent retail

Most indie retailers reported growth in 2024 with the channel rising 9% to top £518 million.

Last year saw independent retailers' bounce back from tough times by focusing on their strengths. Indies won share by offering broad organic ranges backed by local products and a unique experience customers couldn't find anywhere else on the high street.

The Organic Market Report survey revealed over 70% of independent retailers reported organic sales growth in 2024, compared to just 50% in 2023. And only 15% experienced a sales decline, compared to 50% in 2023.

The most common growth driver was retailers' belief that organic aligns with consumer concerns. Plus, cost-of-living pressures eased, and shoppers got more proactive about looking after their health. In fact, health is one of the top three reasons customers shop the organic category. That translates into more sales for indie health stores around trending, functional products like chia seeds, kombucha and tumeric.

## Innovating to thrive

This growth hasn't come without challenges. Living wage increases, plus price competition from retailers, added pressure. The sector responded by focusing on efficiency and innovation.

*"Our response has been to ask how we offer value that's not just about cost,"* **said Phil Haughton from Bristol store Better Food at the 2025 Oxford Real Farming Conference.** *"Our theme for 2025 is 'less is more'."*

**Dan Monks of Manchester's Unicorn Grocery added:** *"To keep food affordable, generate sales and pay decent wages we consolidated ranges and simplified processes. Anything that took extra time we identified... we stripped things back while we kept a super clear focus on our ethical mission."*

## Planet Organic lives up to its name

Planet Organic has refocused on its organic roots by delisting non-organic lines in favour of its original organic USP, underlining its commitment to the category. The flagship independent chain is also majoring in healthy gut products too, through a range of gut-friendly supplements and fermented foods.

## Daylesford Organic reports sales growth

Luxury brand Daylesford Organic has continued to focus on delivering high quality organic products and excellent customer experience. This has resulted in them maintaining sales in store and increasing online sales.

## Suma shows support for animals

In 2024 ethical co-operative Suma developed its Animal Welfare Policy, which requires 100% of single-ingredient dairy products to be certified organic and for all UK products to be Soil Association certified. Customers responded very positively, indicating strong support for organic across the UK.

## A positive future

The good news is set to continue in 2025 with nearly 90% of respondents forecasting growth. The two main ways businesses are looking to achieve this are by building better connections with consumers and distributors and expanding ranges and distribution.

## At a glance

**9%** independent retail channel growth in 2024

**90%** of independent retailers forecast growth in 2025

## Wholesaler snapshot

Key organic wholesalers recorded a 12% increase in organic sales in 2024. Organic wholesalers play an important role in supplying organic through a range of channels such as independent retail, box schemes and hospitality.

Organic wholesale growth is being driven by:

- Growing demand from new, smaller retail businesses. These include smaller box schemes, indie retailers and farm shops who buy more organic products to supplement what they grow themselves. Wholesalers also report more stable sales to well-established and long-standing independent retailers.
- Increased demand and new business opportunities supplying medium and large-scale box schemes.
- Growing opportunities for organic in food service, including hospitality and public sector settings such as schools.

## Connecting consumers

**79%**
**of consumers** said their involvement in Locavore's organic box schemes helped them feel more connected to the origins of their food

**63%**
said the box schemes help shoppers feel more connected to **environmental movements** or **food politics**

# Home delivery

Home delivery schemes bounced back during 2024 with sales rising 3% to £541 million.

In 2024 the changes box schemes made in response to the cost-of-living crisis began to see results. Organic shoppers appreciate their benefits – and are three times more likely to use one (ORC research).

The category made headlines too. Abel & Cole won The Grocer's Sustainability Initiative of the Year for its reusable plastic milk bottles while Riverford launched a hard-hitting campaign highlighting the greenwash of 'fake farms'.

### Riverford sales growth

Riverford saw its sales grow to £110m in 2024, with loyal customers spending more and the organic vegetable box company seeing its biggest Christmas ever. As well as delivering quality organic food, Riverford continues to campaign for a fairer food and farming system – championing sustainable agriculture, supporting a fair deal for farmers, and pushing for a food system that benefits people and the planet.

### Growing (even more) Good

Growing Good has seen its users' sales increase by 10.2% since last year. Founded in 2023, the online platform allows customers to easily add-on items to their veg box, like eggs, dairy and baked goods. With the easy-to-use platform functionality, these add-ons contribute an impressive 23.3% of total basket spend.

"It should mean fuller vans and higher delivery density (lower 'cost per drop') rather than extra vans and drivers on the road – it's profitable growth," said founder Steven Sidhu.

# Foodservice

Foodservice surged 6.5% in 2024, taking the category to £208 million. It's 5.6% of the total organic market, providing plenty of growth potential as food inflation falls and major players accelerate their Environmental, Social and Governance (ESG) commitments.

After a difficult period, green shoots are growing in foodservice. Food inflation fell from a record high of 23%, while the number of UK pubs, restaurants, bars and hotels returned to growth for the first time since 2022 [CGA].

Overall, the sector saw 462 new openings, an average of five a day, between March and June 2024. The bounce-back was particularly strong in midmarket eateries, with casual dining restaurants growing 1.7% [CGA].

However, there are still challenges on the menu, with outlets concerned about minimum wage and National Insurance rises. But despite these pitfalls, as the economic outlook slowly improves, consumers' growing appetite for healthy, environmentally friendly food and drink points the way to a sustainable future. And organic can be a key part of that journey.

## Organic meeting ESG goals

A growing movement of foodservice operators see organic as a practical route to help meet ESG commitments. There's potential for many more to join them.

For example, hospitality specialist CH&Co has a sustainability strategy clearly identifying organic as a way to meet its goals – committing to making 10% of its food and drink organic by 2025. Its Vacherin brand already sources 57% of its milk from organic agriculture.

Meanwhile, Mitchell and Butlers, the UK's largest pub group, showcased its commitment to organic by commissioning an organic beer from Stroud Brewery, christening it 'Gaia'. This was one of the highlights of Soil Association Certification's Tap Takeover – encouraging more pubs to stock organic draught during Organic September.

## Organic fits evolving food trends

Meanwhile, organic is right at the heart of emerging food trends focusing on quality, health and provenance.

This includes the return of high-quality food. According to trend agency The Food People, consumers aren't eating out frequently, but they're seeking controlled bursts of indulgence when they do. This provides opportunities to position organic as a high-quality menu option. The trend chimes with chefs elevating protein sources to highlight health benefits, like using grass-fed organic beef to create a collagen-rich broth.

When it comes to health, plant-based diets are still being prioritised by a growing band of consumers. But they want high welfare, sustainably farmed produce when they choose to eat meat.

The trend for clean eating also continues. Last year the negative effects of ultra-processed food really started to cut through to consumers' choices when eating out. This is good news for organic as some additives aren't permitted and fresh produce is a massive part of the market.

## Food for Life

The Soil Association's Food for Life Served Here (FFLSH) certification supports caterers, schools and communities to create sustainable change through food. Under the FFLSH standards, organic ingredients must make up to 5% of Silver-awarded menus and 15% of Gold-awarded menus.

Last year, there were £7.5 million sales into FFLSH sites, with an estimated 1.35 million FFLSH meals served, up from 1.25 million in 2023. Half of meals served under the FFLSH standards are prepared using at least one organic ingredient, with organic dairy products playing a major role.

While overall organic spend in FFLSH declined in 2024 – a result of high inflationary costs on raw ingredients and squeezed public sector budgets – FFLSH has seen robust growth at universities and visitor attractions.

## Organic Served Here

Organic Served Here is the UK's only organic award for restaurants and cafes. The award helps raise the profile of eateries that source organic while helping consumers find them locally. The higher the spend on organic ingredients, the more stars each business gets.

## Give Peas a Chance

Amazing grassroots schemes are proving what can be achieved locally when communities work together.

Thanks to the Give Peas a Chance project, which launched in April 2024, children at Aberdeen City Council schools can enjoy locally Aberdeenshire-grown organic peas in 11,000 meals until June 2025. This is one of ten innovative pilots from Sustain's Bridging the Gap programme. It aims to enable everyone to enjoy a universally healthy, just and sustainable food system, by reducing barriers to planet-friendly food for people experiencing low incomes.

## National Food Strategy

In January 2025 the government announced an ambition for 50% of food in some public sector settings to be local or produced to high environmental standards.

The development of a National Food Strategy in 2025 provides a key opportunity for government to commit to bold action when it addresses public procurement to provide greater support for organic British food.

The ambitious projects on this page show that consumers want the sustainable produce organic provides. Now it's up to both the public and private sectors to feed that demand.

## At a glance

6.5%

**Foodservice** channel growth in 2024

**Food inflation** fell from record high

FFLSH sees **robust growth** in universities and visitor attractions

# Organic beauty and wellbeing

Demand for clean products with transparent credentials saw sales soar 11% to reach £151 million.

This year's Organic Market Report survey captured how global interest in organic beauty is much more than skin deep.

Most beauty and wellbeing brands (over 65%) had a positive year, increasing both value and volume sales. They reported easing cost-of-living pressures, plus improvements to international trade and UK supply chains, boosted growth.

Best of all, this positive trend is set to improve further in 2025. Over 75% of respondents said they're expecting sales to increase, with only 5% forecasting decline.

## Rising demand for sustainable beauty

Across the world, COSMOS continues to be the leading standard for organic and natural beauty. Kantar research showcases how it's recognised and valued by consumers.

Research with shoppers from countries including France, South Korea and the US found that 73% were more likely to buy a certified product than non-certified. The top three reasons were greater trust, greater perceived quality and health benefits.

## Shoppers seeking sustainable certified products

According to Special Eurobarometer 535 research, 87% of people agreed that to be credible, an environmental label needs to be verified by an independent organisation. Plus, nearly three quarters (73%) said the impact of a product on the environment is important when making a purchasing decision.

Shoppers are increasingly watchful of greenwash. According to research from online retailer OnBuy, 83% feel misled by green and sustainable buzzwords in advertising. For example, vague phrases like "powered by nature" discourage 67%.

## Fighting microplastics

According to the International Union for Conservation on Nature, 2% of the ocean's microplastics come from personal care products.

In fact, intentionally added microplastics have been banned by the EU since September 2023. However, the ban doesn't go far enough. It only targets primary microplastics, not secondary (which come from products breaking down).

SOIL ASSOCIATION ORGANIC
COSMOS ORGANIC

## Trusted by consumers

- **79%** of consumers said COSMOS signalled an all-in-one commitment to environmental sustainability, cruelty-free practices and ethical sourcing
- **82%** thought COSMOS was reliable and could be trusted
- **81%** saw COSMOS as a guarantee of safer products
- **78%** saw it as a guarantee of higher quality and more effective products
- **70%** said it is worth paying a higher price for

More brands are starting to realise shoppers want plastic-free products. There was a 429% increase in silicone-free claims among hair care launches between 2013 and 2023, and a 31% increase since 2020 [Mintel GNPD]. There's also been a 48% increase in ethical and environmental claims in hair care launches between 2020 and 2023.

## WholyMe

*"Being certified gives consumer assurance."*

WholyMe offers both COSMOS Organic and COSMOS Natural certified products designed to treat aches and pains. The rise of home-working has driven more musculoskeletal problems and more consumers looking for alternative ways to manage their pain.

The brand started out in 30 small independent stores, before expanding into nearly 1,000 retailers nationwide in 2024. It's now available in Harrods, Holland & Barrett, Boots and Whole Foods UK.

WholyMe was selected from thousands of brands to pitch to Boots, and chosen after a senior figure tried a balm sample on her chronic hip pain – and found it worked. It's stocked at Boots' pharmacy rather than in general wellbeing. This highlights the brand's efficacy and shows the consumer shift towards cleaner and healthier wellbeing solutions.

## A clear purpose

Founder Celine Ivari says that a clear purpose has been essential to persevering and overcoming challenges. For the brand this means creating truly unique and highly effective products that deliver instant results, especially for aches and pains. She adds that this is often a misunderstood and mismanaged area.


## At a glance

**11%** beauty channel growth in 2024

**79%** say COSMOS signalled an all-in-one commitment to environmental sustainability, cruelty-free practices and ethical sourcing

*"Modern consumers are demanding alternatives to mainstream pharmaceuticals for things like lifestyle-inherent pains. Being COSMOS Organic and COSMOS Natural certified gives this consumer assurance that my products have still been through a rigorous auditing process and use the highest quality ingredients, developing more trust."*

**– Celine Ivari, Founder, WholyMe.**

## Wype

*"Our business has grown 170% over 2024 and being certified organic has been a big part."*

Wype is a natural gel that boosts toilet paper's cleansing power while soothing and moisturising the skin - a wet wipe alternative.

Co-founder Eli Khrapko believes being certified COSMOS Organic has been central to its success. It provides discerning and eco-conscious customers with assurance that Wype's credentials are solid and verified throughout the entire supply chain.

From the start Wype set out to be natural and organic. And being certified helps it stand out in a market where sustainability claims are often unverified and unclear. It's a sign of trust for a category where greenwashing leaves shoppers unsure of what to believe.

Working with COSMOS guidelines meant finding sustainable alternatives. For example, swapping carbomer (a silicone) for xanthan gum. It also led to Wype using high-quality traceable ingredients and avoiding synthetic fragrance.

*"Being COSMOS Organic certified with Soil Association Certification has created a halo effect due to the standard's high reputation not only for sustainability but also product quality. When consumers see that logo, they know that Wype's formula has gone through a strict vetting process, and that we are taking the utmost care and precaution to something that is going to be applied to their most sensitive skin. Our business has grown 170% over 2024 and meeting consumer expectations by being certified organic has been a big part of this."*

**– Eli Khrapko, Co-founder, Wype**

# Organic textiles

## Sales from Soil Association Certification textiles clients increased by 11% in 2024 to £111 million.

Soaring organic textile sales show how sustainability is more than a passing fashion.

Responses to the Organic Market Report survey revealed growth was driven by more investment in marketing and price promotions, plus delivering new products and securing extra routes to market. Many respondents felt organic matched consumer concerns on sustainability.

However, half the respondents said that the cost-of-living crisis had the most significant impact on sales. Other negative effects included international trade barriers, reduced ranging and marketing limitations.

Despite these challenges, two thirds are optimistic about 2025 and forecast a year of growth. The two main factors they felt would have the biggest impact was building the evidence base for organic's benefits and challenging greenwashing.

### Demand for sustainable fashion grows

Fast fashion is changing as the industry faces increasing scrutiny over its environmental footprint. The Ellen MacArthur Foundation reports that less than one percent of clothing is recycled into new garments, highlighting the urgent need for more sustainable solutions.

Meanwhile, a survey by McKinsey found that 67% of fashion consumers consider the use of sustainable materials as an important purchasing factor. This highlights how consumer demand is reshaping the industry landscape.

## At a glance

**11%**

textiles channel growth in 2024

Two thirds of textiles brands are optimistic about 2025

## Spotlight: Continental Clothing

Synthetic textiles are the leading cause of microplastic pollution in the world's oceans. Thirty-five per cent of ocean microplastics come from synthetic textiles – 7% more than the second leading contributor, car tyres [International Union for Conservation of Nature]. Even recycled polyester adds to the problem.

This challenge inspired Continental Clothing to focus on its microplastic-free 100% GOTS certified Earth Positive range. The company has had a GOTS-specific supply chain in India since 2007. It continues to work with the same suppliers, building a long-standing, robust and reliable relationship.

Continental Clothing saw a 20% increase in sales of GOTS certified clothing from 2022 to 2023. Plus, in 2023 its share of GOTS clothing increased to 82%, up from 36% in 2015. Demand is so high that it has abandoned other accreditation schemes to focus exclusively on GOTS.

*"GOTS, in particular the updates in Version 7 which means International Labour Organisation principles have to be met at farm level, means we have an all-encompassing certification for proving our ethics and our sustainability that rendered all other certifications obsolete. On top of this, the GOTS Earth Positive collection was where we saw the most growth as a business. I have therefore put the future of my business firmly behind GOTS certification as it is the most comprehensive for delivering on our promises for people and planet."*

**– Mariusz Stochaj, founder, Continental Clothing Company**

## Toxic metals in tampons

Last year a study from UC Berkley found that tampons can contain toxic metals like lead, arsenic and cadmium. Metal levels varied depending on whether they were brought in the UK, the EU or USA.

GOTS requires testing as part of an annual assessment to ensure these metals don't exceed levels that threaten human health. Right now, tampons can be labelled 'organic' without third-party certification. This demonstrates why certifications like GOTS are so crucial to prevent greenwashing and safeguard human health.

The news was welcomed by Natracare – the brand behind the world's first certified organic tampon. Susie Hewson founded Natracare in 1989, responding to a lack of transparency in the period care industry. The brand makes the results of its independent testing available under GOTS.

"As a precautionary principle and as part of Natracare's annual organic certification audit, tests for detecting heavy metals are commissioned by our UK certification body, Soil Association Certification, and tested by a third-party accredited laboratory," said Hewson.

"These test results of our GOTS certified organic cotton tampons show no detectable traces of heavy metals or other chemicals of concern and are publicly available to offer peace of mind and full transparency."


## Spotlight: Riley

Riley's aim to create period products that are healthier for people and planet has driven a huge 24000% sales uplift between 2023 and 2024.

The key to this rapid growth has been the brand's business-to-business (B2B) arm – which supplies offices and other facilities. B2B supply means Riley has been able to deliver products on a much larger scale than before.

The brand's success is also powered by Soil Association Certification GOTS Certification. With more organisations focusing on meeting ESG goals, being GOTS certified highlights Riley's high sustainability credentials.

When the tampon heavy metal scandal broke, Riley ensured its consumers understood how GOTS certification means a high level of testing, providing peace of mind.

Plus, the business is not just about products. Riley wants to create a movement around female health and women understanding their own bodies, posting positive educational content on social media.

*"At the very beginning of our Riley journey, it was a unanimous decision and went without question that we used only the best quality organic cotton in our products. Achieving our GOTS certification has been a real driver in our success to date. It's the gold standard in organic and sustainable production and it reinforces our commitment to providing the highest quality, eco-friendly period care. Having our products independently tested gives our clients and customers confidence that they're choosing a product that's truly kind to their bodies and our planet."*

**– Fiona Parfrey, Co-Founder of Riley**

# Organic farming

Although government figures for organic farmland in 2024 have not yet been published, data relating to land certified by Soil Association Certification indicates that organic farming is on the rise.

## What organic farmers told us

- **43%** saw organic value sales (how much sales are worth) rise, while **38%** said they remained flat.
- **36%** saw organic sales volume (the amount of produce they sold) increase, while **45%** said they remained flat.
- The most significant challenges facing farming businesses are extreme weather events, government grant funding and business input costs (like the cost of organic seed).
- Farmers have mixed feelings about government funding grants:
  **40%** feel negative or extremely negative
  **37%** feel neither negative or positive
  **22%** feel positive or extremely positive.

Source: Organic Market Report survey

## Organic sector overview

- In 2023 the organic dairy sector significantly contracted due to low milk prices and high feed costs. But dairy farms still in business are now seeing prices recover and demand increase.
- After a price spike during the Ukraine war organic grain prices have dropped, reducing farm input costs – though climate change and global political uncertainty are still affecting the sector. The UK had a hard winter and spring after very wet weather.
- Organic eggs and poultry are being bolstered by strong growing demand, with many enterprises based in Northern Ireland.
- Some beef and sheep farmers left organic certification due to low payments for permanent pasture farms in England and Wales and limited access to abattoirs. However, fewer animals in the national herd has led to good prices for organic.

Organic farming is essential for delivering the UK's climate and nature goals.

As the gold standard for sustainable farming, underpinned by a thorough set of legal standards, it has been shown to deliver many environmental benefits.

But the amount of UK organic farmland is falling behind other nations, even though there's been a recent rise in farms converting. This is despite the clear advantages of organic farming – and a growing market for organic produce.

In fact, the percentage of organic land share has remained largely static in England, representing just 3% of the country's farmed area.

In 2023*, 498 thousand hectares were farmed organically in the UK, down 2.1% compared to 2022. This falls far behind the average of 10% organic farmland across the EU, with countries like Austria topping 25%.

* 2023 is the latest recorded organic land statistics by DEFRA. 2024 figures are expected to be published in May 2025.

In 2023, 60% of UK organic land was in England, 23% in Scotland, 15% in Wales and 1.4% in Northern Ireland. Scotland bucked the trend with organic land increasing 11.8% in 2023, boosted by the Scottish government's commitment to doubling the amount.

Despite the decline, more recent figures show that the amount of in-conversion land that Soil Association Certification certifies more than doubled between January 2024 and January 2025. Soil Association Certification continues to see entrants to organic, particularly in horticulture and livestock, including some larger farms and estates in Scotland.

## Success in Scotland

Scotland has seen a strong increase in organic land managed under the Scottish government's Agri-Environment Climate Scheme since 2021. Mairi Gougeon, Cabinet Secretary for Rural Affairs, Land Reform and Islands said:

"The significant increase in organic land managed under the Agri-Environment Climate Scheme (AECS) is a testament to Scotland's commitment to sustainable farming and environmental stewardship. As at the end of 2024, we've seen over 49,000 additional hectares of converted and maintained organic land under AECS management, representing a remarkable 69% increase since 2021.

"This progress brings us closer to meeting our ambitious Programme for Government target of seeking to double the area of land used for organic farming by 2026. Scotland's farmers and land managers are playing a vital role in enhancing biodiversity, tackling the climate crisis, and building a sustainable future for our rural communities and islands."

The Scottish government continues to back organic farming by requiring farmers to create a whole farm plan for nature and climate against five impact areas. Organic farmers will automatically qualify for two impact areas, helping to reward and drive organic production.

## Growing business case for organic

There's a strong business case for organic in sectors like arable farming, strengthened by government funding and other financial incentives.

For example, while there are winners and losers from England's Sustainable Farming Incentive (SFI) and Countryside Stewardship scheme, organic arable farming attracts good SFI payments. Right now farmers are increasingly concerned about future cashflow as basic payments are phased out. As they look for new sources of income, the financial reward for shifting to organic could incentivise new entrants in 2025.

## Unlocking growth through Organic for All

There's a big opportunity to increase UK organic production by focusing on import substitution (swapping imports for home-grown produce). It can be particularly effective in areas we know the UK climate is well adapted to produce, like root crops, brassicas, top fruit and arable crops.

As part of the Soil Association Group's vision for Organic for All, cross sector activity is now underway in arable, fresh produce and dairy.

## The industry needs robust national action plans

Government-backed Organic Action Plans, which bring together different sectors around one goal, can rapidly accelerate organic growth. Given the growing gap between the organic market and organic production in England, a government-backed OAP is desperately needed to secure a thriving future for the sector and unlock economic, environmental and public health benefits. The English Organic Forum, of which Soil Association is a member, has been working with DEFRA to create a blueprint for a successful plan.

In January 2025 13 NGOs including Greenpeace, RSPB and The Wildlife Trusts signed the Soil Association's open letter to England's Minister for Food Security and Rural Affairs. It urged the government to back an Organic Action Plan to boost organic production and consumption, with a target for 10% of agricultural land to be farmed organically.

# The leading regenerative standard

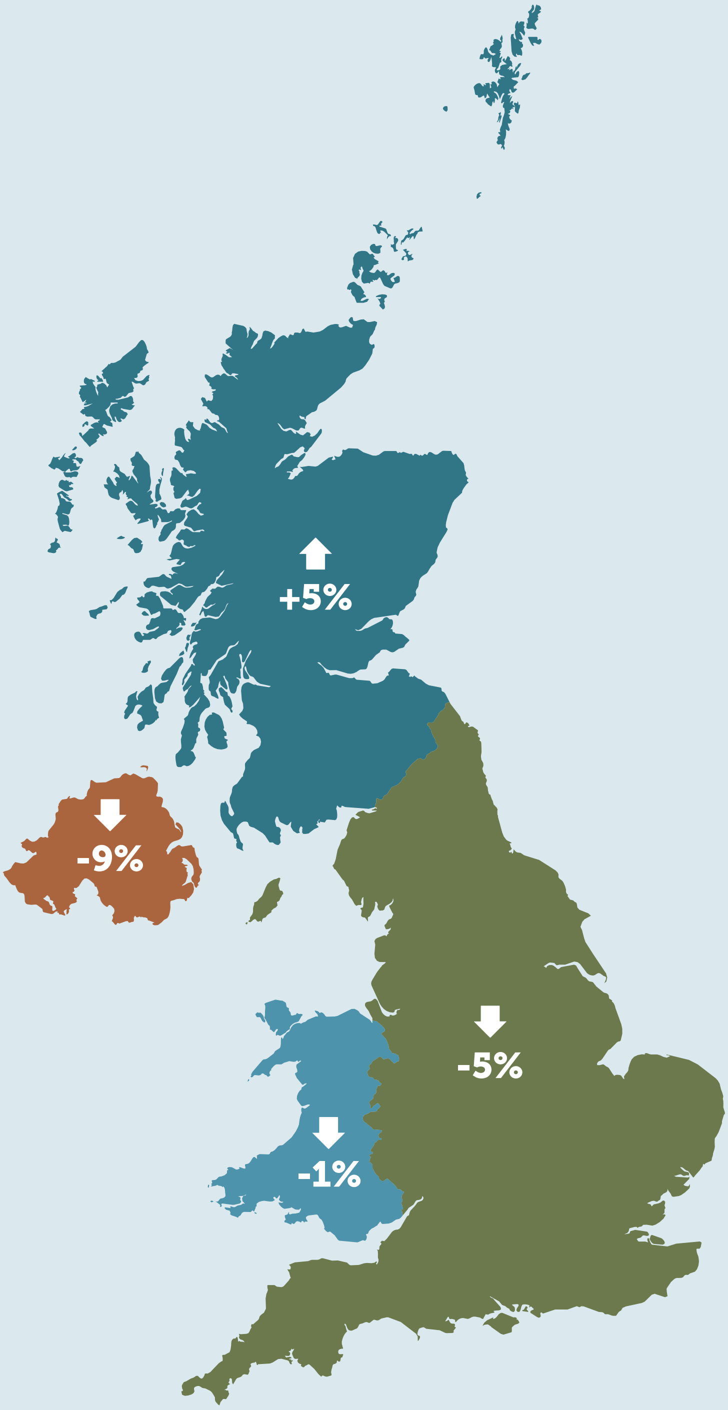
There's strong industry interest in regenerative agriculture – a set of principles focusing on improving soil health through reducing tillage [preparing soil], diversifying crops and extending rotations with livestock. It aims to deliver restorative outcomes on farms.

Organic farm standards insist on a whole farm system approach to sustainable farming that starts with the soil but goes much further. Organic farming incorporates many beneficial regenerative practices to build and improve soil health. And it also maintains some of the highest UK animal welfare standards while prohibiting artificial weedkillers and pesticides with the aim of building soil health, biodiversity and ecological balance.

Organic farms are independently audited and verified. But there is currently no legal definition for regenerative farming in the UK. Organic is the leading regenerative standard, one that's legally defined and protects against greenwashing. What's more, organic is proven to deliver a range of restorative outcomes, such as on average 30% more wildlife on organic farms, 25% more soil carbon storage and more soil microorganisms.

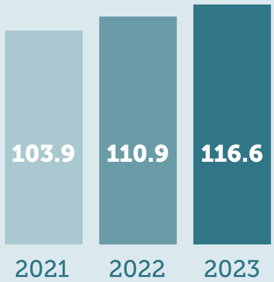
The benefits of organic for people, animals and planet are clear. Now the sector needs proper government commitment, and support from the supply chain around domestic production, to unlock the potential of organic farming in 2025 and beyond.

# Distribution of organic land and processors/producers (hectares 000s) in 2023




## Scotland

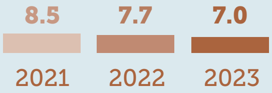
Distribution of organic land and processors/producers (hectares 000s)




Processors/Producers:
**521 (-1%)**

## Northern Ireland

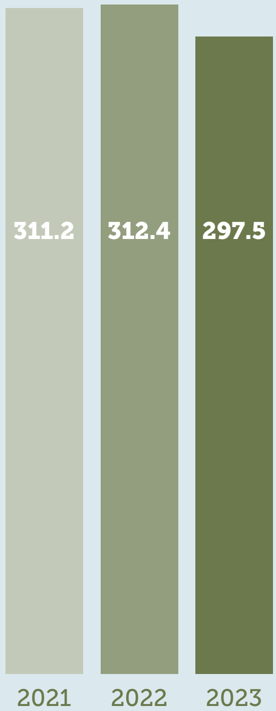
Distribution of organic land and processors/producers (hectares 000s)




Processors/Producers:
**188 (-7%)**

## England

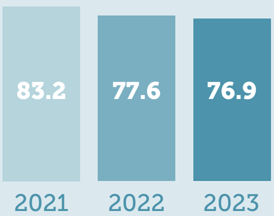
Distribution of organic land and processors/producers (hectares 000s)




Processors/Producers:
**3882 (-5%)**

## Wales

Distribution of organic land and processors/producers (hectares 000s)




Processors/Producers:
**639 (-4%)**

| | 2020 | 2021 | 2022 | 2023 | Year-on-year change |
|---|---|---|---|---|---|
| Fully organic UK land | 457.6 | 464.7 | 468.3 | 462.2 | ↓ -1% |
| Land in-conversion | 31.3 | 42.0 | 40.3 | 35.7 | ↓ -11% |
| Total UK organic land | 489 | 506.6 | 509 | 497.9 | ↓ -2% |

DEFRA Organic Farming Statistics United Kingdom 2023

# Global organic

While policymakers increasingly recognise the importance of organic, and many key markets continue to grow, uncertainty around future international trade persists.

Last year, the European Commission (EC) sent a powerful signal that organic is a sustainable solution that should be scaled around the EU.

With European farmers tasked with delivering sustainable goals, EC President Ursula von der Leyen commissioned a cross-EU dialogue to develop a shared vison for the future of EU farming. This approach acknowledged policy had to match farmers' economic interests while balancing the needs of communities and the environment.

The resulting 110-page report explicitly namechecks organic production as a solution and recommends it should be increased. It recognises organic farming as the only legally defined and regulated sustainable production system in the EU – and that it can meet the needs of both farmers and the planet.

The EC specifically recommends that organic should be supported with balanced supply and demand, investment in an EU logo and conversion funded through the Common Agricultural Policy, plus more research and education.

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### Organic is mentioned in three of the EC's recommendations. It states that:

1. Currently organic is the only sustainable production system regulated by EU legislation, which ensures its sustainability through strict production and processing principles, accompanied by third-party control and certification.
2. Organic farming contributes to biodiversity protection, climate change mitigation, soil health and water quality while creating profitable opportunities and engaging diverse demographics.
3. Organic methods are influencing practice in other sectors.

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## EU organic highlights

In France[†], organic stores' turnover increased 7% during the first three quarters of 2024 compared to the same period in 2023. In the first 10 months of the year key retailer Naturalia's turnover jumped by 5% compared to the same period in 2023. Meanwhile, in the first three quarters of 2024, La Vie Claire's increased by 7.6%.

During the first 10 months of 2024, French retailer Biocoop's turnover increased by 8% to reach €1.63 billion. The brand estimates that it will reach almost €1.7 billion for the whole of 2024. This increase is supported by a boost in footfall (+7.5%) and average basket spend (+1%).

However, in overall retail, sales of 'fixed-weight' organic products fell by 4.2% in value during the first three quarters of 2024 compared to 2023.

In Italy[††], retail sales have also been growing compared to 2023. Yet, because of inflation, volume sales are still lower than in 2021.

Meanwhile, across the Netherlands[†††], organic grew 10% in the first six months of 2024, while the rest of the market dropped 2%. This meant organic grew 12% faster than the total market. Retailers report no negative signals on the horizon, with potentially double-digit growth for 2024.

## Uncertainty in the largest market

Driven by emerging trends for international food plus the rise of health, including gut health, growth in US organic remains strong. The US market grew 3.4% in 2023 to reach $67 billion. Should the market continue to grow at this rate, it could reach $255.65 billion by 2034.

As with many other markets, higher inflation in non-organic has closed the organic versus non-organic price gap. The US category is mainly driven by larger retailers, who are increasingly looking to regenerative agriculture to help differentiate themselves.

[†] Agency Bio [††] Universita Politecnica Delle Marche [†††] Bionext

### Organic export prospects – accessing market in the Middle East

*"International trade has always been an essential part of the Gusto Organic sales mix. From Benelux and Czech Republic to Singapore, The Seychelles and now across the Middle East. I'd say to any organic brand – look seriously at international sales – with an enhanced consumer focus on health, clean label, ingredients, people and planet, organic delivers on the button to a vast global audience."*

**– William Fugard, CEO Gusto Organic Ltd**

The US organic sector may now have a powerful ally in Robert F Kennedy Jnr, the new Secretary of the Department of Health and Human Services. He has a mandate to 'go wild on food' from Trump and promises to transform agriculture and 'get pesticides out of the food supply'.

However, commentators at the US Organic Trade Association note that when last in office Trump took an axe to environmental regulations and rescinded pesticide bans. So, it remains unclear what a new White House administration will mean for US organic farming and future dependency on imports.

There's also uncertainty about how the new Trump administration will treat the UK. Should UK food and drink exports avoid the high tariffs the EU is currently braced for, it may still be impacted indirectly.

## China: growing demand for organic

China's appetite for organic products is growing in tandem with the growing affluence of Chinese consumers.

They see pollution and animal welfare as national problems, sharpening their desire for more sustainable and healthier products. As a result, organic suppliers can more easily start conversations with buyers for key retailers, who are increasingly interested in the category.

However, despite this, state protectionism, bureaucracy, and lack of regulatory alignment with the UK mean traditional export opportunities remain hard to unlock.

Historically a significant importer of organic animal protein, China's domestic organic livestock production is growing fast, with China becoming increasingly self-sufficient, and even seeing surpluses. An overall reduction in reliance on imports and increased domestic consumption of its own produce is anticipated to further diminish China's significance as an organic export prospect.

[Source: IFOAM Country Office – China]

## Unlocking exports

For many years the UK organic sector has been demanding specific organic commodity codes from the government. This vital information would give the sector robust data on international goods movements. It would help businesses visualize the opportunity and plan how to fulfil it. It's also essential for making the case for export support.

Soil Association Certification continues to lobby hard on this point with DEFRA officials to create much-needed change.

# The year ahead

Working together to make sure organic is valued, supported and available in 2025.

In 2025 the Scottish government's Organic Action Plan is set to be published.

This could be a big moment for organic, creating a blueprint for what's possible by engaging farmers and landowners, connecting supply chains and growing local demand.

There are currently no government-backed plans for other nations. So, in the absence of wider government direction, the Soil Association Group founded a movement to achieve Organic for All.

Organic for All identifies a clear need for organic to be valued, supported and available to achieve its market potential. So far, despite recent growth, the category is falling behind similar countries. But in 2025 there's the potential for the industry to come together and create change.

## Organic is valued

Grocery retail has the biggest impact on sector performance. Now that organic is outperforming non-organic there's a clear commercial case for buyers to boost their range or address under-trade in the category.

In the shadow of climate change, the entire food industry is coming together with a plan for net zero, with WRAP and IGD coordinating developments. Organic players are well-placed to influence the industry's focus for the future.

This is very likely to catch policy makers' attention, coupled with the latest alert from the UK Climate Change Committee (CCC). Currently there's an 18% net gap between government plans and legally binding carbon targets, with the CCC citing a lack of policies for agriculture and land as a key contributing factor.

## Organic is supported

Through Organic for All, positive plans for the horticulture, dairy and arable sectors will continue to gather pace in 2025. Together, sector players will share knowledge on organic and collaborate to reduce supply chain gaps and blockages.

At a regulatory level, changes to Certificates of Inspection for border control (COIs) have been delayed a third time and will continue to leave uncertainty around future international trade.

Public sector procurement continues to be a key opportunity, with a relatively high level of political consensus that's only missing treasury investment to deliver it.

## Organic is available

Coordinated activation moments like Organic September encourage more shoppers to buy organic. But the appeal goes beyond awareness events.

Nearly two-thirds of the public are actively seeking out organic products. Expanding local access to organic food is a key opportunity for shopper frequency and repertoire. These routes to market already exist – box schemes, independent retailers and farm shops all provide shorter supply chains and benefit local producers.

Clear online communication continues to evolve, particularly in light of the EU green claims code. Holland & Barratt is integrating the Provenance platform [which provides validation of sustainability claims] into its website for this very reason. This ensures trusted certifications are robustly evidenced in back-end data, to support consumer claims.

As the UK continues to recover from the cost-of-living crisis the argument for organic is clear. Now's the time for government and retailers to unlock the true potential of organic and turn this vision into a reality.

# Navigating new corporate sustainability obligations

In 2024 regulators in both the UK and EU continued their focus on sustainability.

The EU's Green Deal – a groundbreaking package of sustainability regulation which impacts multiple sectors – is setting the pace, and countries like the UK are also recognising the need for action.

The sheer volume of law which has come into force, or is sitting in the pipeline, is a challenge and opportunity for businesses of all sizes, whether in or outside the EU. Just last year we have seen the introduction of the Corporate Sustainability Due Diligence Directive, the launch of a consultation on the UK Sustainability Reporting Standards, and the last-minute delay of the European Union Deforestation Regulation.

Among the volume of laws, there is convergence around some key areas: supply chain due diligence, sustainability reporting, green claims, sustainable finance and the circular economy.

For the organic industry, it is anticipated that supply chain due diligence, sustainability reporting and green claims will be the most impactful as they present the most obvious opportunity. Complying to organic regulations may give businesses a head-start in areas that could become mandatory in the future.

With our significant technical and trade experience, Soil Association Certification is closely monitoring the evolution of the regulatory landscape. We will continue to advocate for the organic sector with policymakers and beyond and will share updates on the opportunities and threats as we identify them.

# About Soil Association Certification

We're the UK's leading sustainability certification body, offering a range of best-in-class organic and sustainable certification schemes across food, farming and forestry.

## Amplifying organic

We certify the majority of UK organic food processors and work with around 3,700 clients in the organic supply chain. These range from small farms to large organic brands, processing plants and retailers. The Soil Association organic symbol is the most recognised in the UK.

## Supporting responsible forestry

We certify and inspect forestry management and chain of custody across the world, including the globally recognised and trusted Forest Stewardship Council® (FSC®) and Programme for the Endorsement of Forest Certification (PEFC). As one of the largest forestry certifiers globally, and a founding partner of FSC, we manage more than 4,800 certificates in over 70 countries – covering a total forest area larger than the UK.

We're also stepping up to meet the challenge of deforestation in international supply chains. Agricultural expansion is estimated to be responsible for almost 90% of the world's deforestation and degradation. We're on a mission to support companies transitioning to the EU Deforestation Regulation. By adapting our due diligence training and verification work, we support responsible sourcing of all forest risk commodities, from soy to coffee.

## Safeguarding climate and landscape

We're leading the way in high integrity carbon markets, now offering validation and verification to some of the most credible UK land-based carbon schemes dedicated to transparently monitoring carbon emission reduction and removal. This includes the UK Woodland Carbon Code and Peatland Code.

## Fuelling impact

As the world turns its attention to decarbonising Agriculture, Forestry and Other Land Use (AFOLU), we're ideally placed to tackle some of the biggest climate and biodiversity crises of our time. Our sustainable schemes provide businesses an opportunity to harness solutions that work with nature, for people and planet. We help them build trust with consumers, growing confidence in sustainable purchasing and driving impact by restoring climate, nature and health.

Soil Association Certification is a company of the Soil Association, an innovative charity with over 75 years of expertise in practical food, farming & forestry solutions. All Soil Association Certification profits are either given to the Soil Association Charity or reinvested into the certification company to help grow the organic market. Through our certification work and by sharing our profits, we help the Soil Association develop practical food, farming & forestry solutions to restore nature and ensure good food for all.

## Certifying organic with Soil Association Certification

As a fully accredited and independently audited certification body, organic certification truly represents products you can trust. By choosing to certify with us, you can take advantage of a range of exclusive benefits, with additional marketing, technical and supply chain support. You'll also get market and consumer insights, helping you add value to your products, and feature the Soil Association symbol. We also work in partnership with our clients to engage consumers, retailers and policy makers to drive organic market growth.


## Find out more about certification

Call: **0300 330 0100**

Email: **goorganic@soilassociation.org**

Visit: **soilassociation.org/certification**

# Understanding Organic

"Why is that cow wearing a Fitbit?"

"Does healthy soil smell different?"

## Join us for an on-farm learning experience

**What to expect on the day:**

Fun and fascinating sessions led by Soil Association Certification experts to help build your knowledge of organic principles, commercials and consumers

A delicious local and organic lunch

A comprehensive farm tour with an experienced organic farmer to get you close to nature and bring organic principles to life

Tea and cake before we bid you farewell

**Held at Yeo Valley HQ, Blagdon, BS40**

**Dates available throughout the year.**

**Find out more at:**
**www.soilassociation.org/understanding_organic**

Soil Association CERTIFICATION