UK Organic Update

2025

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Soil Association, UK.

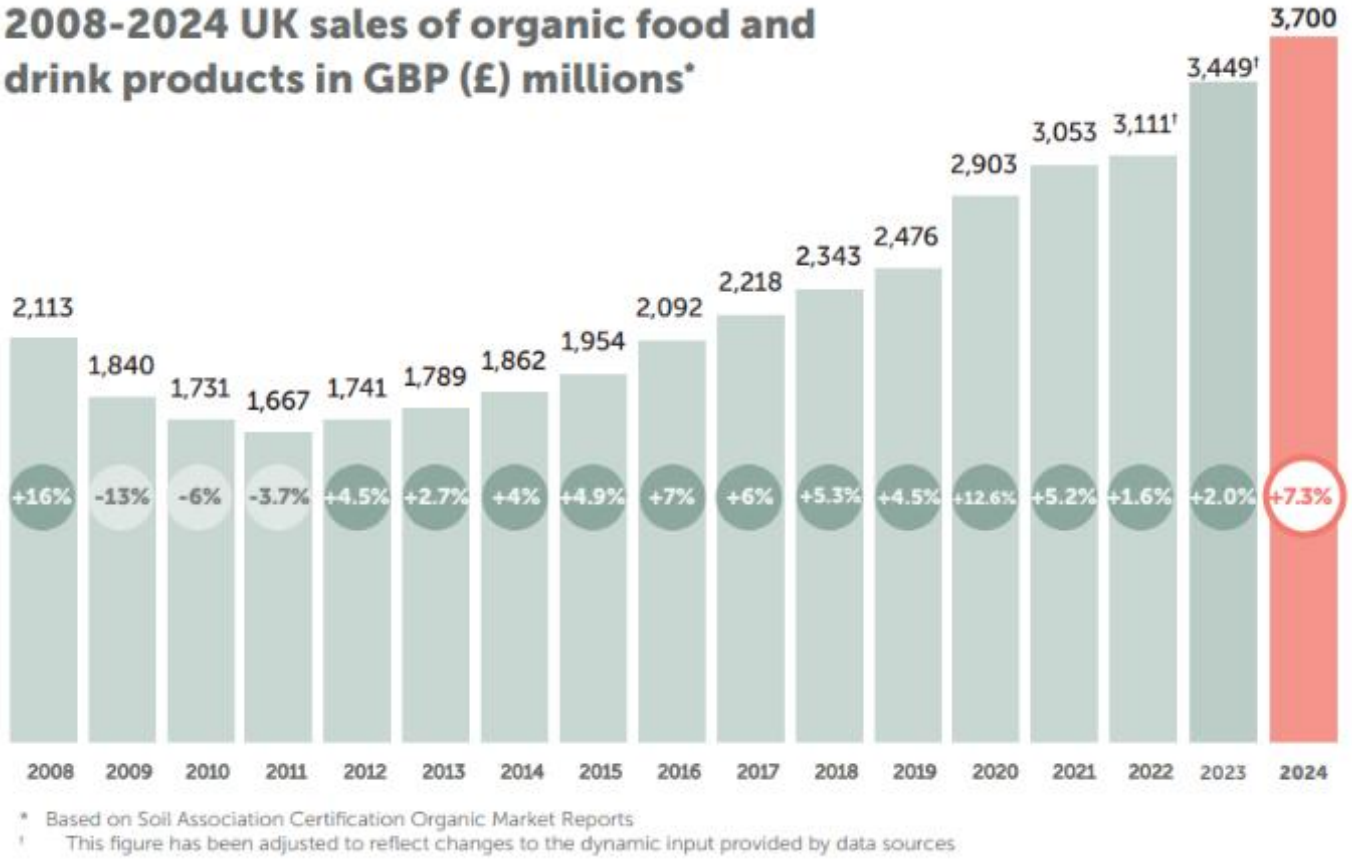
The UK Organic Market

Organic market now its 13th consecutive year of growth

£3.7 bn
(€4.3bn)

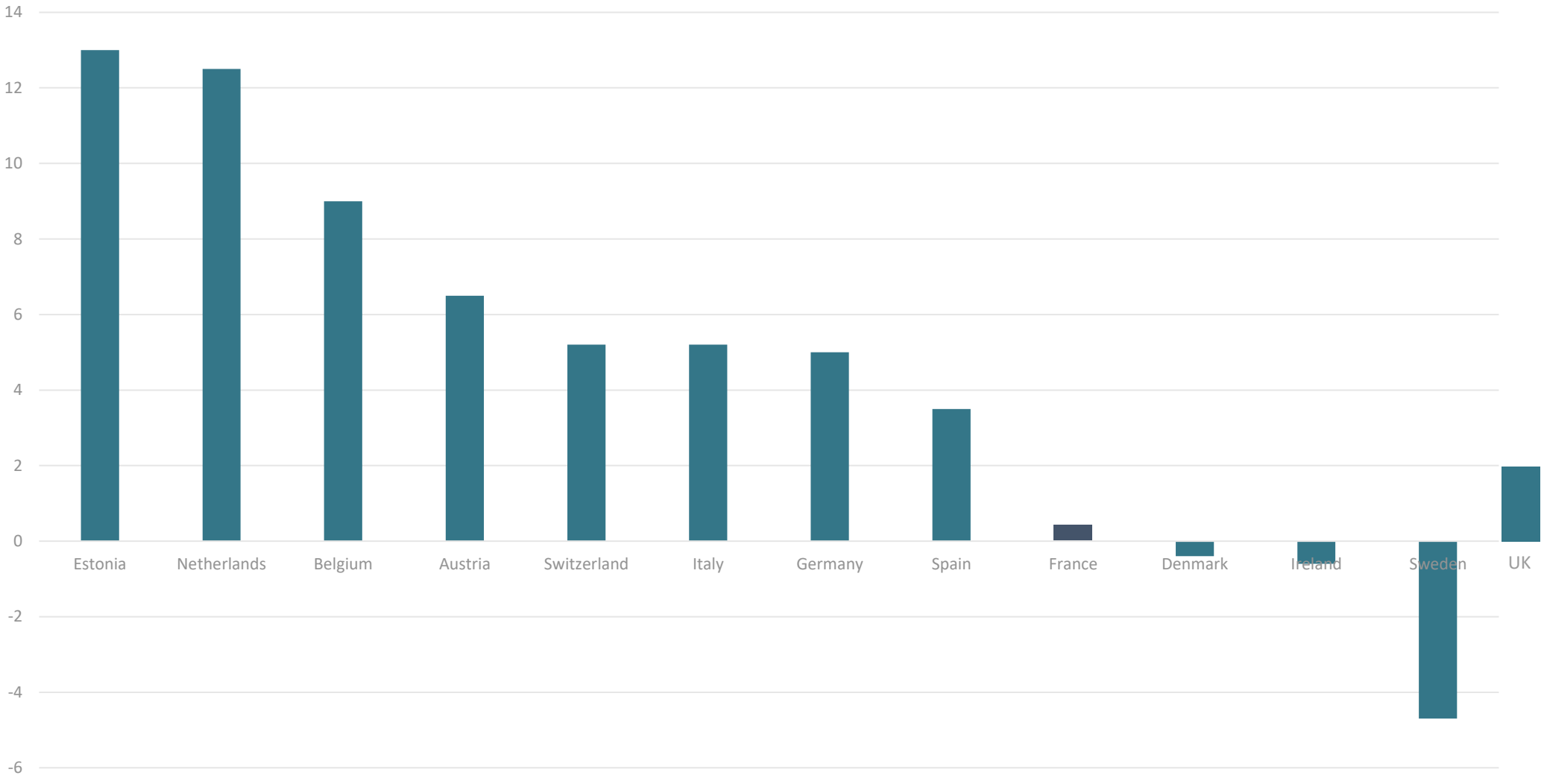
Total organic
food and drink market

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



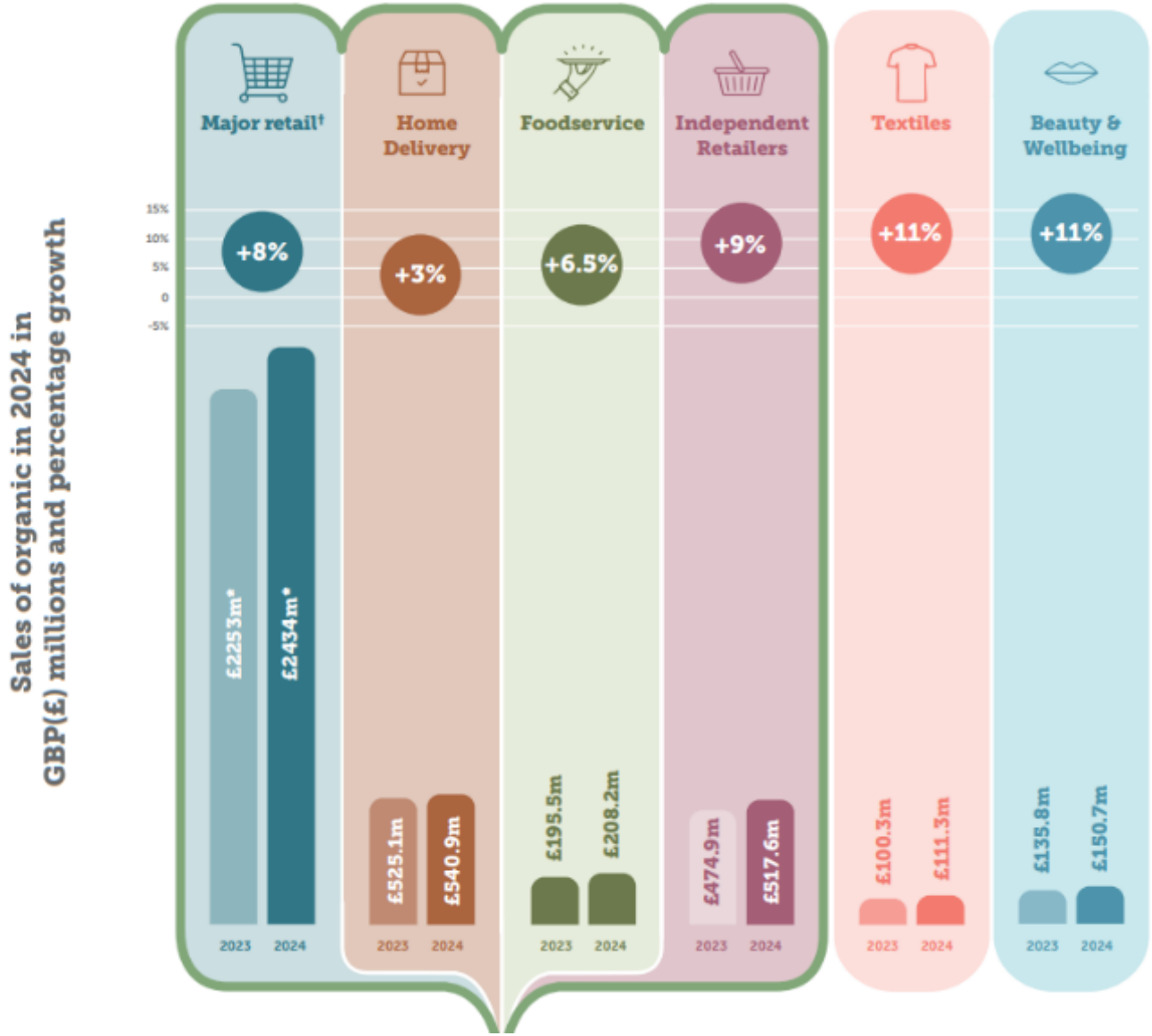
* Based on Soil Association Certification Organic Market Reports
† This figure has been adjusted to reflect changes to the dynamic input provided by data sources

Key organic markets - % value growth in 2023 (Finland -6%)



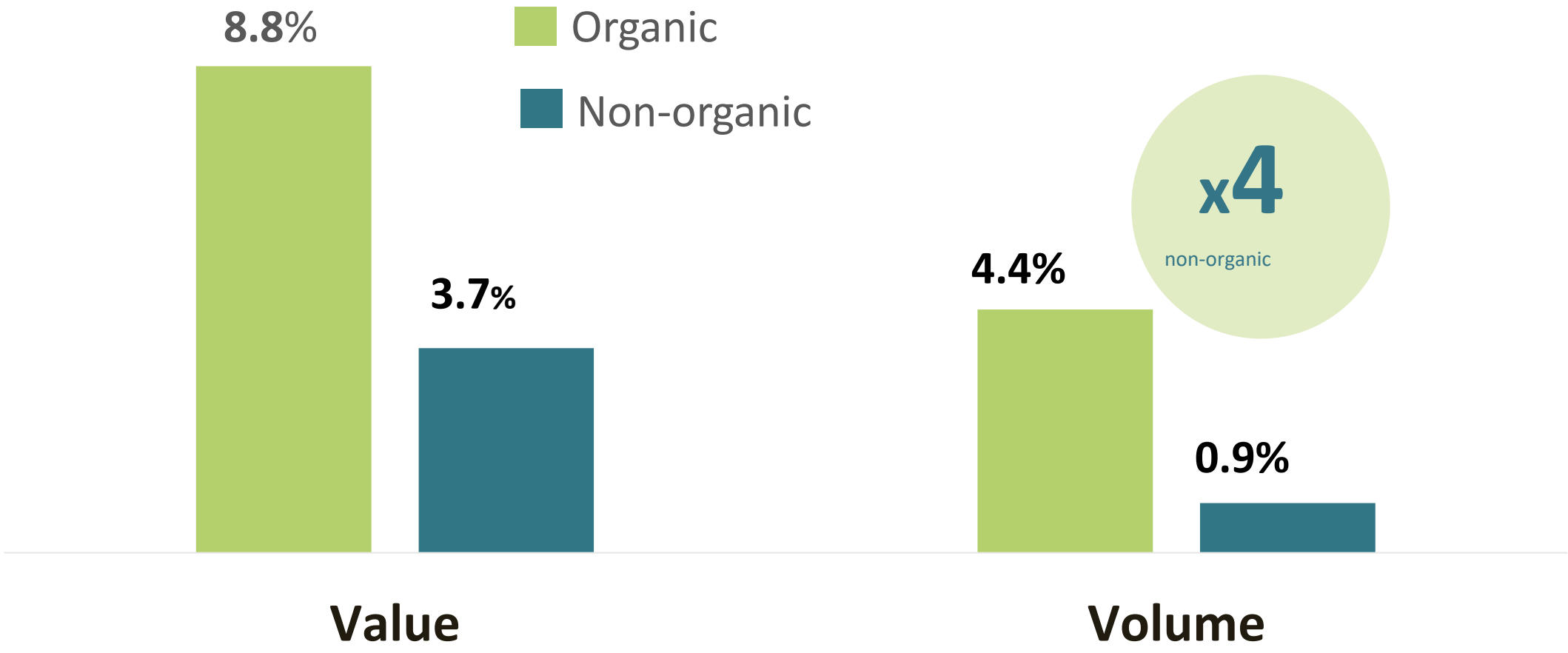
Sources: FiBL - AMI, B,

Growth across all organic channels



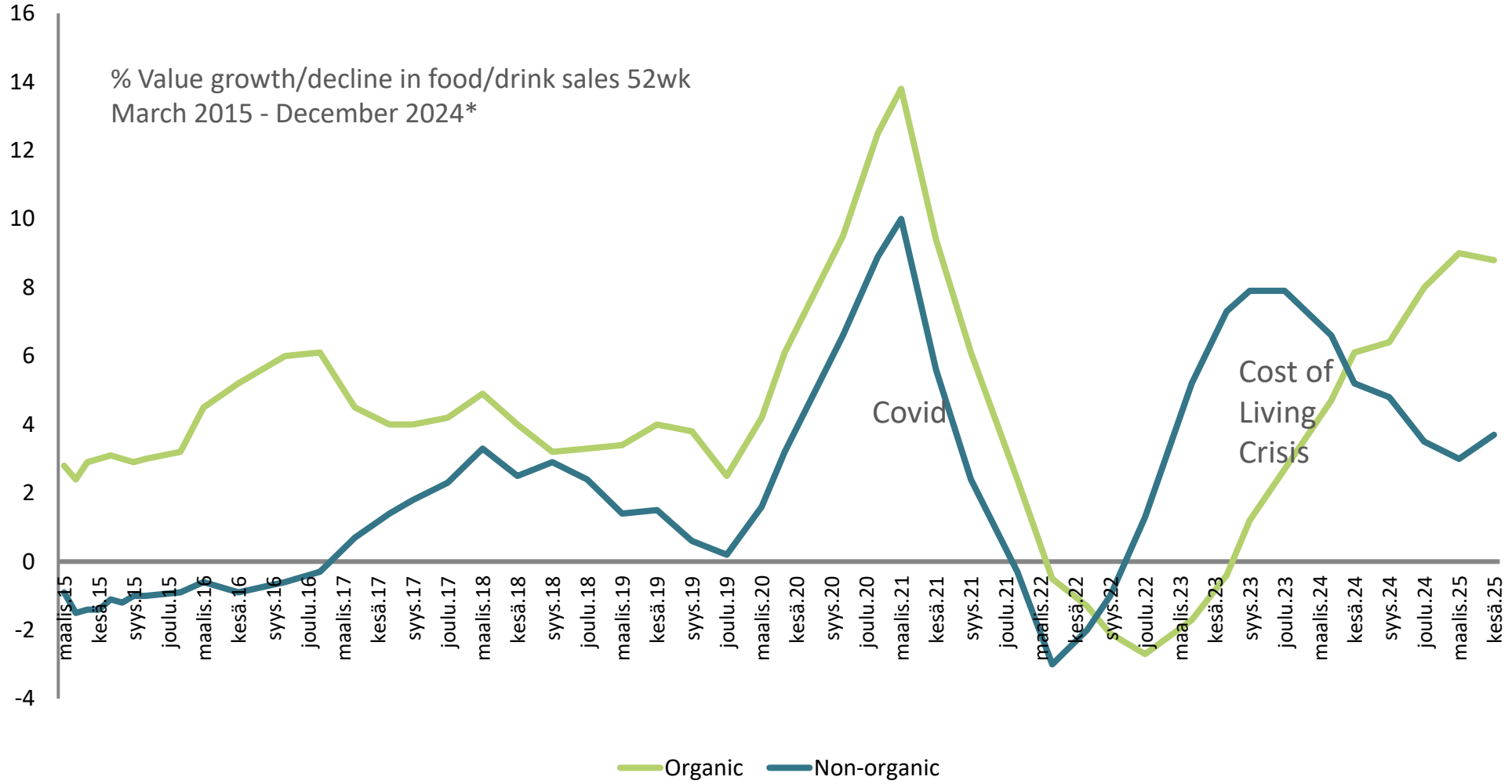
- Strong growth in both independent retail and major retail
- Home delivery bounced back and returned to growth
- With food inflation easing, foodservice grew

Organic has outperformed non-organic food and drink with strong rises in both value and unit sales (June 2024 – June 2025)



NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 7th June 2025 GB Total Coverage @ 2025 The NielsenIQ Company.

Organic value growth continues at +8% in 2025, now significantly outperforming non-organic

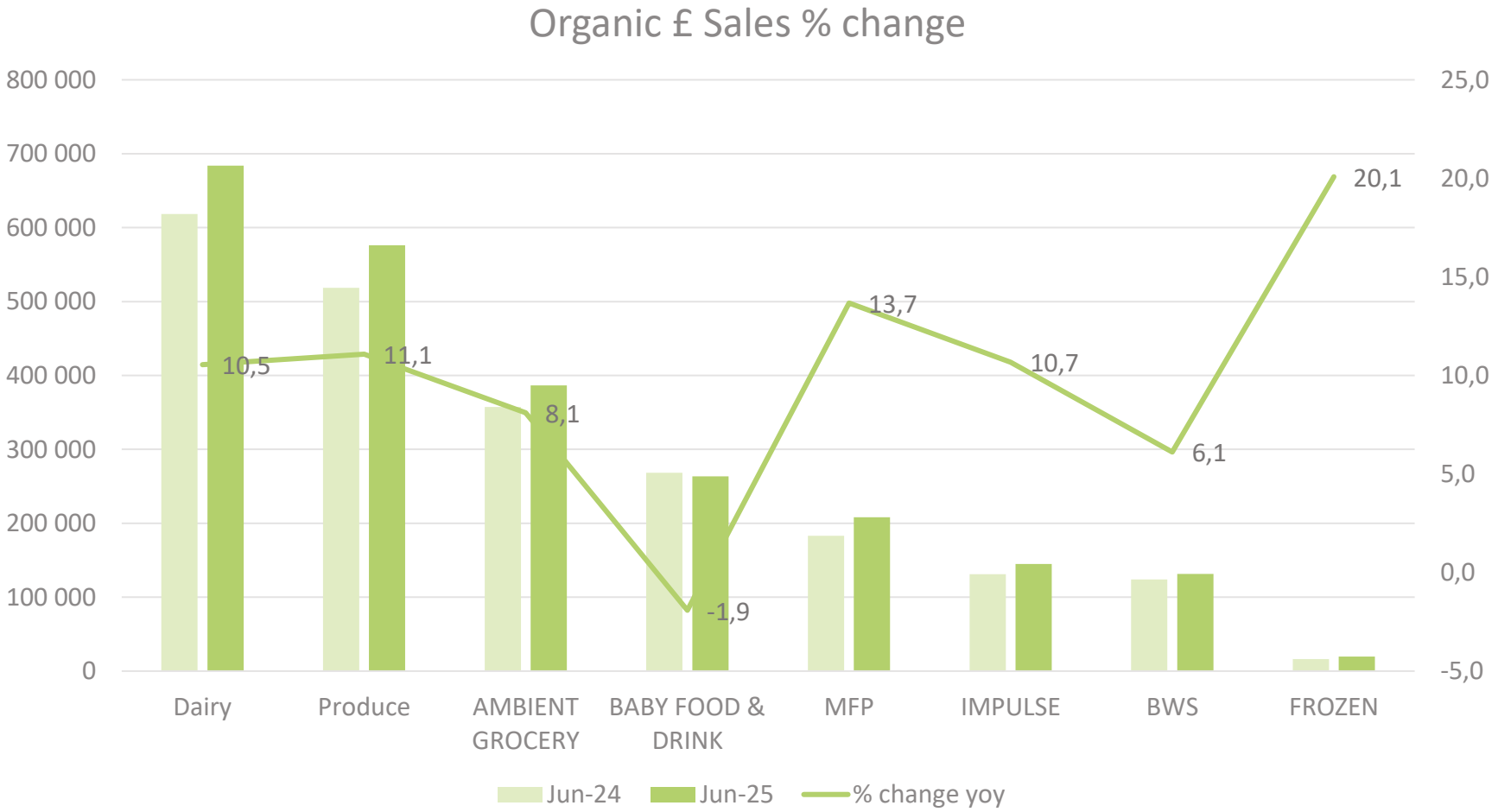


Data to 7th June 2025
8.8% organic growth

+5 percentage points vs non-organic

* Based on historic NiQ Scantrack Data for the Organic Food & Drink category Soil Association Certification defined, GB Total Coverage

Meat Fish & Poultry, Produce and Dairy have seen the greatest uplift in the value of organic sales (June 2024 – June 2025))



Dairy and Produce account for 50% of all organic sales

NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 7th June 2025 GB Total Coverage @ 2025 The NielsenIQ Company.

The organic heavy-weights – products and sub-categories with the highest sales

49%

Organic sales in supermarkets are dairy or fruit & veg

Baby food

Milk

Yoghurts

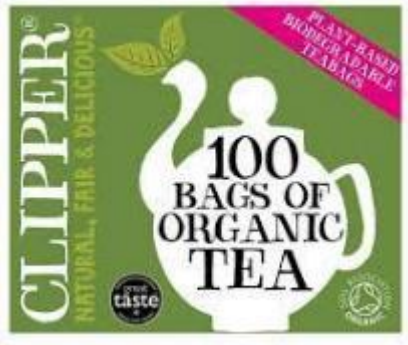
Bananas

Eggs

Carrots

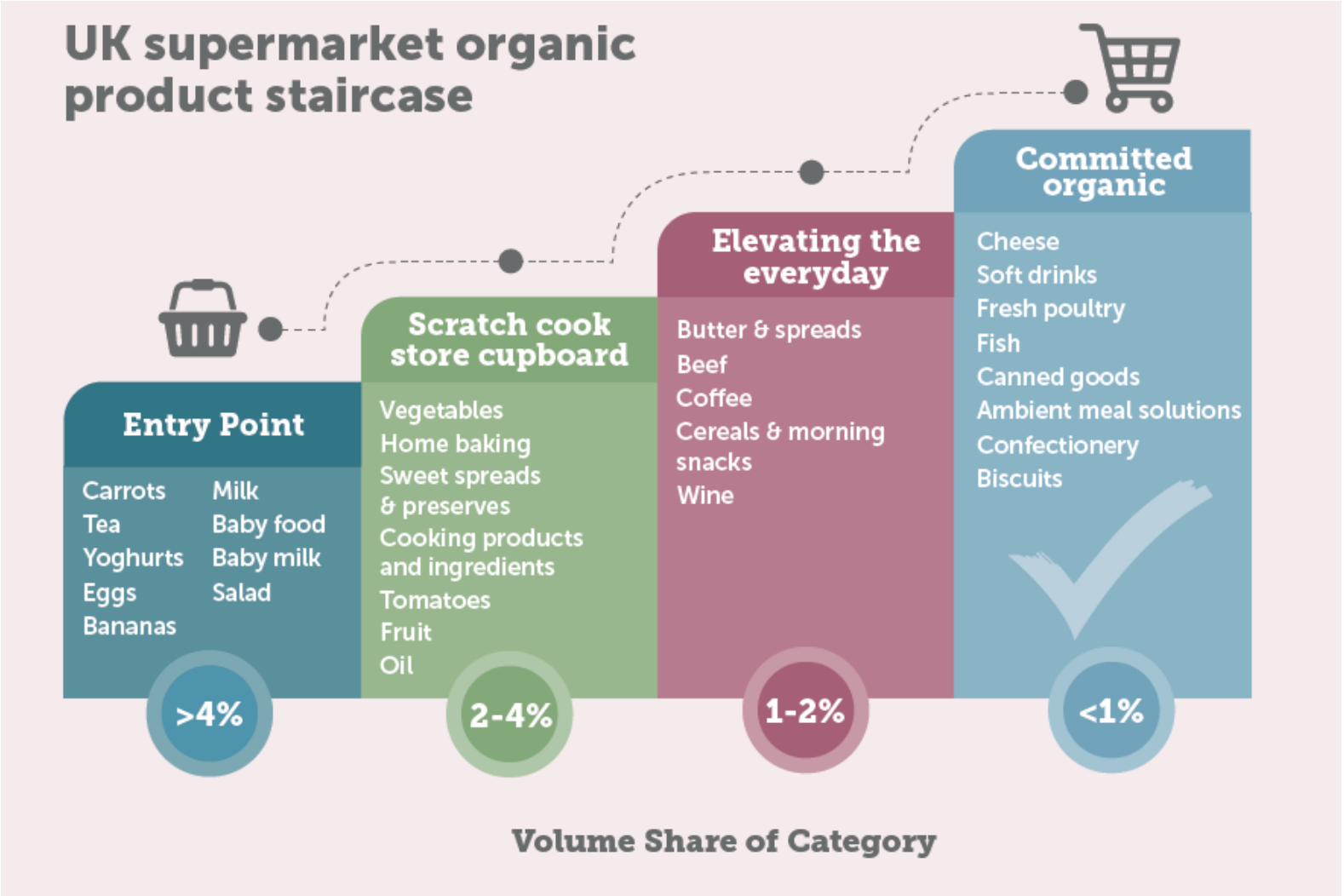
Salad & fresh veg

Hot Beverages



Canned goods

Growing the organic shopper frequency through repertoire is a key strategy for growth



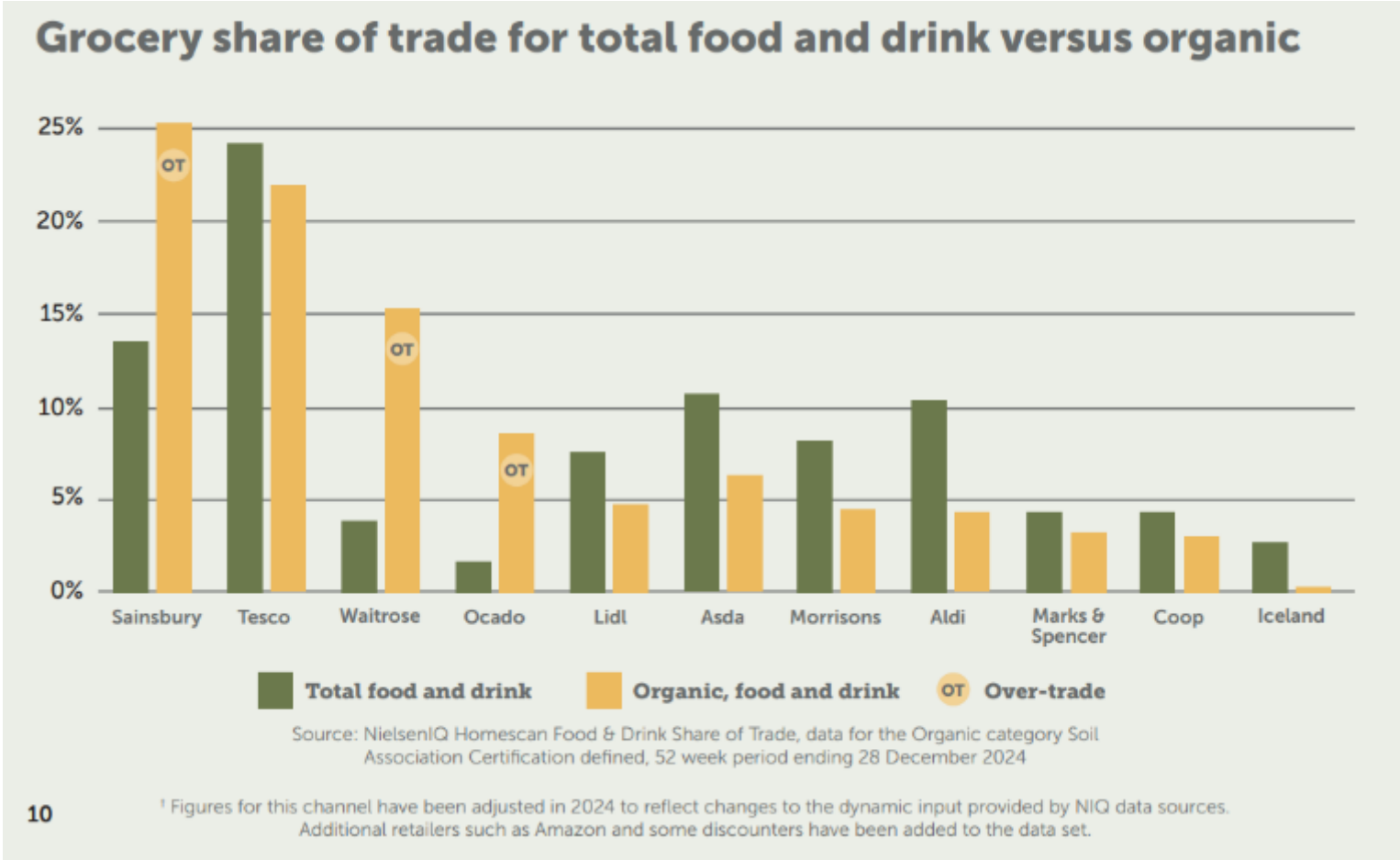
Source: NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company. Categories chosen with Organic Market value >£25m

Retail share of trade: Sainsbury's, Waitrose, Ocado still considerably overtrade

➔2024 saw further shifts in supermarket share of trade on organic, with momentum at all ends of the market, from Tesco (+1.6%) to Lidl (0.5%)

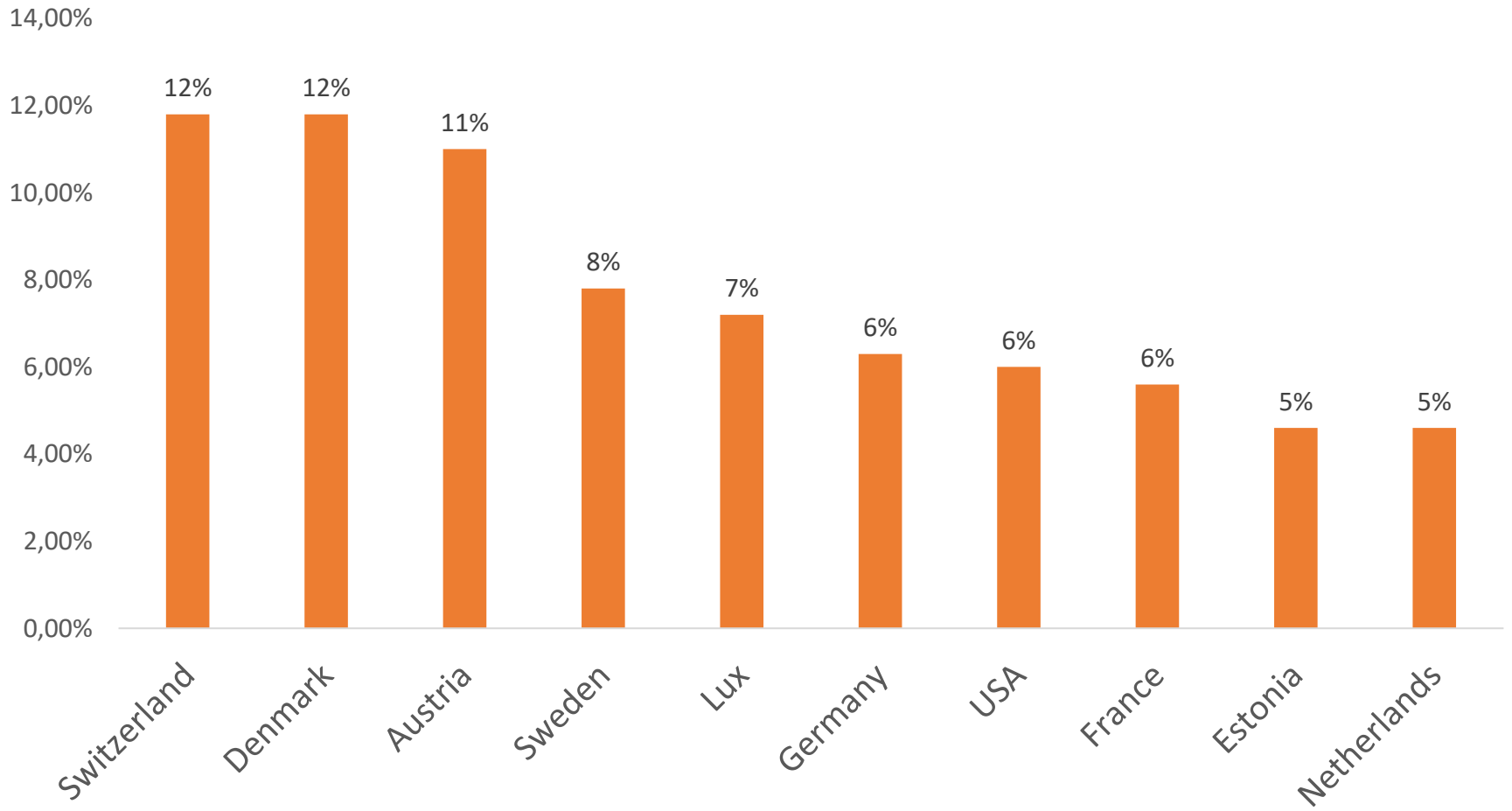
➔23% of all supermarket organic purchases are made online, twice as much as all grocery at 13%

➔M&S grew organic sales by 10% in 2024, followed by Lidl



At 1.7% Organic Grocery market share has room for growth when we look to other major markets in 2023 (Finland is 1.9%)

Global market **+1.5%** €136.5bn in 2023



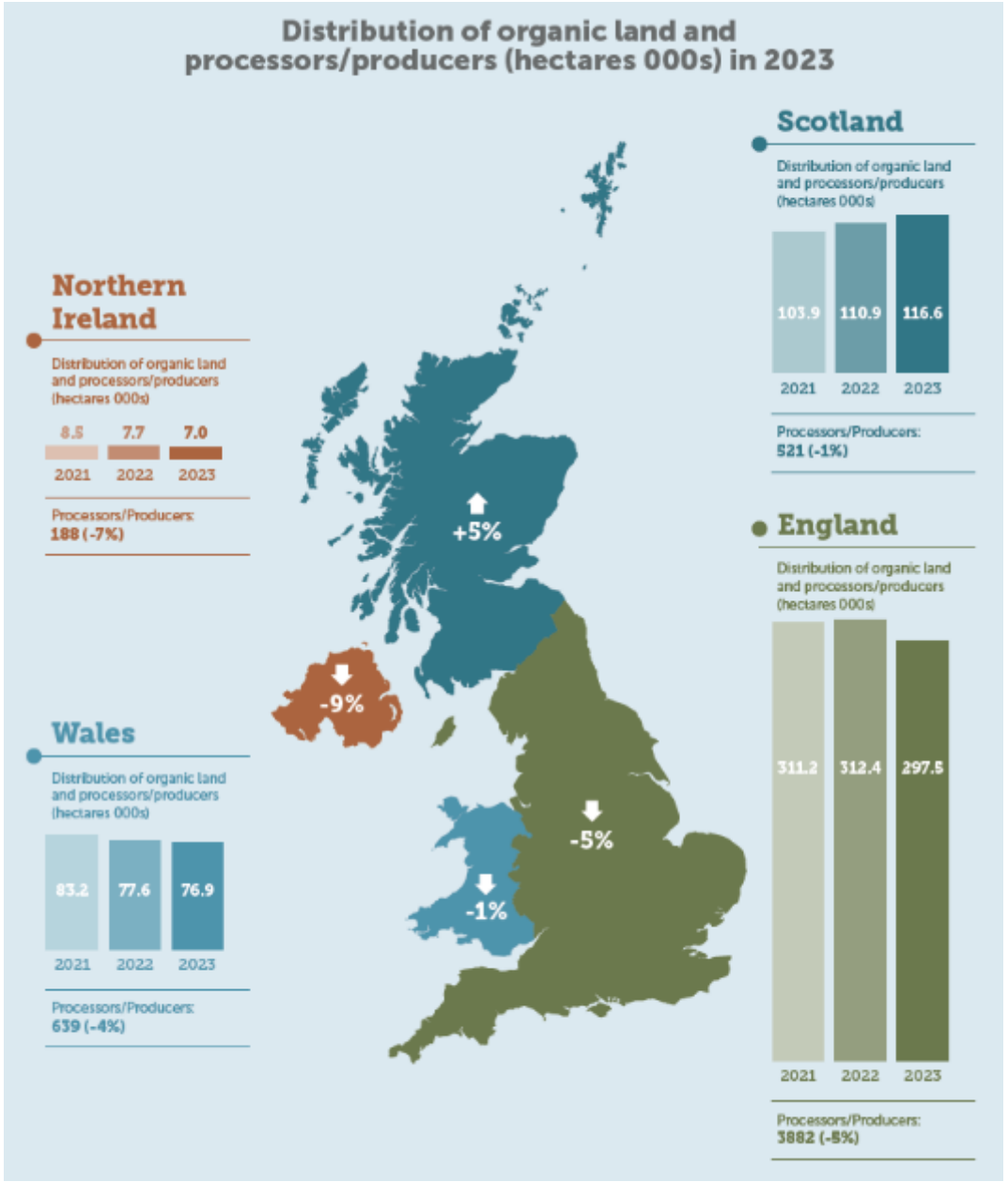
Source: Organic % of retail sales FiBL- AMI 2023 data published Feb 2025

Organic Farming

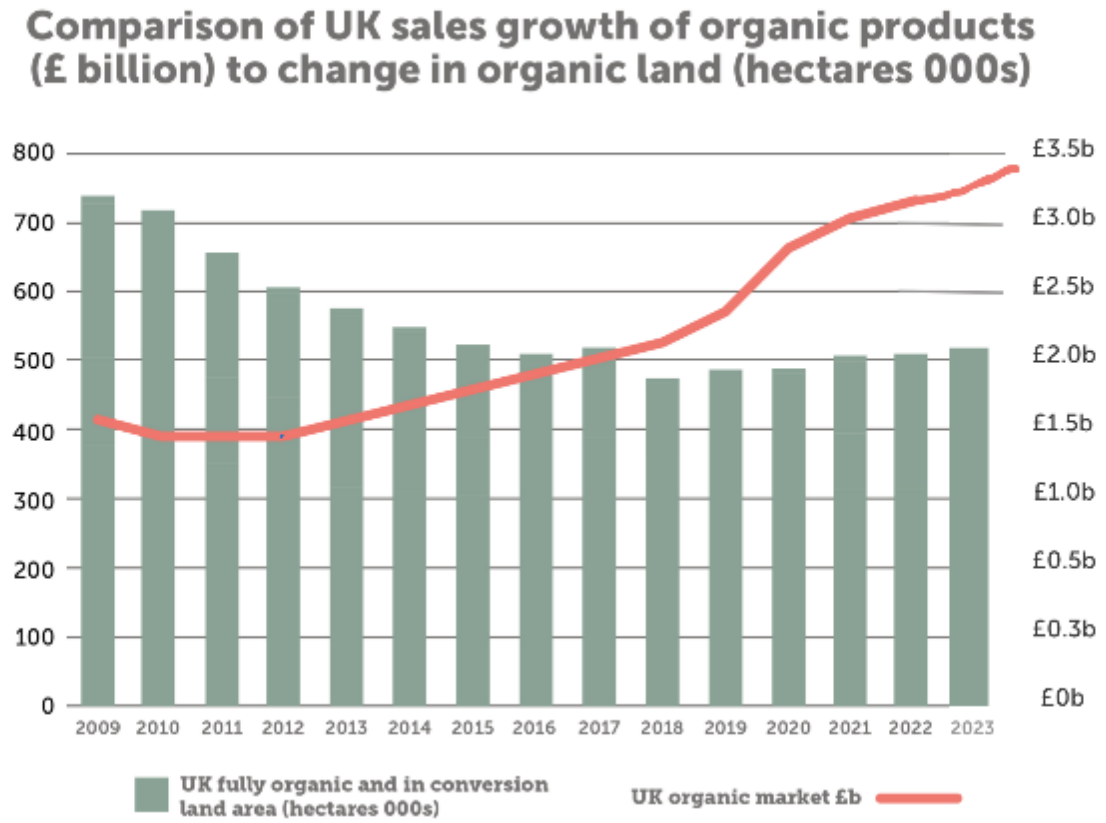
81% of farmers reported either flat or increased organic sales

Recent increases in Soil Association Certified organic land in conversion

Further Government support and robust supply chains are needed to bolster UK organic farming sector



With a 13th year of market growth – something has to change in UK organic farmland



Source: DEFRA Organic Farming Statistics 2023 (June Survey of Agriculture as at 1 June. Excludes common land)

Trade challenges

Who is the organic customer?

Almost 7/10 (67%) of shoppers intentionally purchase organic

"Quality ingredients" (x2)

"Reducing meat" (x2)

"Free from" (x3)

"Low carb diet" (x3)

Top reasons to shop organic

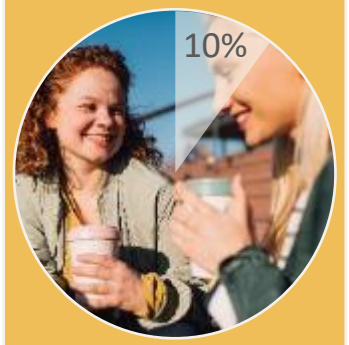
#1 No artificial pesticides

#2 Higher standards inc. animal welfare

#3 Personal health

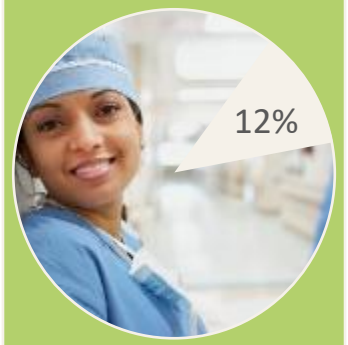
Source: Organic Research Centre research, Spring 2024, 2,000 UK respondents; Organic shoppers 2-3 times more likely to agree with diet and attitudinal statements vs non-organic shoppers

Younger low & middle income households are embracing organic living



Enthusiasts

- Buy 4+ categories
- Younger families; Students; C2DE
- **Looking for local & UK provenance**
- **Buying for health, quality & trust**
- Managing budgets looking for deals

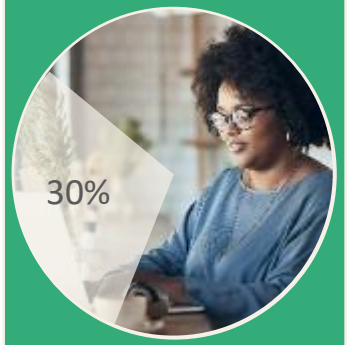


Regulars

- Buy 2+ categories of organic 'must haves'
- Most ambitious cooks
- More C1C2 HHs
- Fixed repertoire, **seeking quality & health**
- Managing budgets looking for deals

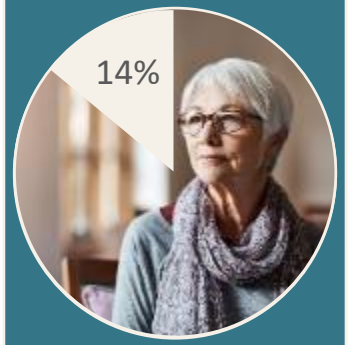
Occasionals

- Buying as a **treat / on special occasions**
- Working older families; empty nesters
- More likely male



Deal-seekers

- Buying **on offer or closest price to** conventional
- Most ABC1, shopping at M&S, Waitrose
- Cook most from scratch



Reducers

- Engaged but cut back during cost of living crisis
- Focused on food budgets
- Feel organic is too expensive for them

Highest frequency & repertoire

- Shopper values around health, quality & dietary needs are driving cross-category shopper frequency of organic
- The most high income segment are lower frequency deal-seekers

Source: Organic Research Centre quant research, Spring 2024, 2,000 UK respondents

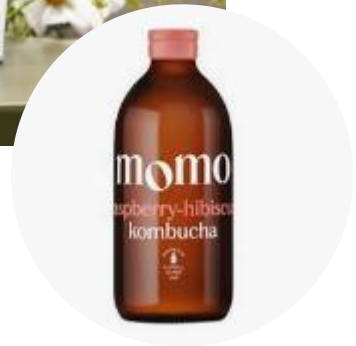
Organic food will make me feel good!

The truth about **organic** food - according to science | **Tim Spector**

42%

18–24 year buy organic at least once a month

Half of UK 25–34yr olds feel happier buying organic



Mail Online

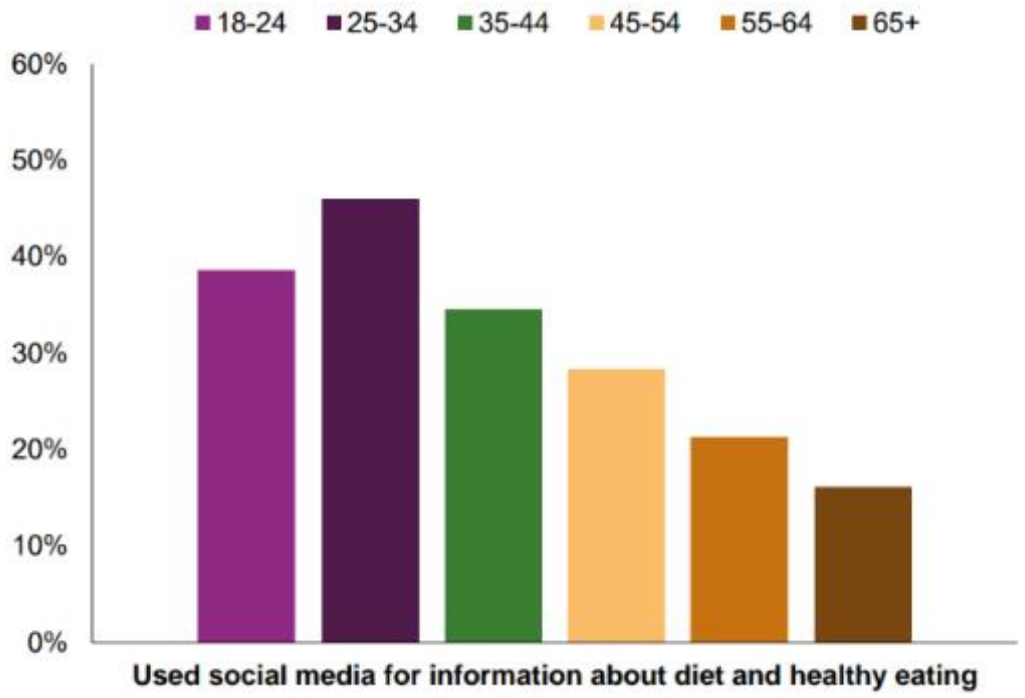
Now Gen Z ushers in 'organic living': TikTok influencers are fuelling the trend for eco-friendly diets as study reveals nearly half of young people want healthier produce

- **The Soil Association Certification surveyed 2,000 adults in the UK**

Social media as an information source

For younger consumers, social media is a mainstream media

"When you want to know more about food and health, which of the following have you used in the past 6 months?"



Both local news coverage (7%) and national news coverage (4.5%) of organic stories positively impacted organic sales (organic milk sales)

Social media is a great tool for increasing organic sales. The following topics: price posts (6%), health posts (9%) and environmental posts (5%) all statistically significantly increased organic sales.

Sources: New Nutrition Business 5-country survey 2024 & "Effectiveness of real-world marketing of organic foods and beverages: A systematic review of recent evidence" – Edinburgh University, Aug 2024

Effectiveness of real-world marketing of organic foods and beverages: A systematic review of recent evidence

Price promotions positively impacted sales and were particularly effective in fresh organic categories

Arranging organic products in a cluster or by brand had a significant, positive impact on organic market share and also positively impacted customers' attitude towards the organic range.

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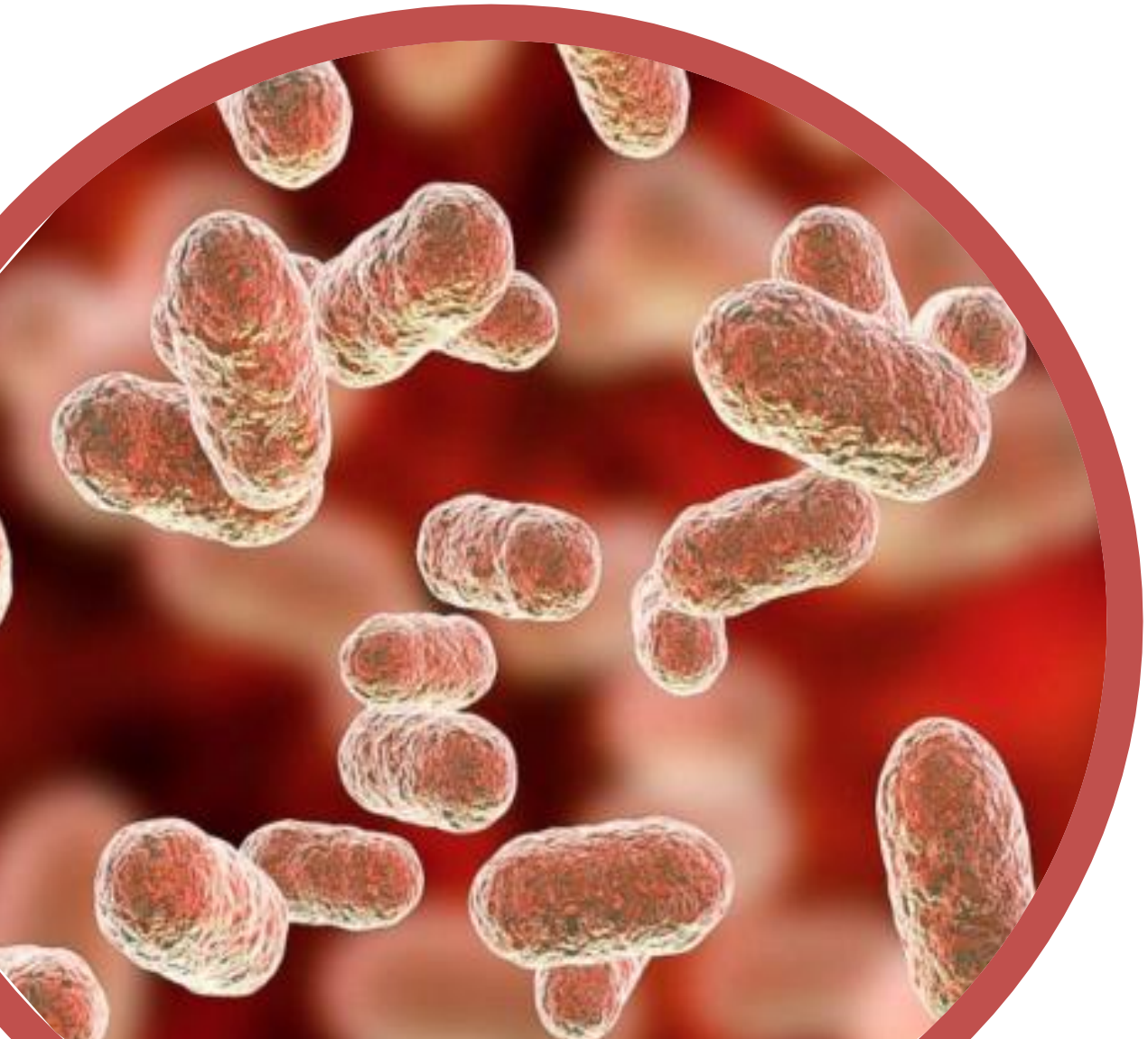
Hot Topics

Better for your gut health?



ELSEVIER

Environmental Toxicology and Pharmacology
Volume 100, June 2023, 104149

Low-dose glyphosate exposure alters gut microbiota composition and modulates gut homeostasis

Peter C. Lehman [a 1], Nicole Cady [b 1], Sudeep Ghimire [a], Shailesh K. Shahi [a], Rachel L. Shrode [c], Hans-Joachim Lehmler [d], Ashutosh K. Mangalam [a d e 2]

https://doi.org/10.1016/j.etap.2023.104149

Highlights

- Low-dose glyphosate exposure modulates gut microbiota composition.
- Depletion of *Bifidobacterium* and *Lactobacillus* after glyphosate-exposure.
- Gut microbial alterations are associated with a pro-inflammatory response.

“Elevating truly regenerative agriculture”

Statement from the Organic Movement

Full statement HERE

Organic is regenerative

HEALTHY SOILS ARE AT THE HEART OF ORGANIC SYSTEMS

Organic farmers use a range of regenerative practices to build soil fertility without relying on artificial fertilisers.
Studies show that, on average, soil on organic farms store more carbon[1] and have higher levels of soil microorganisms[2]

Long and diverse crop rotations

Growing nitrogen fixing legumes

Applying manure and composts

Cover cropping

[1] Climate Xchange "Organic farming, net zero targets and the impact of a changing climate – an evidence review" (2023)
[2] Henneron, L et al. (2015) 'Fourteen years of evidence for positive effects of conservation agriculture and organic farming on soil life', Agronomy for Sustainable Development, 2015, 35:1 169 – 181 doi:10.1007/s13593-014-0215-8.

Organic regenerates soils, and also...

Avoids artifical inputs derived from fossil fuels

Works in harmony with nature by avoiding pestcides

Has the highest animal welfare standards

Has standards which cover the entire supply chain

Has fewer additives and preservatives

Organic farming is a whole system approach to sustaining the health of soils, ecosystems, and people

Organic is regulated by law

"Sustains and enhances the health of soil, water, plants and animals"

"A sustainable management system for agriculture"

"Respects high animal welfare standards"

"Makes responsible use of energy & natural resources"

View organic regulation code
https://www.legislation.gov.uk/eur/2007/834/article/3

Certified organic standards cover the way items are produced, prepared, stored, imported, exported and sold, helping to protect against greenwashing

Elevating truly regenerative agriculture

"The organic movement welcomes the focus on regenerative principles and practices where it delivers truly transformative food and farming systems and caution against use of the terms in ways that divert attention, policy, and investments from more transformative solutions."

IFOAM ORGANICS INTERNATIONAL

Thank you

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