# **Organic market report 2012**

# Methodology and data sources

## The organic consumer

Data/insight on organic consumer spending supplied by Kantar Worldpanel. Further material from Leapfrog Research/Organic UK.

## The UK organic market

Multiple retail sales calculated using a combination of organic turnover data for 2011 supplied by five retailers – Co-operative, Morrisons, Sainsbury's, Tesco and Waitrose – and an estimate of sales for Asda and Marks and Spencer obtained by applying Kantar Worldpanel's measurement of year-on-year sales performance to these retailers' 2010 organic sales figures. Together these seven retailers account for over 90% of multiple retail sales, and Kantar data on their market shares in 2011 were used to extrapolate a figure for total multiple retail sales from their combined turnover figure.

Box scheme, farmers' market and farm shop sales calculated using data from a Soil Association survey of independent retailers (January 2012). Other independent retailers' sales calculated from a combination of Soil Association survey returns from licensees and Kantar Worldpanel data on sales through non-certified high-street chains such as Spar, Londis, Costcutter and Mace. Catering market calculated with reference to Soil Association survey returns from licensees operating or supplying restaurant and catering businesses.

#### Organic farming in the UK

Organic land area, numbers of producers and regional distribution data collected by Defra from the organic certification bodies. Organic abattoir data taken from a survey conducted by the Soil Association in January 2012. Abattoirs were asked for a market prediction, and this was weighted against their 2011 throughput to give overall sector predictions.

# **Acknowledgements**

Written by Martin Cottingham (independent researcher, writer and editor), with Soil Association staff Emma Rose, Jim Twine, Finn Cottle and Tim Perrett.

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#### The organic consumer

Main research, data and insights – Kantar Worldpanel (Steve Reid and Rhiannon Sweeney). Additional material from Leapfrog Research/Organic UK.

#### The UK organic market

Multiple retail and product category data/insights mainly from Kantar Worldpanel. Non-multiple retail data mainly from Soil Association research. Information for individual multiple retailers from

Michelle Bates (Tesco), Ian Burgess and Will Ingham (Co-operative), Malcolm Copland (Marks and Spencer), Philippa Hadfield (Morrisons), Will May (Sainsbury's) and James Morrison (Waitrose). Additional input received on independent retail – Ted Bell (Abel & Cole), Lawrence Hene (Ocado); catering – Mike Bond (Soil Association) and Warren Anderson (McDonald's); health and beauty – Steve Ebsworth (Soil Association Certification Ltd), Sarah Eades and Christian Bennett (Neals Yard Remedies), Abi Weeds (Essential Care); textiles – Lee Holdstock (Soil Association), Georgina Thomas (Soil Association Certification Ltd), Susie Hewson (Natracare), Mariusz Stochaj (Continental Clothing).

# Organic farming in the UK

Land area and conversion – Defra statistics; arable – Andrew Trump (Organic Arable); horticulture – Ben Raskin (Soil Association); beef and sheep – Bob Kennard (Graig Producers); pork – Tim Finney (Eastbrook Organic Meats); poultry – Tim Perrett (Soil Association); eggs – John Sayer (Stonegate), Finn Cottle (Soil Association); milk – Huw Bowles (Organic Milk Suppliers' Co-operative); aquaculture – Alex Macinnes (Aquascot); national trends – England: Tim Perrett (Soil Association), Northern Ireland: Albert Johnston (CAFRE), Scotland – David Michie (Scottish Agricultural College), Wales – Sue Fowler (Organic Centre Wales).

# **Looking forward**

Input from Finn Cottle, Peter Melchett and James Twine (Soil Association), drawing upon Soil Association survey returns from multiple and independent retailers and over half of the 'top 100' licensees of Soil Association Certification Ltd.

## **Other Soil Association input**

Helen Browning, Molly Conisbee, Rob Sexton.