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SPECIALITY FOOD
MAGAZINE

BIOFACH2020
into organic

THE ORGANIC REPORT 2019

OPPORTUNITIES ● BEHIND THE SCENES ● THE FUTURE



PLANET & PEOPLE



It feels only natural to be talking about organic in 2019. Environmental concerns are rife,

and consumer demands are putting the world to rights.

The current swathe of bad news has led to good: it seems nearly everyone is making an effort to lessen their impact on our planet, with knowledge being shared, new practices being rolled out and changes being made.

That's not to say that everyone is on board and the organic mission is complete. More education is needed regarding the credentials of organic, if and why it's worth the investment

– for both grassroots production and shoppers' wallets – and help, financial or otherwise, must be rolled out to those struggling to keep up with our world's needs.

It's important in this sea of negativity to remember that there are things we can do to help our planet and its people – that all is not lost (if we act now, that is).

And so, I present our Organic Report 2019. The Speciality Food team, alongside BIOFACH, has gathered information and expert opinion to form a comprehensive overview of the organic market in the UK and beyond.

I hope you find it a useful and insightful read.

HOLLY SHACKLETON | EDITOR

ORGANIC SALES STOOD AT £2.2BN IN 2018, DEMONSTRATING A GROWTH OF 5.3%

SOURCE: SOIL ASSOCIATION ORGANIC MARKET REPORT 2019

THE WORLD'S LEADING TRADE FAIR FOR ORGANIC FOOD

"What's in store for visitors from the retail and catering

BIOFACH2020
into organic

segments and the entire supply chain? It's quite simple: diversity, internationality and inspiration. Or in other words, a 360-degree overview of the organic sector.

"Without doubt, BIOFACH is the No. 1 venue for an unrivalled product range – thanks to the around 3,500 exhibitors expected at the world-leading fair in 2020 – as well as impressive innovations, a wealth of inspiration in food and other products, plenty of opportunities for networking and high-level professional dialogue.

"The numerous highlights in 2020 are sure to include the congress theme "Organic delivers!", which will look at how doing business in an environmentally friendly way impacts positively on the climate, water, soil, biodiversity, the basic conditions of human life, the common good and human health. Also celebrating its premiere is the network hub and special show on a highly topical issue 'All about water – is the basis of all life endangered?'

"Generally within the industry we are seeing the growing importance of the organic system not just on the retail side but also in the catering and restaurant segments – and you can experience all this and more at the world's leading fair for organic food. We are looking forward to seeing you at BIOFACH 2020 in Nuremberg!"

DANILA BRUNNER, DIRECTOR OF BIOFACH AND VIVANESS

NEED TO KNOW

WHAT: BIOFACH

WHERE: Nuremberg, Germany

WHEN: 12th-15th February 2020

WEB: biofach.de/en

TWITTER: @BioFachVivaness

"Organic has been recognised as an EU 'Quality Mark' because it delivers so much on environmental and social objectives, and ultimately helps consumers to understand and address the many complex issues and choices they face in making changes to a lifestyle that has a positive impact on the environment, soil health, land use and biodiversity"

PAUL MOORE, DIRECTOR, ORGANIC TRADE BOARD



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SELLING ORGANIC

- What does 'organic' mean to consumers?
- What's selling (and what's not)?
- The role of independents

WHAT DO CONSUMERS ACTUALLY WANT?

"The organic food and drink market is growing across the globe," says Mike Hughes, head of research and insight at FMCG Gurus. "Linked to the clean-label movement, this is being driven by consumers wanting maximum reassurance that the products they buy contain only real and authentic ingredients and are free from chemicals. Indeed, a Q1 2019 survey of 25,000 consumers across 25 countries by FMCG Gurus shows that 73% of consumers believe it is important that food and drink is 100% natural. The research shows that natural claims and organic claims are interlinked. For instance, a total of 44% of consumers associate natural food and drink products with being organic."

"In my opinion the growth in sales is down to the increase in conscious consumption," says Ros Heathcote, founder of Borough Broth. "Certification represents a level of trust and traceability that is reassuring to many consumers, myself included." "Customers are demanding organic because there's an increased awareness of the benefit of naturally produced food," adds food consultant and nutritionist Catherine Blackmore. "Consumer mistrust from food scandals strengthens the view that organic has a stricter stance on animal welfare, biodiversity and independent checks and controls."

"40% of respondents said they had only started buying organic in the last two years"

SOURCE: KANTAR MILLWARD BROWN ORGANIC TRADE BOARD STUDY: 2,000 RESPONDENTS OCTOBER 2018

85% OF HOUSEHOLDS ARE BUYING ORGANIC – 1.4M MORE THAN 2014



WITH **40%** BUYING ONCE A MONTH OR MORE

12% OF ONLINE GROCERY SALES ARE FOR ORGANIC PRODUCTS



Source: Soil Association

WHAT'S SELLING?



WINNERS

THE BIGGEST SECTOR FOR ORGANIC IS DAIRY – **54%** OF HOUSEHOLDS IN THE UK PURCHASE ORGANIC DAIRY PRODUCTS. THE SECTOR IS CURRENTLY WORTH **£339M** AND IS GROWING **2.3%** YEAR-ON-YEAR (YOY)

50% OF BRITISH HOUSEHOLDS PURCHASE AMBIENT FOOD AND DRINK PRODUCTS, GIVING THE SECTOR A VALUE OF **£294M**. AMBIENT ORGANIC FOOD AND DRINK IS GROWING IN SALES BY **5.3%** EACH YOY

64% OF UK CONSUMERS BUY ORGANIC FRUIT AND VEGETABLES. THE MARKET IS EXPERIENCING **0.5%** YOY GROWTH AND IS CURRENTLY VALUED AT **£267M**



LOSERS

ORGANIC MEAT, FISH AND POULTRY ISN'T AS SUCCESSFUL, SEEING A **14.5%** LOSS YOY. **6.3%** OF BRITISH SHOPPERS CHOOSE ORGANIC OVER CONVENTIONAL IN THIS CATEGORY

Nuremberg, Germany
12-15.2.2020

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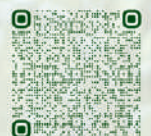


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HOME...

- The challenges and joys of organic production
- Innovative approaches to organic farming
- Does organic always mean healthy?

THE ORGANIC FARMER

Richard Hollingbery, Godminster



There are many challenges with organic farming, though we feel that the greatest challenge has been learning to manage the balance of fertility within the crop rotations. After 20 years of trials we currently operate a five-year inner rotation (to which the cattle can walk from the dairy) and an eight-year outer rotation.

We have learnt to decrease the weed burdens that we endure as organic farmers, mostly through timely and shallow cultivations as well as making composts properly, which has the effect of burning out the weed seeds.

The greatest benefit we have witnessed is that of a more balanced eco system and this means healthier cows, cleaner water, healthier soil, more diverse cropping, increases in insects and birds, and 25 acres of healthy and growing broad leaf and CO2 consuming trees.

We clearly add value as an organic business, but it costs more to look after the environment as though it's a system – and we will all see the benefits of this in the long term.

“Nature repays those who treat her kindly”

\$323BN

PROJECTED VALUE OF
WORLDWIDE MARKET
BY 2024



Source: DIT

25%

GROWTH
IN EXPORT
SALES FOR UK
BUSINESSES



Source: Soil Association

SOIL ASSOCIATION: "INDIES
ARE AT THE FOREFRONT"

"Independent retailers have been at the forefront of many of the recent successes in the organic market, with 6.2% growth in 2018 – almost 3% more than supermarkets," says Alison Muirhead, business development manager at Soil Association Certification.

"Independent stores give their customers a high level of specialist knowledge and hands-on experience that larger retailers can only hope to match, while organic offers a level of trustworthiness not seen in other production methods. This combination, when done right, has the potential to encourage more and more people through independent retailers' doors. As more shoppers seek out options with a lower impact on the environment, as well as returning to more locally-produced, low waste and unusual options, the opportunities for independents who value their customers' needs and offer expert advice on organic continue to grow."

"MATTER OF PRINCIPLE"

The additional complexities of growing organic ingredients means a dearth of organic suppliers. And this is one of the reasons that "organic ingredients cost between 10 and 30% more than non-organic ingredients which will of course affect the bottom line," explains Catherine Blackmore, food consultant and nutritionist.

Ros Heathcote, founder of Borough Broth agrees: "The hardest part is finding organic suppliers; when producing non-organic products there are far more ingredients available to you."

"Having an organic sticker on your product seems to be converting into greater sales, but many producers claim that their decision to go organic is not all about the money – ethics come into play too," says Jason Gibb, founder of Planet Jason and Bread & Jam. The business decisions of Cecily Mills, founder of Coconuts Organic, are led by her personal choices: "I buy organic food for me and my family, so as a matter of principle there was never any question that my food product wouldn't be organic."

When it comes to the future of organic within the UK's food and drink industry, Jason believes that "The relationships that start-ups forge with their suppliers play their part in the decision to go organic". "What sets start-ups apart from larger corporations is the close connection to the supply chain," explains Ros. "When a new brand is sourcing and processing ingredients there are fewer degrees of separation that sometimes long established, large entities can put in place. This connection drives transparency and encourages organic certification."

"DIT OFFERS A RANGE
OF SUPPORT TO
HELP UK BUSINESSES
IDENTIFY AND
ACCESS NEW
MARKETS OVERSEAS"

SUE BISHOP,
DEPARTMENT FOR INTERNATIONAL TRADE (DIT)

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A BALANCED APPROACH



Parallel production is always harder to achieve but Tregothnan has evolved its own 675-year-old farming system. There are significant challenges with long-term woody crop establishment in the lush Tregothnan microclimate where weed control in the early years in a novel crop is problematic. There isn't

a body of research to draw on to deliver effective organic growing on novel crops such as tea and a balance with known conventional practices was best.

Establishment with some conventional inputs is definitely better for weed control in the first four years of the crop, nothing is harvested until year six so there is plenty of time to convert to organics. A well-managed tea bush could live for over 400 years so it is worth spending time getting this right.

Chemical companies want you to use more product, and our own experiments have proved that actually very little is required to achieve the required results, in most cases. On the other hand, organic associations can become inflexible and dogmatic, stifling the development of exciting and sustainable new crops.

Jonathon Jones, MD of trading at Tregothnan

FROM THE GROUND UP

Growing demand for organic – and a public which is increasingly recognising its benefits for planet and self – is certainly a positive thing, but that's not to say that organic-focused industry players are home and dry; the creditation comes with its own, complex, set of issues. Thankfully, there's a contingent of growers and producers willing to fight the fight.

"Access to labour and a changing climate are the two biggest challenges faced by our network of organic growers," explains Dale Robinson, head of procurement at Riverford Organic Farmers. "Organic growing is an extremely manual job, most of the weeding is done by hand or through manually-operated machinery, which is expensive and time consuming. It's by far the biggest cost faced by organic growers. Another challenge our growers in particular face is finding the balance between varieties that have a good disease resistance, which also taste great. We grow for flavour, not just yield, so we're not always going for the most agreeable varieties."

The natural world, the very entity being fought for by organic growers, is causing issues too: "We are seeing more extreme changes in weather, and it's the peaks and troughs that you can't predict that can wipe out an entire crop."

PERI EAGLETON,
SEGGIANO

"Pros and cons"

Organic certification guarantees the land where agricultural ingredients are cultivated is free from harmful pesticide or insecticide use and that any possible cross-contamination from contact with conventionally farmed produce is eliminated during processing, transportation and storage. The scope of organic certification checks also extends to sustainable farming methods, social responsibility and humane treatment of animals, which benefit from eating only GM free organic feed.

Organic certification can mean improved provenance traceability within short supply chains, but doesn't always equate with authentic quality and provenance. For instance, an organic industrial extra virgin olive oil can carry the organic denomination as long as proper traceability records are maintained, even though the oil could be a mix from multiple suppliers and have passed through many hands.

The downside of organic certification is that on average it adds about 20% to the base cost of a product, which significantly increases the final price to the consumer. The increased costs are associated with a percentage decrease in production volume as crops are more vulnerable, together with the costs of certification controls.

When making brand selections, one has to seriously evaluate which

products it's worthwhile certifying.

Take artichokes, which are basically fleshy edible thistles, aren't of much interest to pests and don't get sprayed; it doesn't make much sense to add the organic price premium on to the already high cost of hand trimmed artichoke hearts.

When it comes to a product like pasta though, the organic issue is more acutely relevant, since wheat is often grown on glyphosate treated land. The crop can also be subjected to chemical sprays and the grain may be treated with insect repellent during storage, whereas organic grain would be stored in refrigerated or atmospherically controlled conditions. Although much of the residual chemical is eliminated through husking the grain, some harmful residue survives cooking to enter the human digestive tract and worryingly, studies show the presence of glyphosate in human breast milk.

These unpleasant facts are not evidenced on packaging and, ironically, consumers who choose wholegrain and wholemeal pasta or bread options for health reasons, will be exposed to higher levels of chemical toxicity if the products are not organic, because more of the husk remains. This thinking informed the choice for wheat and gluten free Seggiano pasta ranges to be organic.

Peri Eagleton is the co-founder of Seggiano.

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Under the patronage of IFOAM – Organics International, BIOFACH guarantees the constant high quality of exhibits through strict admission criteria at all BIOFACH exhibitions worldwide. All exhibits are certified to the accreditation directives of the IFOAM Family of Standards, which contains all standards officially endorsed as organic by the organic movement. The leading exhibitions in the BIOFACH World connect raw material marketplaces with international demand in 7 flourishing economic regions of the world – and promote the development of regional markets at the same time.

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& AWAY

- International opportunities
- Successful organic markets overseas
- What European markets can teach the UK

“Denmark has the highest organic market share in the world: 13.3% of total food sales”

SUE BISHOP, DEPUTY DIRECTOR OF CREATIVE, LIFESTYLE AND LEARNING AT THE DEPARTMENT FOR INTERNATIONAL TRADE (DIT)



“On a global scale, the organic market is expected to grow from \$124.76 billion to \$323 billion by 2024, presenting the perfect opportunity for UK producers to capitalise”

SUE BISHOP, DEPUTY DIRECTOR OF CREATIVE, LIFESTYLE AND LEARNING AT THE DEPARTMENT FOR INTERNATIONAL TRADE (DIT)

Categories such as soft drinks which have seen troubling headwinds due to issues around sugar, have found that implementing organic options has been a way to mitigate against a reduction in sales and create growth. And, although the healthy eating trend is present in markets across the globe, western European countries and North America have significant opportunities for UK producers to tap into.

In the Netherlands, for example, organic sales were up 8% in current value terms reaching a total of €679 million in 2018, with organic baby food being the highest growth product range in organic packaged food. Organic cooking sauces are also in high demand, with Dutch consumers favouring Asian varieties as they look to make this food at home.

Denmark has a strong organic market with an impressive 13.3% of total food sales, which is the highest market share in the world. According to Organic Denmark, more than half of Danes buy organic food every week which presents Denmark as another potential market for UK organic produce to be well received.

US consumers are increasingly looking towards small UK SMEs for organic produce and innovative offerings. Organic dairy produce is seeing the most growth in the United States, especially in categories outside of organic milk such as cheese and butter. Organic ready meals are also showing a strong growth potential in the market, and with a low base of existing brands there is plenty of room for UK producers.

Source: Department for International Trade

AROUND **40%**
 OF **ORGANIC**
 SALES ARE
 CONCENTRATED
 IN THE **EU**
 MARKETS"

DAVID GILGUR,
 HEAD OF VIMES CONSULTING



"We know that the UK organic sector under-performs on export. At the same time, businesses in our sector who do export are seeing impressive growth. Our last export survey revealed that of those businesses who do export, more than a quarter reported more than 25% growth in export sales. With growing distrust of food being a global trend, there is huge interest in independently certified, high-integrity, sustainable, high-quality food and drink from Britain. Soil Association Certification remains keen to support our licensees access overseas markets and help build the international reputation of products which meet our standards"

LEE HOLDSTOCK, SENIOR BUSINESS AND TRADE DEVELOPMENT MANAGER AT SOIL ASSOCIATION CERTIFICATION

SPOTLIGHT ON: EUROPE

DENMARK

Source: The Organic Trade Board

The Danish model is simple with one organic logo and one government-controlled certifier, and government subsidies in place to support producers, foodservice and retailers.

The competition to attract organic consumers to store, who care about food values and environmental issues is intense between retailers and this helps drive it forward. The most notable thing that strikes visitors to Danish retailers is the clear messaging in store regarding organic and how it is helping retailers achieve their sustainability goals.

FRANCE

Source: The Organic Trade Board

In France there are two distinct shopping channels of significant market size – the natural foods channel and the grocery channels, and competition to attract the organic and environmentally conscious consumer is fierce. As a result, organic foods have become an important way of attracting high value organic shoppers who are prepared to support environmentally friendly product offers such as organic. Both channels are overt

in their messaging and support or organic.

GERMANY

Source: Bund Ökologische Lebensmittelwirtschaft (BÖLW – the German Association of Organic Farmers, Food Processors and Retailers)

"In Germany in 2018 almost five farmers per day converted their farm to organic agriculture," stated BÖLW director Peter Röhrig stated at the most recent BIOFACH event. "Also on the new organic acreage, the equivalent of more than 150,000 football pitches are organic farms scoring points for the protection of soil, water, animals and the climate." This equates to 8.9% of the total agricultural land in Germany being cultivated by organic farmers. "[In 2018] Customers invested nearly €11 billion in organic food and supported the transformation towards an agriculture and diet considerate of future generations," stated Germany's The Working Group Organic Market.

OVER 50% OF DANISH SHOPPERS ARE BUYING ORGANIC ONCE A WEEK



"Most British firms underestimate the weight that Made in the UK Organic carries around the globe. While the usual alternative markets suspects tend to be Asia and North America, we would like to throw a new player into this mix – Eastern Europe. Geographical proximity, relatively undeveloped local organic manufacturing, fast-growing consumer interest in the wellness segment, and absolute fascination with 'Made in the UK' make these markets at the very least worth exploring. Made in the UK is automatically associated with what brands from the other countries spend millions to achieve: trust, quality, tradition"

DAVID GILGUR, HEAD OF VIMES CONSULTING

RENÉE ELLIOT



"Organic, then and now"

When I first arrived in England in 1986, I didn't notice organic foods. Organic wasn't really on my radar, the political agenda or in the public arena. Sales of the UK organic food market the following year were valued at about £30 million, so organic was around, but certainly had not hit the mainstream. At that time, America was farther ahead with retailers like Bread & Circus, Wild Oats, Erewhon and Wholefoods operating from large format stores across the country.

Almost a decade later in 1995 when I opened Planet Organic, organic remained little known and food products in England were full of E numbers, hydrogenated fat, refined sugar and all sorts of artificial additives and preservatives. One of my goals was to bring organic into the mainstream alongside the efforts of organic farmers, growers, manufacturers, retailers and NGOs. There was much less awareness about food, health and ingredients. And raising awareness, which was essential to promote organic, was challenging.

Food scares were great for organic sales, because they woke people up and encouraged them to learn and then to change. Remember that although this was at the time of commercialisation of the Internet, it was still early days. Organic hit the mainstream in early 2000 in the face of GMOs arriving in England.

This year, the organic market is valued at £2.33 billion, but remains a small percentage of the overall grocery market. Happily, though, organic foods have been joined by a range of healthy eating diets and trends that appeal to different customers. I'm encouraged that these trends such as free-from, plant-based, raw and others take consumers on a better eating journey.

My preference would be that these and future trends are based on organic and whole foods, but I'll cheer for anything that gets people eating better. There is still so much to do to raise awareness about health and wellbeing in order to push better eating up people's priorities. It's an on-going journey. I remain absolutely committed to organic because it is the most thoughtful, responsible and smart way to farm, live and eat.

Renée Elliott is the founder of Planet Organic and co-founder of Beluga Bean

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THE ORGANIC SHOPPER

- Why do shoppers choose organic? ● What demographic is buying organic? ● Organic and health go hand-in-hand

Retailer insight

Kellie Bubble, Unicorn Grocery



We aim to work towards a more just food system, a hugely challenging task. Justice for the planet and those who inhabit it includes making good decisions around organic, Fairtrade and local. These are not the values of privilege, they are practical steps that aim to improve conditions and for the working poor around the world and the environment in which we all live. They are the values of the many not the few.

We tend to focus on seasonality and the conditions for the growers, we also try to build understanding on how important it is that we look after the soil. We need the healthy soil, insects and worms, and we need to feed the fertility not just take from it.



“Many consumers are starting to see past the marketing that made organic look like a premium product rather than the natural, simple product it is”

“Among 18 to 25 year-olds, the biggest influence to switching to an organic option is the environment”

WHY DO SHOPPERS BUY ORGANIC?

49% WILLING TO PAY MORE FOR ENVIRONMENTALLY FRIENDLY PRODUCTS

Source: The Organic Trade Board
Feed Your Happy research



61% WILLING TO MAKE LIFESTYLE COMPROMISES TO BENEFIT THE ENVIRONMENT



DO CONSUMERS UNDERSTAND ORGANIC?



“The growing popularity of organic claims can also be linked to increased consumers feeling more aware about what such products are,” says Mike Hughes, head of research and insight at FMCG Gurus. “A total of 65% of respondents say that they understand what an organic product is, whilst 61% believe that food and drink can be 100% organic. When questioned what makes a product organic, a total of 42% say all the ingredients must be organic, whilst 40% say most of the ingredients, 11% one of the ingredients and the rest being unsure. However, when promoting organic claims, it is crucial that links in marketing and packaging promotion are made to natural formulation. After all, when questioned what claims they prefer, 58% said natural claims compared to 26% who said organic (the rest of respondents being unsure).”

Based on a consumer survey of 25,000 respondents conducted in Q1 2019

BRITISH STORES ARE MISSING OUT

Paul Moore, director of the Organic Trade Board



“In the UK, the market is largely determined by the activities of a few retailers who largely determine availability to organic products. While physical availability of organic foods in the UK has improved over the years, mental and visible availability has not, with British stores largely avoiding any overt messaging or signposting in support of organic. With the change to environmental consumerism, there is much to gain for British retailers in promoting an organic message and offer for their customers.”

36% OF 18-39 YEAR-OLDS TRY AND BUY ORGANIC WHENEVER THEY CAN VS 27% OF TOTAL RESPONDENTS

SOURCE: KANTAR MILLWARD BROWN ORGANIC TRADE BOARD STUDY: 2,000 RESPONDENTS OCTOBER 2018



“We know that 1/3 of all food purchasing decisions are now based on health. And we see the ongoing growth of organic as part of that general consumer interest in nutrition and wellbeing. For example, the majority of baby food purchased in the UK is organic, which seems to show consumers inherently believe organic is best, the right thing to feed their children”

AL OVERTON, PLANET ORGANIC

THE FUTURE OF ORGANIC

- What's next: industry opinion ● What to stock
- Viewpoints: start-ups and retailers



The start-up view

Jason Gibb, founder of Planet Jason and co-founder of Bread & Jam

The higher cost of organic ingredients, manufacturing and certification puts a lot of pressure on the margins, a complaint often heard from start-ups. Fortunately some of the costs can be passed on as "an organic shopper's basket size is more than double the value of someone shopping for non-organic items," according to the Soil Association's Tessa Hart. This is certainly great news for the retailer, who should really be thinking about a bigger organic range to attract these customers.

Ultimately, whether a new food or drink brand decides to be organic or not is a pragmatic decision. As Catherine Blackmore puts it, "in the beginning most food start-ups nearly always want organic certification, but after looking at the higher costs (and lower margins to them), they often opt to think about this further down the line in future product launches or find a happy medium by having a core non-organic range of products with one product being organic."

Whatever the decision, it's clear that organic certification and having an ethical, premium brand go hand in hand. As Trusha Patel, founder of the Spice Sanctuary says, "What's the point in offering high grades of product if they are not grown organically?"

And once you have sourced the organic ingredients and manufactured or processed your product in an organic certified kitchen, you then may need to find a certified packer who is willing to work with start-ups. "There aren't many options for getting products packed as even your packers have to be certified organic - most that are certified organic are larger operators with very high minimum order quantities," laments Dr Susan Thirakornratch, co-founder of One Earth Organics.



"Our commitment to organics extends to our other efforts to prove the concept for sustainable food retail - no plastic bags (for 12 years now), loose fruit and vegetables

since we opened, our industry-first plastic-free home compostable packaging, no food waste policy, renewable energy commitments and other efforts."

AL OVERTON, PLANET ORGANIC

TRENDS: WHAT TO STOCK

FERMENTED AND GUT-FRIENDLY FOODS
(KEFIR, SAUERKRAUT, KOMBUCHA)

VEGAN FOODS
(YEAST FLAKES, TEMPEH, JACKFRUIT)

ENERGY-FOCUSED SNACKS
(CEREAL BARS, PROTEIN BALLS)

SEA VEGETABLES

Source: Soil Association
Organic Market Report 2019



LOOKING FORWARD: THE INDUSTRY TALKS



"Feeding the world is not an agricultural problem, it's a political one. People shouldn't be misled by believing we need to produce more food. The political focus should be on significant revenues lost from discarded food that should be flowing back to farms. Post-Second World War, farmers were sold the message of efficiency and productivity through using chemistry. But are farmers achieving better profits as a result? Farms have certainly become bigger but not because of the economics of production - remove financial support and many farms would not survive."

ROGER KERR, CHIEF EXECUTIVE AT ORGANIC FARMERS & GROWERS



"Working with our partners in Denmark and with our members, we have seen the tangible benefits of co-ordinating effort and messaging across the sector to deliver growth. Our EU and industry funded campaigns have been created to help make organic more accessible and relatable to a wider audience in order to grow consideration of organic as a positive choice, to build penetration across categories and ultimately drive growth in the sector."

PAUL MOORE, DIRECTOR, ORGANIC TRADE BOARD



"Annually the organic dairy industry boasts nearly one third of organic sales, and without wishing to mention the dreaded 'B' word, the price for organic milk availability in the UK is likely to show upwards pressure because currently there are substantial imports of organic milk from the EU - after all a long delay at the border will not be doing fresh milk any good..."

RICHARD HOLLINGBERY, GODMINSTER

Nuremberg, Germany

12-15.2.2020

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