



Organic Market Report

2026



Contents

Foreword	3
Executive summary	4
Market overview	6
Organic consumers	8
Major retail.....	10
Category performance	12
Organic pyramid	14
Independent retail	16
 Scotland Organic Market Report	1-12
Home delivery	17
Foodservice	18
Organic farming	20
Organic beauty and wellbeing	24
Organic textiles.....	26
Global organic	28
The year ahead	30
About Soil Association Certification	31

Get in touch

Soil Association Certification
Spear House, 51 Victoria Street,
Bristol BS1 6AD
0300 330 0100
soilassociation.org

Soil Association Scotland
20 Potterrow, Edinburgh EH8 9BL
0131 370 8150
soilassociationscotland.org

© Soil Association 2026 The reader of this report agrees not to copy, reproduce, extract or transmit in any form, the whole, or part of, the data, materials or information contained in it. Unless otherwise agreed in writing in advance with Soil Association Certification, this report may not be sold, passed on, communicated or disseminated in any form including within its original cover. Soil Association Certification Limited (Company No. 726903) is a wholly owned subsidiary of Soil Association Limited, a registered Charity (Charity No. 206862)



Foreword

Building a fairer, healthier and more resilient food system

Last year we celebrated the sector’s strong bounce-back after a tough time. Now we’re delighted to see both volume and value sales continuing to increase at pace over the past 12 months – with organic consistently out-performing non-organic products.

Two-thirds of consumers intentionally purchase organic and this group is growing. They do this to avoid pesticides, support their health and protect the environment.

They can see how the climate emergency is impacting their lives and want to be part of the solution. But, sadly, the UK government doesn’t seem to share this commitment. In 2025 we saw Labour pause new Sustainable Farming Initiative (SFI) applications. Plus, the new Environmental Improvement Plan threatens to weaken pesticide regulation. That’s despite a stark warning from the government’s own report highlighting the risk of ecosystem collapse to the food chain – and to national security.

This is disastrous news for our environment. Right now we should be doubling down on practical ways to build a positive future for everyone – and we’ll be working closely with organisations who share our values to fight for change.

Challenges and opportunities

Though it’s been another strong year for organic we recognise that business confidence is low due to a tough economic climate. Demand for organic is growing. But the amount of organically-managed land is still lagging well behind.

We were delighted to see Scotland’s Organic Action Plan launch on 27 January this year. It’s truly inspiring to see farmers, government, businesses and non-profits working together to take action. We’ve also seen progress in Wales, through a new £3 million scheme for organic support, including payments for certified organic farmland during 2026.

With Scotland, Wales, the EU and US all strengthening their support for organic, England runs the risk of being left behind. An English Organic Action Plan has to be the natural next step.

Growing evidence shows how organic works for the economy, environment and health. Sustain’s Bridging the Gap report reveals how even modest public investment in organic fruit and veg can deliver huge returns for communities, local economies and climate.

Bringing our community together

It was wonderful to see the organic community come together last year for key moments including the Best of Organic Market Awards (BOOMs) in the summer and the annual Organic Trade Conference in November at London’s Barbican.

We’re committed to continuing our support for the whole UK sector. As part of this, we’ve been gathering insights from stakeholders on how best to support businesses.

What we do starts with certification – but it doesn’t end there. We’re determined to see organic achieve its potential in the UK and grow throughout 2026 and beyond. Thank you for being part of our mission. We recognise that times are challenging. But we also know we’re all part of a movement that’s changing the world – through practical and sustainable solutions that work for everyone.

Dominic Robinson

Chief Executive Officer of Soil Association Certification



Executive summary

Organic continues to grow while consumers shift their buying habits to combat the cost-of-living crisis.

In 2025, the total UK organic food and drink market experienced its fourteenth consecutive year of growth, rising 4.2% to reach £3.9 billion.

Sales variations across key channels outline how the cost-of-living crisis is influencing consumer habits, with shifts to discounters and supermarket loyalty schemes impacting sales in independent retail and home delivery. In major retail, organic volume continues to grow four times faster than non-organic.

- **Value sales in major retail grew 7%***, driven by uplifts in dairy, ambient grocery, fresh produce and meat, fish and poultry.
- Organic food and drink unit sales across major retail continue to grow at **four times the rate of non-organic, with organic unit sales at 1.2%*** while non-organic remained flat at 0.3%.
- **Nearly a quarter (23%)^[1] of supermarket organic purchases are made online**, showing it's a critical channel for shoppers choosing the category.
- **Share of trade in major retail saw shifts** as retailers invest in price promotion, rebranding and different in-store merchandising strategies.
- **All age groups buy organic across Britain**, with shoppers aged 35-44 accounting for a greater proportion of organic spend versus their buyer size^[2].
- **Sales through independent retail fell 1.1%**, with retailers reporting lower volume sales and basket spend as consumers face rising costs in products like chocolate and coffee.
- While home delivery enjoyed a buoyant start to the year, a hot summer saw shopper habits shift, leading to a slight **1% decline in 2025**.

- Hospitality had a mixed year. **Cost-of-living pressures** reduced high street footfall, while Food for Life's success in Scotland demonstrated how public procurement can offer huge opportunities for organic in settings such as schools and hospitals.
- The **beauty and wellbeing sector continues to grow strongly, up 8%**. Rising awareness around forever chemicals and other controversial synthetics is leading to increased customer demand and improving recognition of COSMOS certification among beauty brands.
- **The textiles sector experienced 10% growth** with controversy over toxic chemicals in tampons driving a shift to organic personal care products.
- While England saw a **7% increase in organic land area in conversion in 2024^[3]**, this growth was dramatically slowed by **suspension of the Sustainable Farming Incentive (SFI)** – representing the first break in organic conversion support in 30 years.

Matching consumer demand with on-the-ground support

Organic sales continue to grow. However, the category represents a small part (1.6%) of the overall market. Barriers to growth include a frustrating lack of support for organic farmers, rising business costs, export challenges and inflation continuing to put pressure on both producers and consumers. The launch of an Organic Action Plan in Scotland has strengthened calls for similar support in England. This would give farmers the resources and confidence to invest in farming methods that deliver resilience and drive food security. It would also give businesses the opportunity to expand, innovate and give consumers the access to organic that they increasingly demand.

Sources:

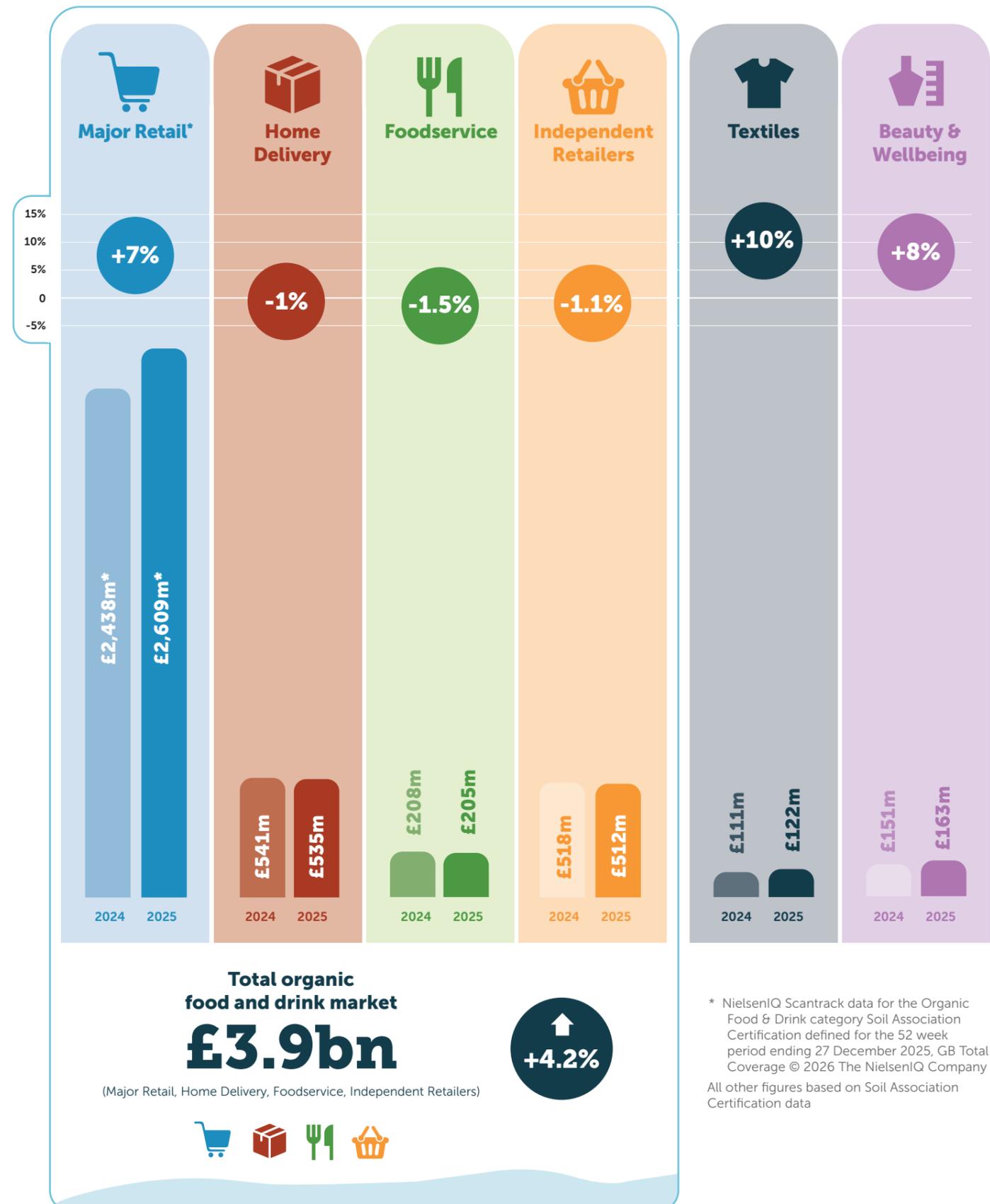
* NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 27th December 2025 GB Total Coverage © 2026 The NielsenIQ Company

[1] NielsenIQ Homescan Organic Food & Drink category Soil Association Certification defined for the period ending 12we 4 October 25 GB Total Coverage © 2026 The NielsenIQ Company

[2] Worldpanel by Numerator, GB Take Home Panel, 52 w/e 30 Nov 2025

[3] DEFRA Organic Farming Statistics United Kingdom 2024

Sales of organic in 2025 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 27 December 2025, GB Total Coverage © 2026 The NielsenIQ Company
All other figures based on Soil Association Certification data

Market overview

As organic delivers its fourteenth year of growth, the opportunities to seize a resilient future are expanding fast.

Figures for 2025 highlight how the UK's consumers are buying more organic food and drink for their family's health as well as the planet's. Their commitment at the check-out lifted the total UK organic market up 4.2% to reach £3.9 billion. Sales of staples like organic milk and eggs are increasingly part of people's everyday shops – while rising stars like tofu, canned pulses and oatmeal, offer convenient protein sources and meet the ongoing home cooking trend.

This move towards organic is re-shaping supermarket shelves, as Aldi, M&S and Ocado in particular buy into the sector's success. The organic opportunity is expanding beyond bricks and mortar stores too. Nearly a quarter of organic sales are made online [1]. And new channels such as social shopping – buying direct through TikTok and Instagram – are set to expand organic's reach even further. Rapid home delivery also offers an accelerated route to organic expansion.

Elsewhere, independents are making organic central to their offer – as retailers evolve with new store formats incorporating to-go food and drinks alongside non-food products. Often this involves organic beauty – providing consumers with self-care moments free from toxic ingredients. Textiles are part of the experience too – both in terms of sustainable fashion and personal care – as new research on toxicity steers shoppers towards organic tampons.

A trusted, proven solution

Keeping up with rising demand means expanding organic production. Scotland's Organic Action Plan shows how government can support the sector to replace imports with homegrown produce in key areas like oats. In England, the potential is there with lines like berries and wine already getting established. The challenge now is for the country to join its sister nation and get behind a clear government-backed roadmap for growth. This is especially vital in a warming climate where both droughts and floods put harvests in doubt – risking the country's food security.

Opportunities for organic don't stop at the UK's borders. The EU, Middle East, America and beyond are all receptive to high-quality organic food and drink. Easing red-tape for Great Britain's exporters will further boost sales abroad as global consumers and policymakers recognise the sector's healthy and sustainable credentials.

All these opportunities are vital to grow the market and get healthy food on more people's plates. But right now the biggest opportunity is organic's role in tackling the climate emergency. The figures show shoppers in the UK want greater accessibility and availability to sustainable buys that will make a difference.

Organic is a trusted, proven solution to help nature recover, improve soils and build climate resilience. It's globally recognised too, with the UN recommending buying organic to help combat the climate emergency.

With clear evidence of its benefits for the environment and local communities, organic can deliver on this planet-friendly promise.

x2
The organic market has doubled in growth in the last 10 years

[1] NielsenIQ Homescan Organic Food & Drink category Soil Association Certification defined for the period ending 12we 4 October 25 GB Total Coverage © 2026 The NielsenIQ Company.

At a glance

Highlights from this organic year



Whole foods & nutrient density becoming embedded trends

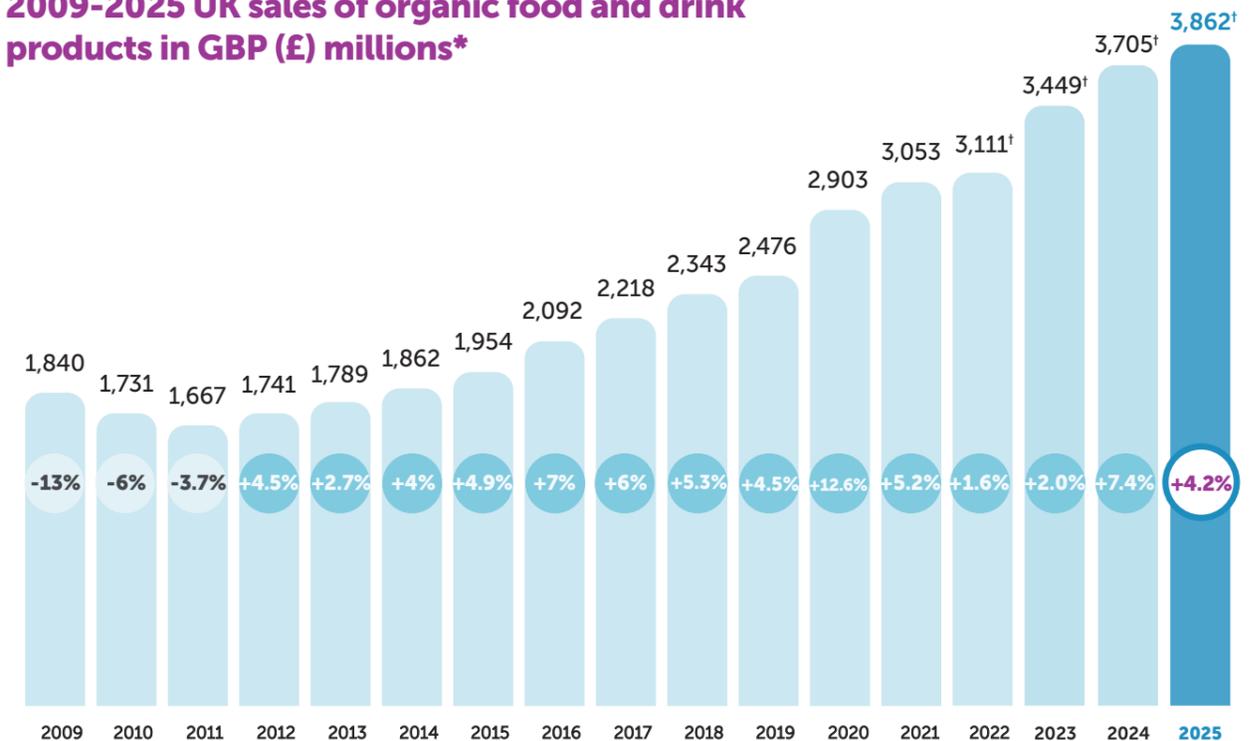


Shoppers prioritising British organic with staples like milk and eggs



Food security & resilience are key in a changing climate

2009-2025 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 2024-2025



Supermarkets **65.8%**[†]
Home delivery **14.6%**^{††}
Foodservice **5.6%**^{††}
Independent retailers **14.0%**^{††}



Supermarkets **67.6%**[†]
Home delivery **13.9%**^{††}
Foodservice **5.3%**^{††}
Independent retailers **13.3%**^{††}

†† Based on Soil Association Certification data





57%
of shoppers
agree organic
foods benefit
health^[3]

Organic consumers

As shoppers scrutinise exactly what goes into their food, organic meets growing consumer trends around health and sustainability.

The organic sector increasingly chimes with contemporary consumer concerns from health to reduced pesticide use and animal welfare. Organic continues to be bought annually by more than 4 in 5 households (83%^[1]), in line with many of the more developed organic markets globally. While shoppers are spending more per trip, they are also shopping more often, with two additional trips vs 2022. Annual frequency of 17.4 is equivalent to shopping once every 3 weeks ^[1].

Further shopper analysis highlights the difference in shopper behaviour within these averages. Half of organic shoppers (42% of households) are responsible for 95% of spend ^[1].

Ultimately, nearly a third of families prefer the family shopper to buy organic products ^[2]. And with new digital channels offering potential for frictionless direct-to-consumer organic access, the category has the potential to supercharge availability in 2026.

Meeting health needs

Shoppers see organic as a positive way to address their growing concerns over health. Research confirms that 57% of shoppers agree organic foods benefit health ^[3]. Plus, 53% claim that 'healthy nutrition' has become more important to them in the last five years ^[4].

Organic shopper insights

Shoppers **aged 35-44** account for a greater proportion of organic spend versus their buyer size.

All age groups buy organic across Britain.

One fifth of organic buyers in Britain are family households, with younger families spending more on organic than non-organic.

Source: Worldpanel by Numerator, GB Take Home Panel, 52 w/e 30 Nov 2025



In 2025 much of this health anxiety is focused on the dangers of ultra-processed food (UPF). With health top of mind for many, it is unsurprising that focus is growing on how food is produced.

Concern about children's diets in particular has inspired the UK-wide ban on high in fat, salt and sugar (HFSS) products being advertised on TV before 9pm, which came into force this year. The government is also proposing a new nutrient profiling model that will see more products, including yogurts and fruit juices, come under HFSS regulation.

Looking ahead, weight loss drugs are also set to shape shoppers' appetites. Today 9% of households in Great Britain currently have a GLP-1 user, which could have an outsized effect on food trends ^[5].

A move towards smaller portions, but maximum nutrition, might energise the healthy snacking market – and fuel the trend towards cooking from scratch.

This dovetails with the functional foods category blending supplements with food. The prevalence of fibre also connects with shoppers' gut health concerns, which continue to be a trending topic.

Changing consumer needs are already shaping supermarket ranges. In 2025, M&S tapped into the anti-UPF trend with its minimally processed Only... Ingredients range and leaned into the needs of GLP-1 users with a new 'nutrient dense' line.

All these sub-trends contribute to the bigger story: shoppers are looking harder at exactly what's in the food they feed their families every day.

Addressing eco concerns

This translates into concern about pesticides on food – as highlighted by PAN UK's 'Dirty Dozen' list of conventionally grown fruits and vegetables featuring the most pesticide residue. Some pesticides, like Chlorpyrifos, are banned in the EU, but still turn up in products imported to the UK.

Awareness is also growing around PFAS – more commonly known as forever chemicals. Last year's hard-hitting Panorama report highlighted to viewers just how often they appear in our water and food supply, despite being linked to health harms including cancer.

Thanks to strict certification, organic speaks to consumers' current concerns. But with focus groups revealing many shoppers are unaware of what makes organic different, ^[6] the potential for positive education is enormous. This is where annual campaigns such as Organic September come in. Last year's gut health experiment with a UK journalist delivered a press reach of over 96 million, demonstrating how organic can speak to these current health concerns.

Organic influencers now have a massive part to play in bridging this communication gap. And with eco-aware Gen Z treating social media as a primary education source, as well as driving new commerce options like social shopping, the chances to inform shoppers are multiplying.

[1] Worldpanel by Numerator, GB Take Home Panel, 52 w/e 25 Jan 2026 Organic penetration & frequency
[4,5] NielsenIQ Homescan Survey November 2024
[2, 3, 6] DEFRA Consumer study on barriers and opportunities for UK and organic foods - Nov 2024

Major retail

In 2025 organic sales through UK supermarkets grew by 7% to reach £2.6 billion ^[1] – with sales made online reaching nearly a quarter. ^[2]

Despite rising inflation and customer caution fuelled by the cost-of-living crisis, major retailers are committed to stocking organic food and drink. As a result, in 2025, organic supermarket sales topped £2.6 billion ^[1].

Figures show how consumers shop organic for their essentials: 55% of all organic sales (by value) come from eggs, milk, yogurt, fresh fruit, fresh veg, salad and baby food ^[1].

Organic retail landscape

On the high street, Waitrose and Sainsbury's both overtrade in organic. Online retail is still proving a popular way to buy into the category, with sales through supermarket online shops reaching almost a quarter (23%) ^[2]. This channel offers shoppers breadth-of-range alongside easy and consistent access to the category.

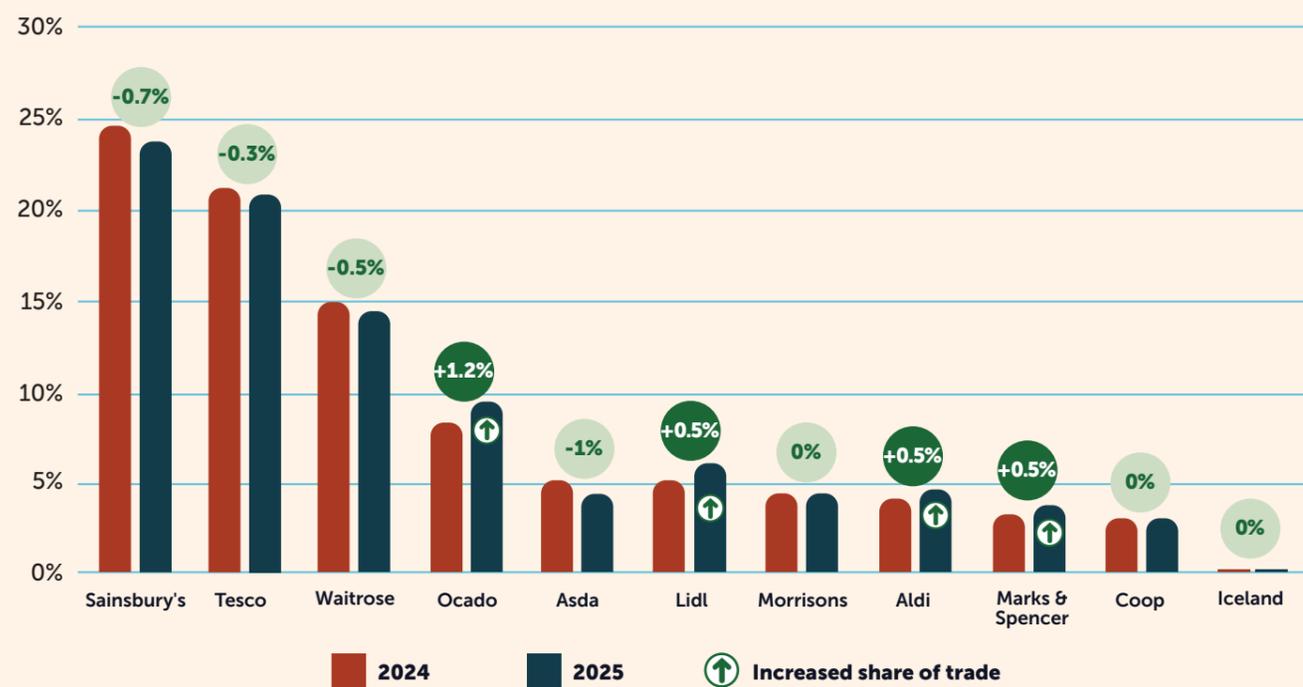
Overall, Ocado gained the biggest share of organic trade for the second-year running (+1.2%) with Aldi, Lidl and M&S following closely behind (+0.5%). M&S is now investing more in organic, with increased ranging, new product launches and engagement in campaigns like Organic September. Meanwhile, Tesco lost 0.3% of organic share while Morrisons held its position ^[3].

Organic innovation

Ocado has over 3,000 organic products available, and has been working hard to boost both the organic supply chain and expand the overall market.

Simon Hinks, Product Director, Ocado, said: "Organic is really important to Ocado and we are working hard to expand choice for our customers. Partnering with the Soil Association is invaluable for Ocado as we work to grow the organic market and support the future of sustainable food production."

Organic share of trade in major retail 2024 Vs 2025



Source: NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Soil Association Certification defined, 52 week period ending 27 December 2025 GB Total Coverage © 2026 The NielsenIQ Company

Organic farming plays a crucial role in farming systems, and as a retailer that over-trades in organic, we recognise the importance of securing a robust and growing pool of organic suppliers."

In 2025, Ocado sponsored the Best of Organic Market (BOOM) Awards. One beneficiary was organic confectionery brand Wild Thingz – winner of the Best of New Organic Food & Drink Products Award and the Ocado Roots Award.

Brand founder Fliss Newland comments, "Our Wild Thingz Ocado listing has significantly strengthened our credibility within the wider confectionery market and winning a BOOM Award reinforces our core values, enhancing our reputation across the organic, natural and health sectors."

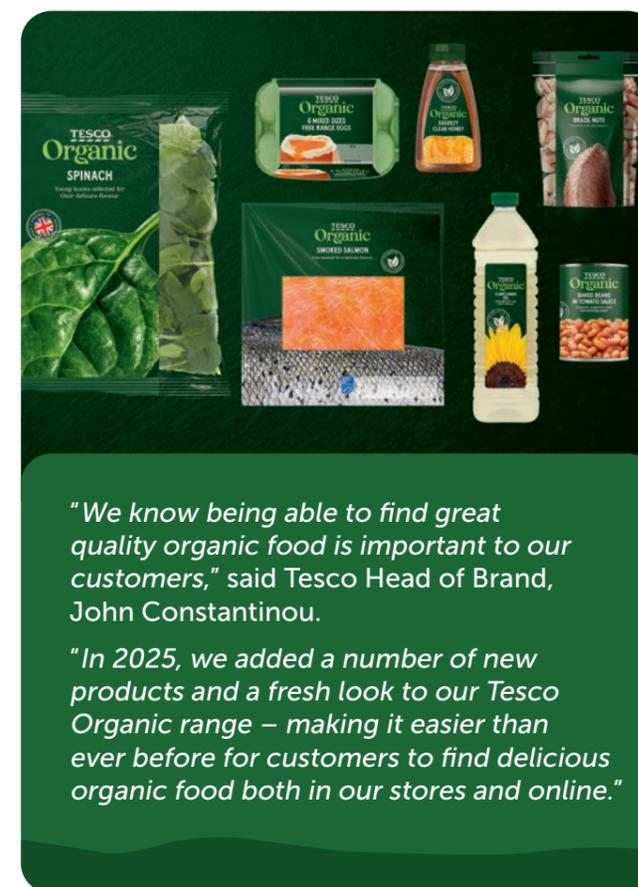
Discounters continue to attract organic shoppers looking for staples – with a combined share of nearly 10% of the organic market ^[3]. This success is helping drive organic forward, with Aldi and Lidl's share of the category increasing year on year. This reflects the overall shopper shift towards value as supermarkets respond with loyalty card promotions. Organic produce is increasingly part of these offers, with 45% of shoppers stating loyalty card promotions influence where they shop ^[4].

Refreshing own-label organic

To meet the demand for high-quality organic products that signal value, major supermarkets have been busy refreshing own-label ranges. In 2025 Tesco relaunched Tesco Organic, specifically citing the fact that demand for organic is growing faster than non-organic.

The range includes everyday lines from ambient food cupboard staples to meat and vegetables.

In 2025, Waitrose relaunched its flagship Duchy Organic range during Organic September, putting renewed energy into merchandising to showcase organic on shelf. The range included 24 new products, and a bold new packaging design across the 250-product-strong collection. This focused activity will likely be reflected in positive results over the coming year.



"We know being able to find great quality organic food is important to our customers," said Tesco Head of Brand, John Constantinou.

"In 2025, we added a number of new products and a fresh look to our Tesco Organic range – making it easier than ever before for customers to find delicious organic food both in our stores and online."

Morrisons held market share by improving availability of organic products in stores. The retailer is doing more in-store to signpost organic too – including increased signage linking organic with health. In 2025, Morrisons launched an online organic shop to help maximise the trend of organic shoppers spending twice as much online compared to total spend on food and drink ^[4].

In the frozen category, organic sales are outperforming the total market with 16.3% growth ^[1]. Organic frozen brand PACK'D launched into more major retailers in 2025, aiming to disrupt the wider category. The brand announced a move into ingredients, launching a new range, including Organic Chopped Garlic and Organic Chopped Ginger, into Ocado. It also released six new fruit and veg lines, like Organic Sweet Potato, into Sainsbury's, plus a Sofrito Mix, signposting the growing opportunity in scratch cooking.

[1] NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 27th December 2025 GB Total Coverage © 2026 The NielsenIQ Company

[2] NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the period ending 27 September 25 GB Total Coverage © 2026 The NielsenIQ Company

[3] NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Soil Association Certification defined, 52 week period ending 27 December 2025 © 2026 The NielsenIQ Company

[4] NielsenIQ State of the Nation Jan 2025

Category performance

In 2025, almost all organic categories enjoyed strong value and unit growth. The only exception was baby food – which is declining across both organic and non-organic in major retailers. Despite this, every organic category outperformed non-organic overall.

Dairy and produce claimed the biggest share of organic sales – accounting for over half (59.9%) of all organic sales by volume through major retailers. These fresh categories continue to be key entry points for organic shoppers seeking natural, minimally processed and healthy options.

Milk and eggs were the main drivers of dairy sales growth with both categories returning over 8% volume uplifts. Meanwhile, bananas, carrots and salad continue to boost sales in produce.

Improving organic accessibility

Strong price promotions and good availability for fresh fruit is driving organic spend in produce. Berries had a particularly strong year with over 20% volume growth. However, organic vegetables have been impacted by inflation and lack of variety in stores.

Overall, dairy, ambient grocery, and meat, fish and poultry saw the largest sales uplifts, with frozen retaining double digit growth year on year. Sales of tofu and tempeh are driving non-meat alternatives as retailers select organic ranges to meet customer demand for sustainable plant-based protein sources.

Sales of staples soar

Staples like canned goods, cereals, home baking and savoury and sweet spreads fuelled a 2.6% volume increase in organic ambient grocery. Elsewhere, organic poultry and fish sales increased significantly – despite poultry in particular being up to three times more expensive – as consumers prioritise animal welfare in their shop. Waitrose introduced their on-pack welfare labelling, highlighting that organic has the highest standards of welfare, making it easier for customers to find the product credentials they are looking for.

In impulse, sales of organic nuts and seeds enjoyed double digit growth, as consumers put more nutrient-dense wholefood snack options on their shopping lists. Canned products, such as pulses, continued to outperform non-organic in value and volume with shoppers choosing organic protein sources and scratch-cook essentials.

In the non-organic aisle, sales of beer, wines and spirits fell in major retailers. In comparison, organic alcohol lines experienced over 6% value growth and 5% volume growth, mainly driven by wine.



“Organic dairy is at a key moment as consumers – especially younger families – look for simpler, more natural choices. We’re delighted to see shoppers choose organic staples like milk, butter and cheese as key entry points, driven by high animal welfare standards, fewer pesticides and a focus on nature. The strong value growth and solid volume gains that we’re seeing in the organic category underscores the need for ongoing support for dairy farmers and resilient organic supply chains to meet families’ rising expectations for natural, nutritious food.”

Verity Richardson
Category Director Organic, Arla

Volume performance by category 2025

Category	% share of organic (units)	% growth (units) YoY
 Fresh Produce	32.6%	+2.3%
 Dairy	27.3%	+5.3%
 Baby Food & Drink	14.3%	-10.8%
 Ambient Grocery	11.3%	+2.6%
 Impulse	5.1%	+0.2%
 Meat, Fish & Poultry	2.6%	+2.9%
 Beers, Wines & Spirits	1.5%	+5%
 Frozen	0.5%	+16.3%

+22%
volume growth
in organic
berries



NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 27th December 2025 GB Total Coverage © 2026 The NielsenIQ Company

Organic pyramid

The organic pyramid shows how organic is shopped in the UK today.

Consumers access the pyramid at its base, with core entry points like tea, carrots, eggs and milk 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 categories. Tofu/tempeh is an excellent example of how organic can dominate a sector – with increased demand for meat-free alternatives produced in a nature-friendly way. Ease of purchase helps shoppers form the habit of buying organic regularly.

The products in this section are largely staple buys for young families, including fresh vegetables and oatmeal. This highlights their desire for trusted brands and certified products at this life stage – as well as growing awareness around pesticide residues in food.

Second step: scratch cook and store cupboard

Home bakers and scratch cooks are information and inspiration hungry. NielsenIQ's State of the Nation report reveals that 60% of shoppers discover new products (and recipes) online – largely through social media*.

60%
of shoppers
discover new
products
online



Third step: elevating the everyday

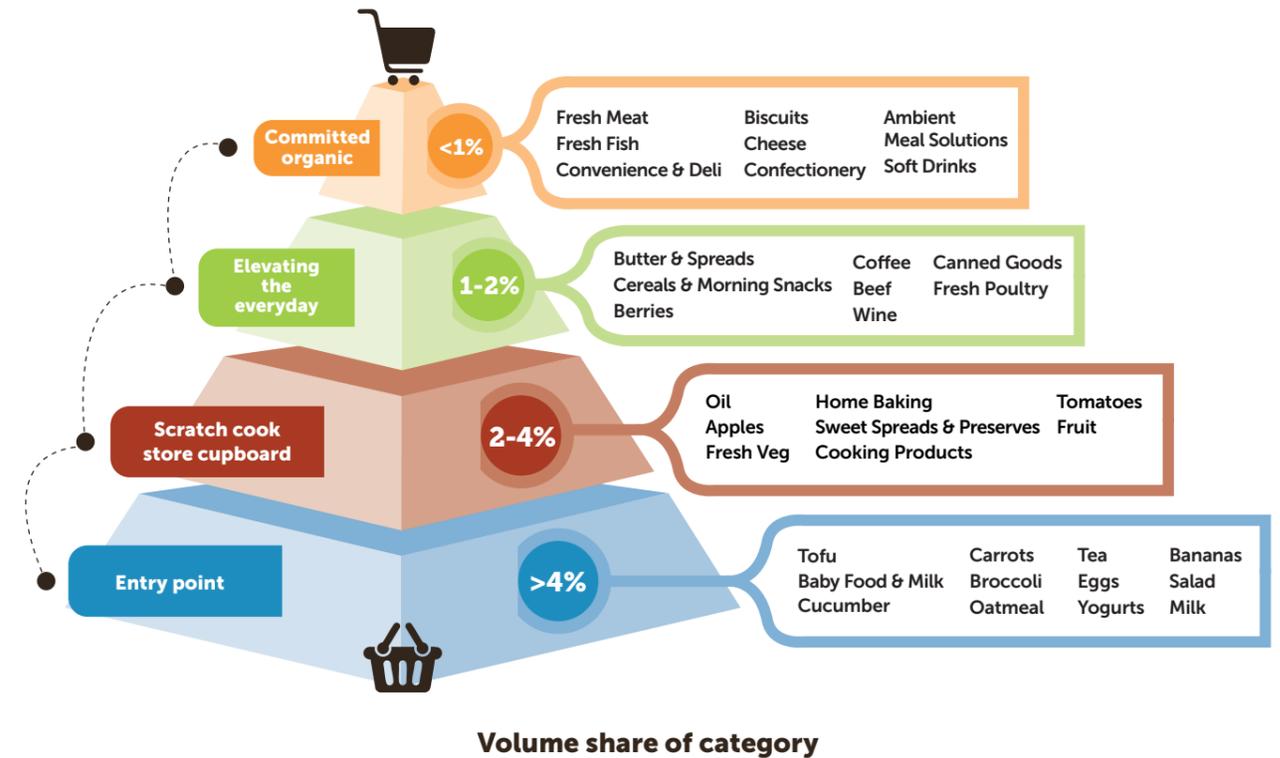
These more committed organic customers are often ambitious cooks, looking for affordable ways to use great quality ingredients. This year, canned goods and fresh poultry have shifted into this category (from step four), reflecting a growing interest in protein rich meals, as well as treats such as wine and coffee. This clearly shows 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.

*NielsenIQ Homescan Survey powered by CAS | March 2025 vs October 2023

Organic pyramid



Source: NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 27 December 2025, GB Total Coverage © 2026 The NielsenIQ Company. Categories chosen with Organic Market value >£27m

Organic innovation

As organic ranges increase in supermarkets, brands are responding to shopper demand with fresh innovation. For example, in 2025 Yeo Valley diversified into meat and ambient categories. This included the brand successfully launching British free-range organic beef-steak burgers into 326 Tesco stores during barbecue season – the move attracted new customers to the category. Yeo Valley plans to release more organic meat in the future.

To follow, the brand introduced organic granola into the ambient aisle to complement its breakfast dairy offer.

Independent retail

Independent retailers experienced a mixed 2025 – including a 1.1% sales drop – as the cost-of-living crisis continued to shape consumer spending.

For many independents, sales felt fairly flat in 2025. Brighton's Infinity Foods noted that the cost of some products, like chocolate, sky-rocketed due to global price hikes. As for many independents, organic is an important part of the store's offer, making up approximately 80% of food lines.

Despite challenges, independent stores feel optimistic about the year ahead. Most (56%) anticipate sales growth while 44% forecast a stable year. Some of this optimism comes from the fact that they see organic as actively aligning with consumer concerns – highlighting strong demand for products shoppers see as healthier or more sustainable. Retailers say this powerful customer connection is their biggest growth factor.

On the shelves, retailers report shoppers are energised by new product launches, increased marketing and targeted organic campaigns.

Returning to roots

London-based independent retailer Planet Organic is optimistic about the year ahead. Managing Director Mark Broomfield stated: "After a transition period, Planet Organic has seen 8 consecutive quarters of positive like-for-like annual growth, finishing its last financial year 7% up. We have seen further like-for-like growth of over 4% in the first half of the 2026 financial year following a successful rebrand and return to the business's founding values, with an expectation of adding to this over the remainder of the year through a refurbishment programme of the older estate."

35%
say cost-of-living pressures are affecting shoppers' buying habits in-store.

Evolving organic stores

In the wider health store sector, Whole Foods Market is set to gain ground with former Amazon Fresh stores reopening under the ethical brand in the capital.

In total, Whole Foods Market's UK store portfolio will grow to 12 outlets across London by 2026 as part of a major shake-up by multinational brand Amazon. Amazon cite careful sourcing from ethical suppliers, plus Whole Foods' shoppers' appreciation for its physical stores, as key reasons for the expansion.

Meanwhile, the independent landscape continues to evolve as organic products find customers beyond traditional health stores. In 2025, trade title Natural Newsdesk noted how research from Health Store Ireland revealed committed health store shoppers' spend was switching to lifestyle grocery and deli outlets.

These locations incorporate organic products (including natural beauty) as a way to tell powerful stories around local sourcing, health and wellness. They may serve food and drink, and double as a venue for talks or workshops, offering a focal point for the community. In particular, this could point to a boom in farm shops which offer healthy products in natural surroundings that shoppers can explore with a coffee in hand.

Whatever the store format, independent retailers are in business to boost much more than the bottom line. In the Organic Market Report Survey they shared pride in their staff, being able to connect with consumers around organic principles and stewarding their environment to benefit the local community. It's factors like these that will help independent stores truly stand out in 2026.

Home delivery

The channel weathered a challenging year with a sales decline of -1% as customer acquisition became harder.

In response to the Organic Market Report Survey, box scheme retailers reported that it's becoming more challenging to recruit new customers. Organic produce increasingly appearing on offer at supermarkets could also be affecting spend.

"Box scheme sales were impacted by the long hot summer last year [in 2025]," said Rob Haward, Managing Director at Riverford Organic Farmers.

"The weather created disruptions and the sales of veg boxes tend to be adversely affected by this. We are optimistic about 2026, having had a strong start to the year."

The sector is adapting to the economic climate with agile business models that can flex rapidly to respond to customer demands and category innovation. Customers are increasingly searching for British organic products, making box schemes a good way to connect with new and smaller British growers.

"We have a loyal customer base who believe in organic farming and what it can achieve for people's health, animal welfare and the environment," says Caroline Dodds, Fresh Produce Buying and Quality Manager at Abel & Cole.

"External factors make it challenging at times but we continue to invest in our UK supply base and have worked with Soil Association Certification this year to onboard a number of new UK growers."

Meanwhile, Scottish box scheme Locavore is planning to build demand by talking about the benefits of its organic offer throughout 2026. Locavore data shows how box scheme shoppers come from across the social spectrum – with 28% of its customers earning a household income of under £30,000.

Fighting ultra-processed food

In 2025, Abel & Cole took a stand against ultra-processed food during Organic September with a one-day billboard ad at London's Leicester Square between two fast food outlets as part of their 'Unprocess your food' campaign.

The bold move aimed to give Londoners a fresh look at what food can be, with no unnecessary artificial processes or ingredients.

Meanwhile, other box scheme providers tell us that while health is still a big reason for shoppers buying organic, over the last year consumer demand has been increasingly driven by eco concerns.

As part of this eco-commitment, Riverford's farm-washing campaign (highlighting how supermarket produce is often from 'fake farms') has gained momentum, with Sustain helping it reach a new audience. In 2025 a proposal for fairer labelling, backed by the campaign, won cross-party support in parliament from 86 MPs.



Growing organic

Growing Good supports local veg box schemes with software that helps scale businesses and offers a more tailored service for customers – making organic produce more accessible for everyone.

Following the company's success last year, in 2025 the brand celebrated a 60% growth in sales, driving nearly half a million veg box purchases. New members in 2026 include Locavore in Glasgow, Oxtan Organics in Worcestershire and Living Larder on the Isle of Wight.

[Growing Good data]



Scotland Foreword

Scotland is leading the way for the whole UK in organic innovation.

A new Organic Action Plan, launched in January 2026, highlights the Scottish Government's long-standing commitment to organic. It's a practical roadmap for growth that benefits the economy while also contributing to net zero, biodiversity and Scotland's international reputation for high-quality food and drink.

The plan was developed by key stakeholders across the sector alongside the Scottish Government, and this spirit of collaboration will fuel delivery, with investment, guidance, research, market intelligence and supply chain support that boosts the sector and unlocks new routes to market for Scottish produce.

The action plan has also enabled, for the first time, publication of a Scottish Organic Market Report, highlighting key areas of opportunity for domestic producers.

A Scottish success story

Scotland's organic sector is driven by consumer demand. The value of the organic market has grown 20.6% in five years*. More recent figures from NielsenIQ show the market in Scotland is now worth £155 million[^], growing nearly 3% in volume sales over the last year. This report also highlights where Scottish producers can step up to meet demand, for vegetables, eggs, dairy, beef and lamb.

Between 2021 and 2024, the area of Scottish agricultural land committed to organic production (either fully organic or in conversion) grew by 27%, with consistent policy support from the Scottish Government alongside an ambitious commitment to double the area of organic land by 2026.

*Worldpanel by Numerator Take Home Purchasing | 52 w/e to 20 April 2025

Five pillars of the Scottish Organic Action Plan 2026-2029

1. Develop Research, Training and Advisory Services
2. Raise Awareness of Organic in Scotland
3. Develop Organic Supply Chains and Markets
4. Facilitate Conversion and Maintenance of Organic Land
5. Promote Public Procurement of Organic Produce

This provides a solid foundation from which to develop the market further, with the government already pledging to continue support for conversion and maintenance through the Agri Environment Climate Scheme (AECS) until at least 2030.

Amanda Brown, Programme Director, Scotland Food & Drink says, "Scotland is leading the UK in organic production, and we're excited to help drive the next stage of growth. More consumers are choosing high quality organic food and drink, and the Scottish Organic Action Plan gives us a clear path to build on that momentum. It sets out practical steps to boost production and strengthen supply chains. We're delighted to play our part in turning this plan into real progress for Scotland's organic sector."



SCOTLAND
FOOD & DRINK



Scotland Market overview

Scottish organic market was worth **£155m** in 2025[^]

Rising sales of eggs, dairy and ambient grocery are boosting the Scottish organic market

In 2025, organic food and drink in Scotland outperformed non-organic – growing 10% in value and 2.9% in volume – despite a modest 1% share of the total Scottish food and drink market. Volume growth was fuelled by strong performances in organic dairy, produce and ambient grocery. Fresh milk (+10%), eggs (+7%), carrots (+2.5%), meat, fish and poultry (+2.2%, growth from poultry coming back onto supermarket shelves) and oats (oat milk, porridge and oatcakes +2% combined) fared particularly well in 2025[^].

There is an opportunity to grow and process more staple organic crops in Scotland, ensuring the economic and environmental benefits stay within the country rather than relying on imports.

Scotland's retail landscape

Scotland's retail landscape differs from the wider UK in organic sales. Tesco overtrades significantly in organic (33% share)** largely due to its dominance in store numbers, compared to other retailers. Growth is driven by retailers' ranging, with Tesco and Sainsbury's consistently stocking core organic lines like milk, eggs and carrots. Strong availability and accessibility boost purchases and expanding these ranges, especially in convenience stores, could further accelerate growth.

Tesco and Sainsbury's are investing in organic via loyalty schemes, with strong results, but shoppers seeking more than the core lines are looking elsewhere.

Volume performance by category 2025[^]

Category	% share of organic (units)	% growth (units) YoY
Dairy	24.6%	+4%
Fresh Produce	19.6%	+3%
Ambient Grocery	13.8%	+4%
Baby Food & Milk	12.4%	-11%
Impulse	4.9%	-3%
Deli & Convenience	3.4%	+11%
Confectionery & Soft Drinks	2.6%	-9%
Meat, Fish & Poultry	2.2%	+55%
Frozen	0.3%	+3%

Waitrose overtrades in Scotland thanks to its broader organic range. While independents, farm shops, box schemes and farmers' markets connect consumers to Scottish provenance and the organic story.

Four key opportunities for retailers

1. Build organic ranges to enable a cross-category organic shop.
2. Stock organic products with Scottish provenance and highlight on pack.
3. Trial different merchandising strategies, like clustering, to engage the Scottish consumer.
4. Highlight occasions like Organic September to drive sales and build understanding.

[^] NielsenIQ Scantrack data for the Organic Food & Drink category Scotland Food & Drink defined for the 52 week period ending 3rd January 2026 Value & Unit Sales Scotland Total Coverage © 2026 The NielsenIQ Company.

** NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Scotland Food & Drink defined for the 52 week period ending 27 Dec 2025 Scotland Total Coverage © 2026 The NielsenIQ Company.

The remaining 16.2% organic share is split across multiple smaller categories

Scotland Meet the organic shopper

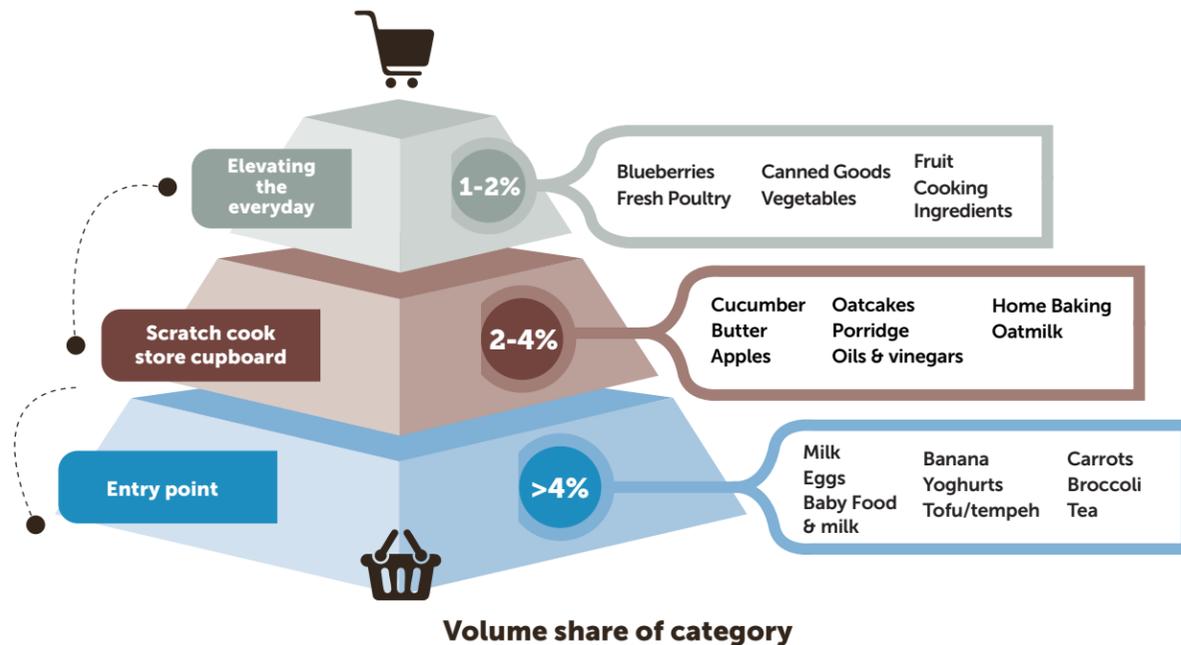
- 35-44 year old shoppers spend the most per buyer on organic.^[1]
- Over half (58%) of spend is coming from more affluent (ABC1) shoppers.^[2]
- 71.8% of Scottish organic volume comes from heavy buyers.^[2]
- People with lower incomes have a higher proportion of organic spend in Scotland, compared to Great Britain.^[1]
- Scottish shoppers are most likely to seek improved availability, more competitive pricing and clearer labelling.^[3]



Both individuals and families are driven by health and wellness considerations for both themselves and their loved ones. Supermarkets' ranging decisions affect shoppers' spending patterns. For example, busy young parents aren't finding a full organic range on-shelf, which leads to them buying non-organic instead.

When looking at Great Britain as a whole, organic is most popular in London and the South East. However, Scotland has experienced the strongest growth in organic engagement, as England's capital declines slightly.^[4] More than half (53%) of Edinburgh stores offer an organic option, lower than in London (72%),^[5] suggesting that increased ranging in Scottish stores would entice more shoppers to buy.

Scottish organic pyramid



Source: NielsenIQ Scantrack data for the Organic Food & Drink category Scotland Food & Drink defined for the 52 week period ending 3rd January 2026 GB Total Coverage © 2026 The NielsenIQ Company. Categories chosen with organic market value >£1m

ORGANIC
produce

GROWN BY US

IN AND AROUND GLASGOW

Customers want Scottish produce

Glasgow-based social enterprise Locavore supplies organic veg boxes to customers from Ayrshire to Edinburgh. The business recently expanded into a new 20-acre site at Barnhill Farm.

Locavore founder Reuben Chesters has seen first-hand the demand for organic food in Scotland – with sales up +8% across the social enterprise's two shops year-on-year.

"We struggle to get hold of enough Scottish-produced organic vegetables [to meet demand]," he says.

"We're also struggling to keep up with demand for Scottish organic eggs – which customers are keen to buy."

Reuben has shown that demand for high-quality organic food isn't solely driven by more affluent shoppers. Locavore's latest social impact report revealed that 28% of its box scheme customers had a household income of less than £30,000 and 28% have an income of over £70,000, demonstrating the breadth of its customer base.

There is a further opportunity to attract the younger customer, as a recent research study showed that 61% of respondents aged 25-44 would be "more likely to buy" a certified organic product.^[6]

As in the rest of the UK, organic supply in Scotland doesn't meet consumer demand – with much recent growth coming from imported food and drink. This presents a clear opportunity for retailers to increase their share of organic trade with smarter ranging and price promotions – two tactics that effectively deliver results.

An opportunity to engage

There's also the chance to drive awareness of organic among Scottish consumers – particularly engaging them with the unique benefits of homegrown organic food and drink.

Scottish consumers really value provenance as a sign of quality and environmental credentials. Retailers can capitalise on shoppers' desire to buy Scottish products, especially those which have organic's additional health and environmental benefits.

As well as increasing shelf presence and tactical use of price promotions, press and social media are proven tools to drive sales. Research from Edinburgh University demonstrated a correlation between positive press coverage (particularly regional coverage) and social media activity on organic with a rise in sales.^[7]

[1] Worldpanel by Numerator – GB Take Home Panel, 52 w/e 30 Nov 2025 %buyer, Organic vs Non-Organic GB & Scotland

[2] Worldpanel by Numerator, GB Take Home Panel, 52 w/e 25 Jan 2026 Organic % buyers by spend, Scotland

[3, 6] Scottish Provenance Research July 2025 56 Degree Insight for The Knowledge Bank

[4] Worldpanel by Numerator, GB Take Home Purchasing | 52 w/e to 20 April 2025 Organic % Share of Food & Drink Spend & 5yr Growth GB vs Scotland vs London

[5] The University of Edinburgh Global Agriculture & Food Systems Report

[7] "Effectiveness of real-world marketing of organic foods and beverages: A systematic review of recent evidence" – Edinburgh University, Aug 2024



Scotland Catering

Supplying organic food to Scotland's public sector; including schools, universities and workplaces, offers more people the chance to enjoy sustainable, nutritious produce every day.

At the 2025 Scottish Organic Gathering, Stuart Aitken, Head of Food for BaxterStorey Scotland, noted that organic stands out for both quality and taste. He added that raising awareness of the benefits of organic among customers is key to building growth in the public sector.

"We have a conversation with our customers – we say we can offer a better-tasting product, sourced from a much better system," he said.

25
certified
caterers across
1,511
sites



"Organic produce is at the heart of what we're driving towards".

Andrew Kennedy, from East Ayrshire Council, agreed that "organic needs to be normalised in public spaces" to see more sector growth.

"Understanding where food comes from is a real strength – one that the organic sector can speak to in terms of its production methods," he said.

He concluded that ultimately getting more organic into the public sector is "about our children's health" – suggesting that policy makers have a responsibility to create change.

Sparkling a food revolution on campus

When General Manager Alan Ratcliffe and his team at BaxterStorey began working toward the Food for Life Served Here certification at Glasgow Caledonian University (GCU), it wasn't just about ticking boxes. They focused on reshaping the culture of food on campus: how it's sourced, cooked and reflects the university's values.

"In a higher education environment, the easy route is volume and speed," Alan explains. "But we saw an opportunity to do something different, to champion craft and creativity, and put local community at the heart of what we do".

Food for Life Served Here is a certification from Soil Association Scotland that recognises healthy, sustainable and Scottish food served up in public and private sector organisations. GCU gained Food for Life Served Here Bronze certification in 2024, highlighting its commitment to good food.

Aiming higher

With the support of BaxterStorey, GCU then set its sights on Silver certification – which rewards a deeper attention to healthy options, Scottish sourcing and requires more organic ingredients.

Achieving Silver meant a shift in how meals were sourced and prepared. Ingredients had to be traceable and responsible: free-range eggs, higher-welfare meat, sustainably sourced fish and local produce like Mossgiel Organic Dairy milk from Ayrshire.

This shift from convenience to conscience required increased spend on organic produce – even at bronze level 75% of meals must be freshly prepared from scratch. No easy challenge in a university setting serving upwards of 220,000 meals a year.

To drive GCU's vision, Alan and his team focused on sourcing smarter. They began using Mungoswells' organic flour in fresh-baked focaccia, blending it with other flours to stretch the budget. Mossgiel Organic Dairy milk became a staple in dishes like mac and cheese. Simple changes, applied creatively, started to add up.

"The response from students and staff has made it all worth it," says Alan. "People care about what they're eating, it's our responsibility to serve food that's good for them and good for the planet."



Food for Life Silver and Gold caterers in Scotland

- Local authorities: Stirling and East Lothian (Silver) and East Ayrshire (Gold)
- Public sector: BaxterStorey Scottish Government workplaces (Silver), BaxterStorey Glasgow Caledonian University (Silver), Heritage Portfolio Royal Botanic Gardens Edinburgh (Silver).

"It's encouraging to see the new NielsenIQ data, which shows volume growth in organic in Scotland out pacing non-organic food and drink. It is clear that organic has growing economic potential. Wholesalers are a crucial link in the chain for the success of the organic market in Scotland, and the Scottish Organic Action Plan offers a real opportunity to maximise the use of Scotland's wholesale networks for Scottish, organic sourcing, supporting Good Food Nation ambitions and strengthening regional economies."

Colin Smith, Chief Executive, Scottish Wholesale Association

Putting more organic peas on plates

The humble pea is helping kick-start an organic food revolution across Scottish kitchens and dining halls.

The Give Peas a Chance! pilot project launched in April 2024, giving pupils at Aberdeen City Council schools the chance to enjoy locally Aberdeenshire-grown organic dried split peas.

It's one of nine innovative pilots from Sustain's Bridging the Gap programme connecting organic growers with the local community. The pilot was so successful that funding has been extended to other councils in Scotland.

"Growing peas is an important part of our crop rotation and helps keep the farm's soils healthy," says Phil Swire, pea producer. "I'm delighted to be able to supply locally grown ingredients into the school meals service, allowing more pupils to give peas a chance!"

At the heart of the project is opening fresh routes to market for this local and organic plant protein, allowing pupils to access healthy and sustainable food. School menus have risen to the occasion by showcasing what peas can add to a plate. Pupils have been trying kitchari rice and even pea cookies and choc-pea brownies – which have been a huge hit.

Embedding through education

The new pea recipes have been accompanied by educational activities to show the pupils the farm-to-fork story of the peas. Royal Highland Education Trust (RHET) has launched a series of educational resources and Royal Northern Countryside Initiative (RNCI) is running classroom talks in select schools.

Impact in Aberdeen City



£1.66

amount recirculated in the Scottish economy for every

£1

spent by the council

Source: Give Peas A Chance! Impact Report, Nov 2025

Credit Matthias Kremer

Going for growth

Diversification and export opportunities are driving sales at Mossgiel Organic Farm in East Ayrshire

Mossgiel Organic Farm has ambitious plans to get even more people buying its award-winning cow-with-calf produced milk.

Founder Bryce Cunningham says that sales grew 10% in 2025. And now the business is going for 30% growth in 2026.

It's planning for expansion through new butter and cheese launches, plus an online shop where consumers can buy products direct. The dairy is also exploring selling to retailers in London (which has the highest concentration of organic shoppers in the UK^[1]) – among other exciting export opportunities.

Currently, half of the dairy's sales go through wholesalers, with the remaining half split between doorstep delivery and sales direct to coffee shops.



"Visiting the coffee shops is one of my favourite parts of the job," says Bryce.

"You can make direct connections with small businesses and get to tell the story of why we're so passionate about organic milk. We like to collaborate with wholesalers so they understand exactly where we're coming from. This helps us reach more niche customers."

Bryce says that animal welfare and trust in organic are the top reasons people choose the farm's products, alongside the eco-appeal of reusable glass. Shoppers actively want more places they can buy Mossgiel – which means expanding into supermarkets without compromising what the brand stands for.

Export excellence

With export opportunities expanding both within the UK and abroad, the organic salmon industry demonstrates how to maximise the value of Scottish provenance. Laura Mailer, Head of Sales at Cooke Scotland says:

"Customers today care about where their food comes from, how it's raised, and its environmental impact. Organic salmon delivers on those expectations through strict welfare standards, lower stocking densities, certified organic feed, and full traceability from farm to fork."

"Despite wider economic pressures, the market for premium, responsibly farmed salmon remains resilient. Our experienced farmers and support teams' commitment to quality and sustainability continues to drive strong export demand in the UK and beyond."



Scotland Farming

Organic farming is surging in Scotland. Defra figures reveal the country achieved a 13% increase in organic farmland in 2024 – topping 131,500 hectares^[1]. The Scottish Government has consistently supported farmers to convert to organic through the Agri Environment Climate Scheme (AECS). More farmers have been able to access this funding since the funding window opened at the end of February 2026.

Momentum driving the sector was evident at Soil Association's sold-out Scottish Organic Gathering, held in Fife in November 2025. At the event David Erskine, Livestock Procurement Manager at ABP Beef, shared how one supermarket was looking to increase organic red meat volume by 20-30% in 2026. With organic beef cattle herds increasing in Scotland, the country is primed to meet this kind of demand.

The market will be accelerated by Scotland's Organic Action Plan – which will support existing organic products and bring new ones to market.

Despite customers seeking out higher welfare meat and retailers looking to increase their volumes of beef and lamb, availability is poor in Scotland. There is an opportunity to serve those Scottish shoppers looking for higher welfare Scottish-reared meat that delivers on environment, health and quality.

On the horticultural side, Bex Goldsmith from RBOrganic Ltd. highlighted the opportunity for vegetable growing in Scotland. Scotland's climate is naturally suited to growing organic root vegetables with guaranteed frosts and cold North Sea breezes. As climate change bites, these kinds of conditions are no longer guaranteed in England.

"Evolving innovation allows us to be smarter with the organic land that we have," she added.

"New advancements in weeding technology, and our experience, have allowed us to increase production, as well as quality – without compromising our soil."

The organic opportunity is also opening doors for Scotland's organic egg producers – like Lower



Scotland is proving to be an organic success story

"We're seeing increased numbers of farmers coming into organic – and 14 years of consecutive growth in the UK's organic market. So it's about capitalising on the opportunity and building on what we already have."

David McKay,
Soil Association Scotland

Mill of Tynet, a family-run mixed organic farm. A six-year supermarket contract for organic eggs has led to a £2.2 million investment in boosting production. The long-term contract helps give the family security driven by demand for organic.

This is particularly good news for Scotland since the nation is a major egg importer. More homegrown eggs help grow the organic market in Scotland and spread the benefits of organic farming locally.

Growing opportunities for Scottish oats

Oats are a much-loved Scottish food. And consumers' appetite for organic oats is increasing – as seen in core products like porridge, oatcakes and oatmilk. They're increasingly being identified by experts as useful for lowering cholesterol and maintaining heart health as consumers turn against ultra-processed food (UPF) for more natural choices produced without pesticides.

Despite the benefits, Scottish organic oats can be surprisingly difficult to find on Scottish supermarket shelves, as customers are frequently met with imported products.

"Scottish organic oats and other arable crops, particularly beans and peas as alternatives to imported soya, represent significant import substitution opportunities. Through supply and value chain development support, SAOS is working with growers to help realise these opportunities as a core pillar of Scotland's Organic Action Plan. We encourage producers, processors and buyers across these value chains to get involved and explore the potential for a more coordinated Scottish supply." Adam Forrest, Co-op Development Manager, SAOS.

Organic growers have highlighted their enthusiasm for working together to meet the market demand. This will mean boosting storage and processing capacity while learning lessons from adjacent categories like pulses and beans.

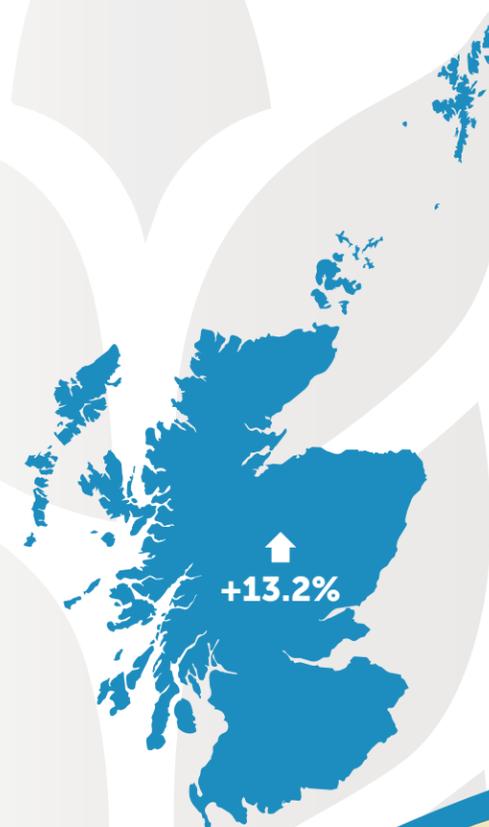
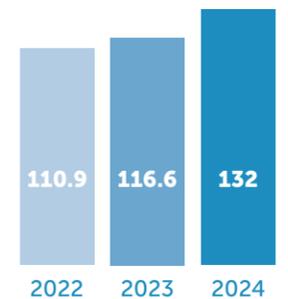
Organic oats have built-in advantages. They tend to have [lower mycotoxin levels](#) due to rotations and crop breaks – a major plus for growers. Investment in production has the potential to increase supply of organic products to Scotland's supermarkets, displacing organic imports and so shifting the wider food system toward sustainability, soil health and biodiversity.

Distribution of organic land and processors/producers (hectares 000s) in 2024

Scotland

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

Processors/Producers: **530 (+1.7%)**



[1] DEFRA Organic Farming Statistics United Kingdom 2024



Scottish Organic Growth Opportunities



Strong market momentum

Organic in Scotland is outperforming non-organic, with solid value and volume growth driven by dairy, eggs, produce and ambient grocery.



Expanding certified land

Organic land is increasing rapidly, supported by long-term government funding and Scotland's Organic Action Plan.



Retail growth opportunities

Broader ranges, better availability (especially in convenience), smarter merchandising and price promotions can unlock demand.



Scottish provenance advantage

Consumers value locally produced organic food, creating opportunities to reduce imports and grow domestic supply. 80% of Scottish shoppers would be "more likely to buy" a product with a Scotland flag on it.



Public sector expansion

Schools, universities and workplaces integrating organic can provide stable and scalable routes to market.



Supply gaps to fill

Shortages in Scottish organic vegetables, eggs and higher-welfare meat present clear opportunities for producers.



Innovation & diversification

New product development, direct-to-consumer sales, wholesale collaboration and export markets offer further growth potential.

www.soilassociation.org/scotland



SCOTLAND
FOOD & DRINK



Foodservice

Food for Life Served Here celebrated 15 years of success in the public sector while Leon is set to welcome organic values back to the High Street.

On the UK High Street hospitality faced an incredibly challenging year as the cost-of-living crisis continued to reduce footfall, resulting in an overall decline of -1.5% across the sector. For operators, rising input costs, National Insurance Contributions and tax increases cut profits and made growth difficult.

According to the latest Hospitality Market Monitor, from CGA by NIQ and AlixPartners, hospitality venues closed at a rate of two a day in the first half of 2025 [1]. This makes the overall sector now 14.2% smaller than in March 2020. Sadly, smaller independent operators suffered the most.

In response, there are growing calls among operators for the government to take action and support the sector. As Kate Nicholls, Chief Executive of UK Hospitality, put it: *"Hospitality is at the heart of our communities and it's essential we do all we can to protect businesses in the sector and the value they bring, from driving economic growth to creating jobs."*

Pubs are particularly affected, with the number of licensed premises in Britain falling 0.4% in the first six months of 2025 [2]. However, the on-trade is finding new ways to stay relevant to sustainably minded consumers.

In 2025, The Bull Inn in Totnes launched a new Level 3 Award in Regenerative and Sustainable Hospitality – the first ever qualification of its kind in the UK. The programme, which is recognised by Ofqual, provides hospitality professionals with the knowledge and skills to harness regenerative and sustainable approaches. Elsewhere on the High Street, Leon co-founder John Vincent bought the better-for-you fast food chain he helped launch, back from Asda, with a promise to return to its core values.

The fact Leon has always majored in organic food, including everyday staples like coffee and croissants, shows how organic can have a core role in signalling health and quality as shoppers move towards sustainable choices in 2026 and beyond.

A record year for Food for Life Served Here

In 2025, the Food for Life Served Here scheme celebrated 15 years of bringing more organic food into schools, hospitals and workplaces. It bucked the wider sector trend with a record year: driving an expected 1.5 million meals in 2025 – a quarter of a million more than in 2024.

Making sure more people can access good food is key to meeting health and sustainability challenges. So, to help push public procurement forward, Soil Association launched Food for Life Supply Chain+ in 2025. The scheme is an innovative collaboration with AgileChain technology designed to drive transparency and impact throughout the food system.

Food for Life Supply Chain+ offers producers a reliable and fair route to market and caterers a more resilient, efficient and transparent approach to procuring sustainable and nutritious food. This helps organic farmers and growers win public sector contracts, no matter what their size or how much food they produce. Meanwhile, caterers and food procurers can source from sustainable local producers and suppliers, including organic and agroecological farms.



Organic sales growth
+24%

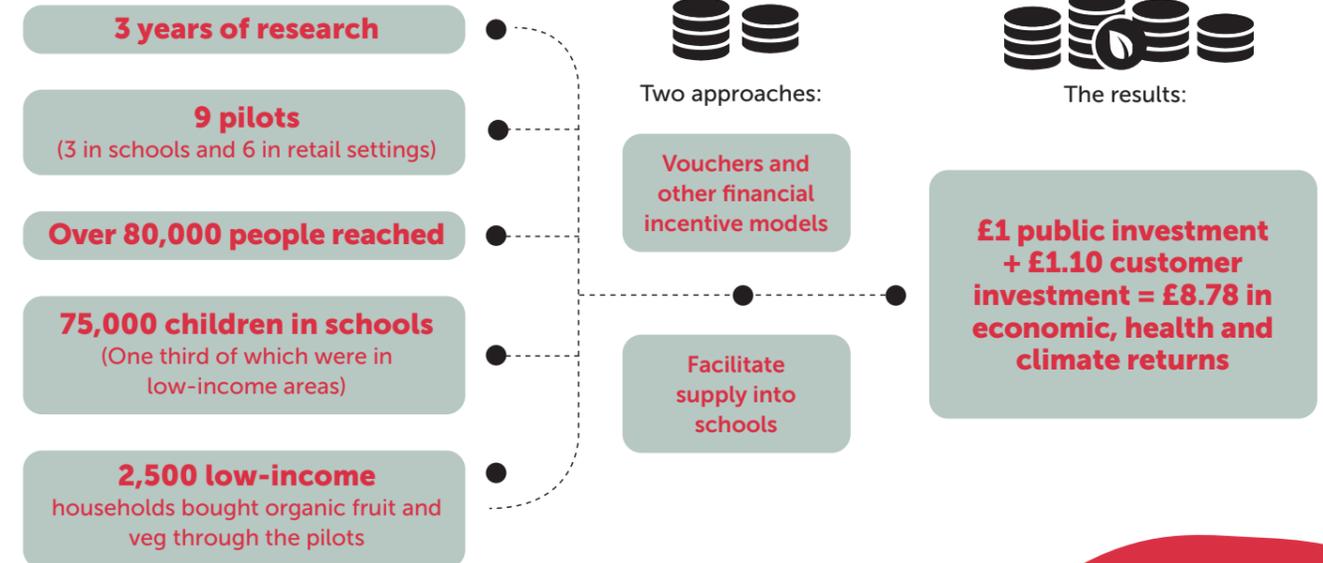
How minimal investment in organic drives significant economic, health and environmental returns.

In 2025 Sustain published the Bridging the Gap report, highlighting how minimal investment in organic by government and consumers could have huge economic, environmental and health returns across local communities.

The research focused on the benefits of 'bridging the gap' between small and medium-scale organic growers and people on low incomes, in both retail and school settings.

The results of the three-year-long study, based on nine pilots across the four UK nations, showed how investment could unlock nutritious, nature-friendly food. The food and farming advocacy group also presented policy recommendations to significantly increase fruit and veg production in the UK to boost jobs and benefit more communities.

Bridging the Gap at a glance



Recommendations:

1. Fix the supply – boost British fruit, veg and pulse production
2. Fix the missing middle – ensure fair prices and invest in local supply chain infrastructure
3. Fix the access – Fund and incentivise public sector food procurement and low income access in retail settings

"This work has demonstrated significant returns on investment in organic, not just for climate and nature, but also for local economics, communities, health and wellbeing. The right support in the right places can unlock access and encourage more growers to produce food that is better for people and planet."

Hannah Gibbs, report author.



[1] August 2025 Hospitality Market Monitor, from CGA by NIQ and AlixPartners

[2] Follow the Carrot, Sustain, 2025

Organic farming

Despite major challenges, policy progress in Scotland and Wales is showing how organic can lead the way for sustainable farming.

What organic farmers say*

- Most farmers report sales either growing (45%) or staying stable (40%). Less than 10% experienced a sales drop.
- Value sales outperformed volume at farm gate: this suggests rising inflation as well as some farmers achieving better margins and higher prices.
- Half expect a good year ahead, while four in ten remain neutral.

Scotland is leading the way in support for organic farming. Total organic land (including land in conversion) in Scotland topped 131,500ha in 2024 – up 26% since 2021 [1].

The country's newly created Organic Action Plan, launched on 27 January 2026, adds even more momentum to grow the sector through investment in production, research and support.

In Wales, the government has signalled support for organic with £3 million available in funding for all eligible farmers with organic certified land in 2026-27. When announcing the scheme, deputy first minister Huw Irranca-Davies spoke about the wider benefits of organic farming – calling it “a cornerstone of sustainable agriculture.”

“Organic farming delivers environmental benefits beyond standard sustainable farming practices,” he said. “These include eliminating artificial fertilisers and pesticides, protecting water quality and building soil health over many years.” The continuation, design and funding of this support will ultimately rest with the next Welsh Government and the next Senedd following the Welsh election in May.

“We need more organic, agroecological fruit and vegetables, so that everyone can and will grow, trade, eat and enjoy healthy food that benefits the environment. To reduce our reliance on imports we need support for growers in the UK, as growing can become a rewarding, valued and accessible career path.”

UK Fruit & Vegetable Coalition



While England saw a 7% increase in land area in organic conversion in 2024 [2], this growth was dramatically slowed by the suspension of the Sustainable Farming Incentive (SFI) – representing the first break in organic conversion support in 30 years.

Despite this, there's a clear opportunity for the organic farming sector to grow in line with the market for organic food.

The Soil Association has worked hard to reinstate support as part of a much-needed new Organic Action Plan for England. This work is bearing fruit, with strong indications that a new English Organic Action Plan could be launched in 2026.

Facing challenges

Organic farmers faced major challenges across the board in 2025. Drought severely affected forage supplies in some regions as well as impacting fresh produce availability. There was also a tough wider economic outlook as operational costs – including wage bills – rose and squeezed margins.

In arable, the climate emergency was fully felt by farmers. Crop production was hit by one of the hottest Spring and Summers on record, leading to drought conditions and more pests to contend with. Farmers reported one of the worst UK harvests in memory with extreme weather costing over £800 million [3]. Drought warnings are already in place for 2026.

In organic dairy, positive volume gains were seen in both milk (+8.8%), and butter (+5.6%), while organic cheese lifted slightly (+1%). Milk shortages in the earlier part of the year affected the cheese industry, slowing production [4].

Pre-competitive sector groups bringing together stakeholders across the supply chain are playing a crucial role in identifying key interventions to grow their categories and address opportunities and threats to growth.

Sophie Gregory, organic dairy farmer and chair of the newly-formed UK Organic Dairy Roundtable, says that the sector is standing at a crossroads.



Farmers' top five strategic priorities

1. Strengthen UK organic farming by supporting domestic producers.
2. Build the evidence base for the benefits of organic to strengthen credibility and consumer trust – and increase consumer engagement and awareness of these benefits.
3. Champion organic in a crowded sustainability space and challenge greenwashing.
4. Influence government to create national action plans for organic.
5. Address UK supply chain challenges, including access to abattoirs and logistics.

*Organic Market Report survey

“The opportunities for organic dairy are huge, especially around animal health, environmental delivery and meeting the growing demand for natural food,” she says.

“But we also know the challenges have never been greater, from volatility to processing bottlenecks and the need for long term confidence. The Organic Roundtable brings the whole supply chain together so we can move faster, share solutions and give farmers a clear sense of direction.”

[1, 2] DEFRA Organic Farming Statistics United Kingdom 2024

[3] <https://eciu.net/media/press-releases/2025/summer-drought-costs-uk-arable-farmers-over-800m-new-analysis>

[4] NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 27th December 2025 © 2026 The NielsenIQ Company.

+13.2%

increase
in organic land
in Scotland



Riding the regenerative wave

At the Organic Trade Conference 2025, panellists spoke about how regenerative agriculture could be a route in for the category. Its rising popularity may provide an opportunity for organic businesses to lead the conversation by showing how they already deliver on regenerative principles.

However, the risk of greenwashing could be a threat to those who use truly nature-friendly practices. Organic is legally regulated, independently inspected and globally recognised – meaning consumers can trust certified organic products.

Increasing regulation, and consumer demands for transparency, means that buyers need credible metrics around sustainability. The organic sector is in a great place to provide them. Soil Association Exchange collaborates with farms to help share what works in nature-friendly practices and collect data to back-up claims. The financial case for more resilient farming systems is also becoming more apparent, with major banks unlocking access to financial plans for farmers.

Small abattoirs under threat

In 2025, prices for organic beef and lamb rose. However, the collapse of small abattoirs is putting pressure on the wider supply chain.

A survey from The Sustainable Food Trust, Soil Association and Rare Breeds Survival Trust found that 88% of food and farming businesses see local abattoirs as important or essential to their livelihood. But they're at risk in the UK – with Food Standards Agency figures showing they're closing at a rate of 10% a year.

This makes the whole system more fragile as producers find it hard to book into remaining abattoirs, which increases costs.

Organic opportunities

Farmers experienced mixed fortunes in 2025 – with results hugely influenced by rainfall. While there were reports of bumper harvests of fruit, walnuts and organic wine – plus rising livestock prices and a buoyant organic beef sector – many farmers had a difficult time.

In the Organic Market Report Survey, farmers spoke about how organic farming is resilient to climate and political change, while favourable EU policy shifts means there is rising confidence in future opportunities. They also spoke of their pride in seeing sustainability in action, from no-till arable systems to restoring hay meadows. The market for UK organic berries also presents an opportunity as consumer demand increases – with few homegrown producers currently in the sector.

Farmers are making practical moves to futureproof organic. With labour harder to find, they're experimenting with new technology to fill the gap.

Sharing these positive stories with shoppers concerned about the climate emergency can help the sector grow. And the kind of supportive and practical government policy seen in Scotland will help organic supply catch up with demand.

Distribution of organic land and processors/producers (hectares 000s) in 2024

Northern Ireland

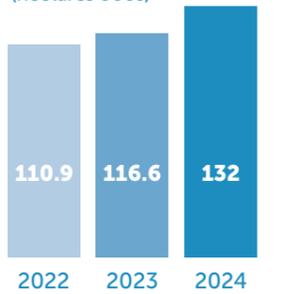
Distribution of organic land and processors/producers (hectares 000s)



Processors/Producers: **192 (+2.1%)**

Scotland

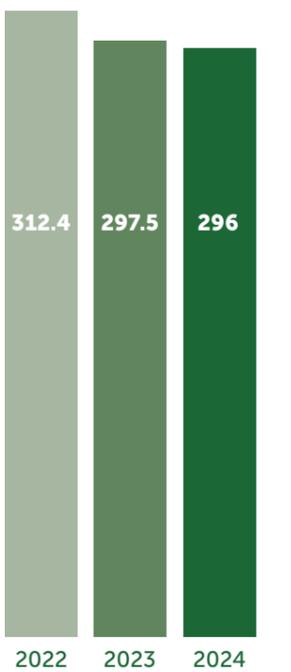
Distribution of organic land and processors/producers (hectares 000s)



Processors/Producers: **530 (+1.7%)**

England

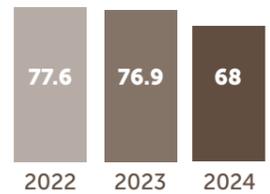
Distribution of organic land and processors/producers (hectares 000s)



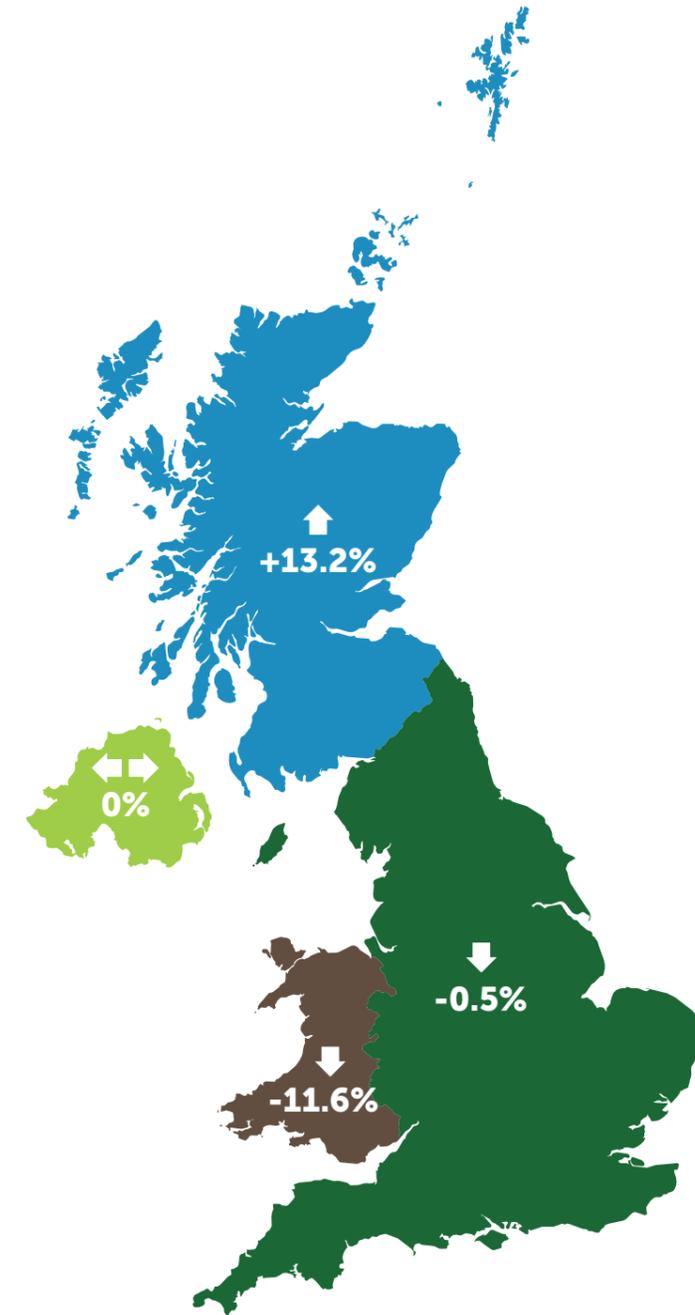
Processors/Producers: **3840 (-1.1%)**

Wales

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



Processors/Producers: **570 (-10.8%)**



	2021	2022	2023	2024	Year-on-year change
Fully organic UK land	464.7	468.3	462.2	454	↓ 1.8%
Land in-conversion	42.0	40.3	35.7	49	↑ 37.3%
Total UK organic land	506.6	509	497.9	503	↑ 1.0%

59% of UK organic land was in England, 26% in Scotland, 14% in Wales and 1.4% in Northern Ireland.

Reference: DEFRA Organic Farming Statistics United Kingdom 2024

Organic beauty and wellbeing

In 2025, rising consumer demand for beauty that's better for health and the environment saw the sector grow by 8%.

There's growing evidence shoppers care deeply about what goes into the beauty and wellbeing products they use every day.

The COSMOS Organic and Natural standards launched in 2017 to harmonise standards from different European certification bodies, including Soil Association Certification. It covers a full range of sustainability criteria, including restricting animal testing, requiring traceability to the supplier, and banning artificial fragrances and microplastics.

Recent research shows a huge majority (84%) of consumers believe at least one aspect of COSMOS certification is important to them, including organic ingredients and recyclable and reduced packaging. Nearly half (47%) want natural ingredients, while 64% don't want products tested on animals. It's further proof consumers expect high standards from the beauty and wellbeing industry.

However, despite this support, the research also revealed low consumer awareness of what COSMOS stands for. This suggests there's a massive opportunity for the industry to boost awareness of how products connect with COSMOS.

Awareness of COSMOS standards has been growing fast among brands – making it the new industry norm for certification.

"I've been going to [industry trade show] SCS Formulate in Coventry for over a decade," says Emma Dawes, Technical Specialist at Soil Association Certification.

"It's been really satisfying to see how awareness of COSMOS has grown within the industry during that time, from practically no awareness to it becoming the norm to get ingredients approved to COSMOS standards."

COSMOS certification is also appearing on UK high streets, with Pai Skincare launching in 42 M&S beauty halls nationwide. Organic brands are leading in innovation with green chemistry formulations to disrupt the market – an indication of demand from consumers relying on COSMOS to indicate product efficacy.

Fighting forever chemicals

Consumers are increasingly waking up to the fact that products people use on their skin should be as safe as possible. One particular area of consumer concern is per- and polyfluoroalkyl substances (PFAS) – chemicals used in consumer products since the 1950s.

They can take thousands of years to degrade, which is why they're known as 'forever chemicals'. Not all PFAS have been studied. But at least some have been linked to health problems like cancer and lowered immunity.

PFAS have never been allowed in COSMOS-certified products – and standard UK cosmetics regulation is slowly evolving to keep up. As demand for ingredient transparency rises, organic brands are stepping up with new innovation to meet the market.

"As concerns around 'forever chemicals' grow, ingredient transparency has never been more important," says Liz Warters, Marketing Manager (Haircare) at Dr. Organic.

"This has inspired our next phase of innovation, where science and nature come together to create clean, accessible formulations that deliver real results."

"With robust efficacy testing and continued alignment to COSMOS Organic standards, we're giving consumers greater transparency on both product performance and the ingredients we use."

Also in formulation, Soil Association Certification campaigns have highlighted 4-Methylbenzylidene Camphor as an unnecessary ingredient that should be left out of cosmetics for good. It's been linked to negative effects on the endocrine system, including the thyroid gland, and banned by the EU, Japan and the USA.

At the end of last year, the UK government finally caught up by officially submitting draft Cosmetic Products (Restriction of Chemical Substances) Regulations, moving to ban it.

For the future, industry will most likely need to move first to make up for slow government progress. That means voluntary certifications such as COSMOS will become more important as consumer awareness and demand for better beauty continue to increase.

Consumer priorities when buying skincare or beauty products.



Source: YouGov Crunch, Sustainable Beauty Certifications, 2025

What organic beauty and wellbeing brands say

67% reported a sales increase in 2025.

85% believe sales will increase in 2026.

The biggest challenge is customers buying less due to cost pressures.

Source: Organic Market Report Survey



Shoppers value organic benefits

- The Soil Association organic symbol is the most widely recognised in beauty among UK consumers.
- **65%** of shoppers say sustainability affects their beauty and skincare buying decisions.
- When prompted, most consumers (**57%**) say organic ingredients are important when buying their beauty and skincare products.



Organic textiles

In 2025 sales from Soil Association Certification organic textiles clients rose 10% as shoppers recognised the need for cleaner, fairer fashion and certification diversified into wellbeing categories.

Consumer attitudes to fashion and textiles are changing fast. New research from YouGov, commissioned by Soil Association Certification, highlights just how important sustainable and ethical concerns are when buying clothes and fabrics.

Over half of shoppers (51%) are concerned about garment workers being paid a fair wage. Plus, elements of Global Organic Textiles Standard (GOTS) certification (including choosing organic, natural fibres, respecting working conditions and leaving no harmful chemical residues) are important to over three-quarters (77%) of people polled. Consumers support the way GOTS benefits workers – requiring everyone to follow International Labour Organisation standards and making sure brands have a plan to offer a living wage if they don't already pay it.

Despite this shopper-led movement for greener, cleaner clothes and textiles, consumer awareness of GOTS is relatively low. In fact, research showed that most shoppers are unaware of any sustainable

textile schemes. The challenge is clear: shoppers actively want GOTS-certified products – and need to know they're available.

In response, GOTS have begun to tackle this with increased social media activity, such as the new 2025 #SpotGOTS campaign as part of #BehindTheSeams. #SpotGOTS helped brands showcase their products across social media while reminding shoppers that buying certified products is a practical way to address their concerns.

Fuelling fashion success

Credible certification can fuel brand success. For example, family-owned and Leicestershire-based manufacturer 13Amp have seen a 226% increase in GOTS-certified sales.

"We're now into our third year of membership and have seen our sales on organic products considerably increasing – over the past twelve months in particular," says David Wilson, Fabric/ Technical Manager at 13Amp.

He adds that maintaining accreditation has helped focus the business on sustainability and social and ethical awareness, which increases workload, but is "very rewarding."

"GOTS certification has led to us having to re-look at company procedures and implementing systems to comply more with the sustainable side of things."

"We have always prided ourselves as being a very ethical business. Our GOTS certification from Soil Association Certification gives us a great platform to work with. It gives customers confidence in 13Amp that the values within the standards are in place"

Banishing cancer-causing chemicals

In the textiles world one of 2025's most shocking developments was a new scientific report which found traces of glyphosate, a pesticide linked to cancer, at very high levels in UK tampons*. The report came from the Pesticide Action Network UK (PAN UK), the Women's Environmental Network and the Pesticide Collaboration.

The maximum UK residue for glyphosate in drinking water is 0.0001 mg/kg. Researchers found glyphosate present at 40 times that level in tampons. Even small amounts can cause health risks.

Plastic-free products are in demand by people who use tampons. But during 2025 challenger brands have had to reformulate after rivals questioned plastic-free claims. This level of shopper scrutiny for the category means certification consumers trust is more important than ever.

Paulina Szklarek, Managing Director of GOTS-certified tampon brand &Sisters recognises that any product *"built around bodies"* should be held to the highest standards of safety and transparency.

"Last year has made it clear how gaps in regulation and accountability still leave consumers exposed to harmful ingredients, unverified claims and misleading greenwashing," she said.

"We've also seen the issue go beyond the shelf, with factual, evidence-based content about menstruation continuing to be restricted [via social media algorithms]."

"Taken together, it's a reminder that doing things the right way isn't optional – in product, in communication, or in accountability. It means safety-first design, radical transparency and evidence over empty marketing. When people are putting products inside their bodies, trust shouldn't be something brands ask for. It should be something they prove."



Sustainability is shaping shoppers' choices

70% of shoppers say sustainability shapes their choices around clothes and textiles.

Most consumers (**52%**) say organic is important when buying new fashion or textiles.

Over half (**51%**) are concerned about garment workers being paid a fair wage.

Source: YouGov Crunch, Sustainable Fashion Certifications, 2025

*Blood, Sweat and Pesticides, Pesticide Action Network, May 2025.

Global organic

A recovering European market is helping organic go for growth despite cost-of-living pressures. The Research Institute of Organic Agriculture (FiBL) has reported an increase in global organic sales in 2025 of €6.9bn to €145bn.

After a tough recent period, figures show that the European Union's organic market is starting to recover.

Inflation is still a challenge in some areas – and cost-of-living pressures are shaping the retail landscape. Meanwhile, FiBL data reveals a trend for more farmers converting to organic across Southern Europe – especially in Portugal and Greece. Experts believe this is a tactical response to extreme heat fuelled by the climate emergency, with farmers choosing more nature-friendly approaches to build resilience.

Direct sales drive growth in France*

The first half of 2025 saw organic bounce back in France – driven by sales recovering in supermarkets, rebounding in specialist stores and responding to a surge in direct-to-consumer activity.

The latter channel was a particular high point, with direct sales driving the market through an 8.8% uplift. Specialist organic shops were the second biggest growth driver, with sales rising 6.2%. Meanwhile, in supermarkets, organic products experienced a 0.9% value sales boost, compared to non-organic at 2.8%. Limited availability of organic affected distribution – highlighting the huge demand in France.

Overall, in 2025 organic sales increased 4.1% compared to the first half of 2024. These positive results marked the first six-month growth period for organic products in all distribution channels since 2021.

Own-label sales surge in Germany**

Initial estimates for January-September 2025 suggest positive growth in both organic value and volume sales – with both up between eight and ten per cent. With shoppers seeking out value, sales of own-label organic food rose 13.5% in 2024, with branded products up 3.3%.

US growth powered by protein***

In 2025 early estimates show US organic sales up more than 6.5% to reach \$75 billion, well above total food sector growth of 2.3%. Most of this growth was propelled by volume uplifts.

Protein-focused categories performed particularly well, with both meat, poultry and seafood and dairy and eggs categories posting double-digit rises. This trend reflects a broader shift in American health-driven consumption toward protein, especially animal-based protein.



Driving demand

In the Netherlands, supermarket PLUS is experimenting with making organic products the sole choice on the shop floor in key categories like eggs, milk and vegetables. For example, close collaboration throughout the supply chain means that nearly every retailer in the Netherlands sells homegrown organic beetroot from Dutch growers all year round.

Meeting Middle Eastern markets

Beyond Europe and the US, demand for organic is growing in the Middle East, including key markets like Saudi Arabia and the United Arab Emirates (UAE). For example, high-end premium fresh food retailer Spinney's reported record profits in part driven by organic lines. UAE offers huge export opportunities as it's the eleventh biggest importer of UK food and drink globally, and the third outside EU nations, according to the UK Food and Drink Federation.

Boost in beef

Ireland is showing the world how government support for organic producers can translate into export success in the UK. Sales abroad are grounded by support for Irish organic farmers – who have increased by 221% to 5,500 over the last five years. The government has already pledged €58.6 million to support these farmers and encourage organic production.

Minister for Agriculture, Food, Fisheries and the Marine, Martin Heydon said: "Organic farming depends on the people on the ground, the custodians of our rural landscape. In cooperation with the organic control bodies, farming families and our wider rural communities, organic is now a viable and rewarding option for young farmers to enter the sector, as well for conventional farmers trying to diversify."

Aiming higher

"Higher Living has built steady and profitable growth in the organic sector by focusing on long-term partnerships and consistent export performance from the UK. Our recent launch into Bristol Farms with UNFI reflects this measured approach and the importance of working with partners who are genuinely passionate about the brand. In the US we have maintained retailer relationships for over a decade which demonstrates both stability and trust. Organic continues to resonate strongly with buyers as it supports key category requirements. Higher RRP's and strong consumer awareness in the US also mean shoppers are more willing to pay a modest premium than in many other international markets."

Charlotte Garden, Managing Director, Only Natural Products Ltd.



The year ahead

Championing the organic sector from farm to fork, practice to policy

Evidence shows that organic benefits people, communities, the economy and our planet.

At the Soil Association, we're committed to making organic valued, supported and available – continuing our work through Organic for All and helping the sector achieve its market potential in 2026 and beyond.

Competition for market share

In 2025 big-hitting brands like Ocado, M&S and Aldi all gained organic market share. This means remaining retailers will need to catch up in 2026. Major players could focus further on organic with deeper ranging and more targeted promotions.

Promotional activity will remain key throughout the year. Stubborn inflation suggests that the cost-of-living will carry on shaping consumer spending, even as shoppers prioritise sustainability. The shift to discounters will show no sign of slowing, while budget-friendly supermarkets will concentrate on organic products at lower price-points.

Price pressure isn't a barrier to worldwide organic expansion. The US organic market continues to grow strongly – and most developed EU markets are either in growth or returning to growth.

Exporting to the EU

Exporters also face uncertainty over future EU legislation including the Green Claims Directive and Empowering Consumers Directive.

The latter could create challenges for private certifications and limit the environmental claims organic brands exporting product to the EU can make (affecting all products - even those already on the market - from Sept 2026). Beyond this, with EU-UK SPS alignment being negotiated and organic on the table, it is hoped that exporters will expect less red tape (e.g. requirement for Certificates of Export) by 2027.

However, if the UK government recognises export opportunities, and leans into closer regulatory alignment with the EU, there's the opportunity to follow in the footsteps of Denmark and Ireland, expanding domestic production while boosting exports.

Elsewhere, precision-bred plants will present another regulation challenge. Today, genetically-engineered (GE) crops can be cultivated and sold in the UK – yet producers don't have to clearly label them. This could, in some instances, put extra burden on organic businesses as they take additional steps to avoid GE entering the supply chain. In the absence of government legislation to mandate the identification of GE in the supply chain, Soil Association Certification are working hard with farming and trade partners to build and agree codes of practice which reduce the burden of identification and separation as much as possible.

In 2026, Soil Association Certification will update the evidence base for the economic and environmental benefits of organic – as well as driving research to fill in the gaps.

That process will help the sector stay ahead of the best animal welfare and sustainability practices, going beyond carbon emissions and including vital variables like local sourcing.

Decision makers like Compassion in World Farming and the Waste & Resources Action Programme (WRAP) increasingly acknowledge that hybrid metrics, including farm assurance, are essential. This puts organic in a good position to benefit.

Building a more secure food system

The UK needs government policy that prioritises a safer, more secure food system. In 2025 calls for action gained momentum with positive results, particularly in Scotland and Wales.

Shoppers are making connections between ultra-processed food, fragile supply chains and the climate emergency. The market for organic is growing and yet policy makers are failing to protect British farmers and food security by relying on imports. As the government's own report made clear: urgent change is needed to the way we produce and eat to create a food supply everyone can rely on.

Organic is a proven solution to support long-term resilience, both economic and environmental. Whatever 2026 has in store, now's the time to drive that change.

About Soil Association Certification

We are 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 forest 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. The EU Deforestation Regulation, and future UK Forest Risk Commodity Regulation, are anticipated to drive significant change in how products are sourced from areas at risk of deforestation. We're on a mission to support companies on their journey to responsible and legal sourcing of all forest risk commodities. That's why we've developed a suite of innovative, specialised training courses and a brand-new verification service for 2026.



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.

Soil Association Certification is a company of the Soil Association, an innovative charity with 80 years of expertise in practical food, farming and forestry solutions. All Soil Association Certification profits are either given to the Soil Association Charity or reinvested into the business to help grow the organic market. Through our certification work, and by sharing our profits, we help the Soil Association deliver programmes 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.



Organic Trade Conference 2026

October 15th, Barbican Centre, London

Get inspired by a packed agenda of talks and insights, discuss ideas and build valuable connections with other industry professionals.

www.soilassociation.org/tradeconference

