

# Organic UK



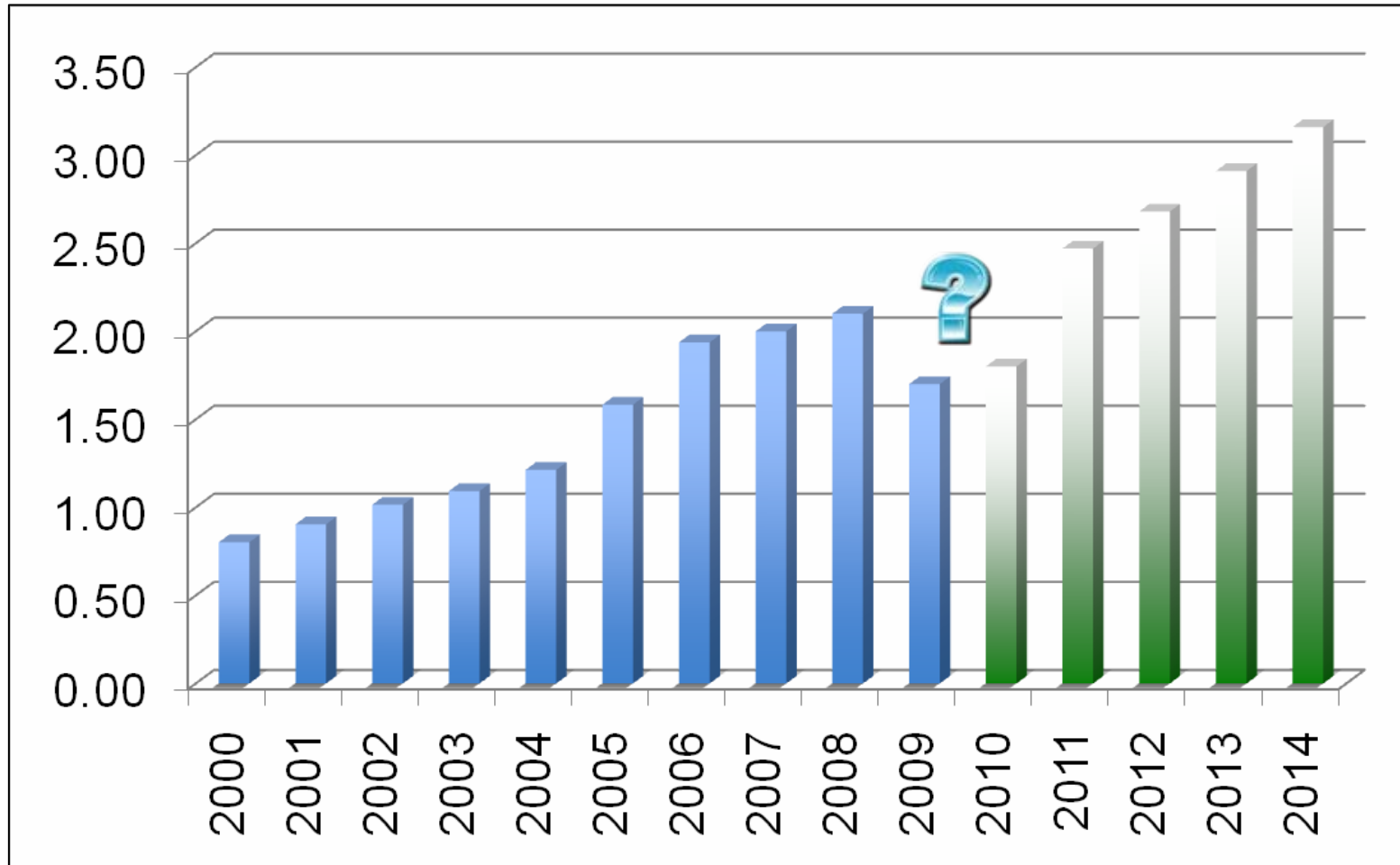
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**Soil Association**

# A New Decade for Organics



Soil Assoc. Annual reports & industry sources

Organic<sup>UK</sup>

# What's the opportunity?

- a 'fledgling' market – headroom is 98%
- consumers have had a decade of premiumisation of food
- a number of categories are resilient and pushing ahead despite the downturn
- strong brands complement speciality
- expert industry with unrivalled experience
- the recession is 'turning a corner'

# Current market position

	12 weeks ending 29 <sup>th</sup> Nov 09	52 weeks ending 29 <sup>th</sup> Nov 09	
Total Market	-9.6%	-14.4%	✓
Core Grocery	-6.4%	-5.9%	
Produce	-9.7%	-16.3%	✓
Chilled incl Dairy	-4.2%	-8.3%	✓
Meat & Poultry	-21.3%	-20.7%	
Bakery	-33.3%	-40.7%	✓

Nielsen data

# Category News

- Beverages /Sugar +8.5%
- Biscuits +10.5%
- Rice/Pasta +18.1%
- Adult Yoghurts +7%

- Vegetables (0.8%)
- Cereals (1.5%)
- Desserts/Baking (2.8%)

Fresh Meat

(17.2%)

Fruit (16%)

Potatoes (15.4%)

# Retailer News

## Market Share of Organic Sales

	12 weeks ending 29 <sup>th</sup> November 09	52 weeks ending 29 <sup>th</sup> November 09
Asda	8.3%	9.3%
Tesco	26.5%	27.6%
Sainsburys	22.9%	23.5%
Morrisons	6.9%	6.2%
Waitrose	18.7%	17.1%



Nielsen data

# Survey Results

83% people  
buy organics

Top 10  
reasons for  
buying  
organics

Naturalness/unprocessed	40%
Restricted use of pesticides	34%
Better taste	30%
Better for my wellbeing	28%
Better for the planet	25%
More care in farming	24%
Kind to animals	22%
GM free	18%
Encourage wildlife	16%
Helping climate change	12%
Smarter/posher	2%

68% women would  
buy more organic  
product if the price  
was lower

Top  
Categories

Fruit & Veg (53%)  
Eggs (52%)  
Meat, fish and poultry (49%)  
Dairy 43%

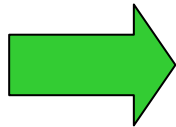
60% buy in  
supermarkets  
and 33% would  
buy more if there  
was more  
choice

# Business Plan Action

Consumer  
Marketing

Generic  
Advertising

Raising  
awareness



- Re-establish good news in the press
- Commence work on branding, development of generic messages and sector specific messages
- Increase consumer awareness and recognition of Organic products
- Opportunity to deliver a united, yet simple message about the meaning and merits of Organics
- Ensure that consumers experience the same messages and stimuli across the industry

# Progress Update



# The Future of Food **Soil Association Conference** 3 & 4 February 2010 Birmingham

This two day conference presents a series of challenging debates about the role of science, politics, farming and food sectors and their respective roles in the action, innovation and transition to sustainable models that is needed if we are to feed ourselves now and in the future.

For more information about the programme  
or to book a place go to:

**<http://www.soilassociation.org>**

**Organic<sup>UK</sup>**