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International Markets Bureau

MARKET INDICATOR REPORT | NOVEMBER 2011

Organic Packaged Food
in the United Kingdom

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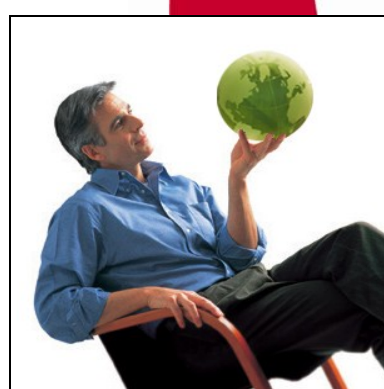

Growing Forward

Canada

EXECUTIVE SUMMARY

Consumer demand for organic products in the United Kingdom (U.K.) has been negatively affected by consumers' declining disposable incomes in the recent past. Similar to many other parts of the economy, the organic market had a difficult year in 2010. However, the rate of decline experienced in the previous two years has slowed, and the organic market is regaining ground as consumer confidence returns. There are positive signs of resilience and recovery, and some products have already started to experience growth again. Baby food, confectionery, rice, oils and fats, and spreads were all organic subcategories that saw their value sales increase in 2010 over 2009 figures, while organic baby food and organic rice saw their volume consumption grow as well. Although competitive pricing is crucial, shoppers are unwilling to compromise on sensory attributes in order to save money.

Globally, healthy growth rates resumed in 2010 as the 'mainstreaming' of organic products continued. A major driver of organic market growth in all geographic regions is the increasing distribution through mainstream retailers.

In 2010, private label and "others" dominated the U.K.'s organic packaged food sector, with 66.7% of the market. Hipp GmbH & co Vertrieb KG, a German company, was the market leader in the organic baby food sub-category. Multinational Kraft Foods Inc. had the majority share in the organic confectionery sub-category, while Mars Inc. had the greatest market share in organic sauces, dressings and condiments.

In the U.K., consumers are drawn not only to the health benefits of organically grown products, but also to ethically sourced and sustainably produced packaged goods. Industry response to this new socially conscious consumerism will become increasingly important.

Canada and the European Union (E.U.) reached an equivalency agreement regarding organic products as of June 24, 2011, which is expected to boost organic food trade between these two markets. This organic equivalency agreement is the result of discussions between the European Commission and the Canadian Food Inspection Agency (CFIA), reviews of the two markets' respective organic rules, and spot checks of control measures in both regions.

The definitions of the organic packaged food subcategories can be found in the Annex, on page 21 of this report.

INSIDE THIS ISSUE

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DID YOU KNOW?

ORGANIC ICE CREAM, BABY FOOD AND BAKERY PRODUCTS SAW THE HIGHEST VOLUME CONSUMPTION OF ALL ORGANIC PACKAGED FOOD IN THE UNITED KINGDOM IN 2010.

CONSUMER TRENDS

- There are many different motivations for consumers to buy organic products, including, for example, a guarantee that the food is free of genetically modified (GM) ingredients and the over 300 additives and pesticides that are banned under organic standards; as well as an emphasis on production and farming methods that are environmentally friendly, including better animal welfare practices. There is strong evidence that consumers who care about these diverse benefits have stayed loyal to organic products, even during tough economic times.

Source: *Shutterstock*

- In 2010, a Datamonitor survey found that almost half of U.K. shoppers had a "more favourable" (34%) or "significantly more favourable" (13%) perception of grocery products if they were organic. However, only 21% of these consumers agreed to some extent that organic food is worth paying "a bit" extra for. Furthermore, of those consumers willing to pay extra for organic produce, the majority are only willing to pay an additional 0-5%. This is not expected to change significantly in the next year.

- In the U.K., 86% of households bought organic food or drink products in 2010. On average, consumers bought organic products 15 times in 2010, compared to 16 times the previous year. These consumers tended to buy organic if the product was perceived to offer additional benefits, such as enhanced levels of sensory appeal (taste, flavour, or authenticity, for example). In order to increase these figures, greater emphasis needs to be placed on these aspects of organic products, so that shoppers feel they can immediately benefit from consumption.

- The strongest motivator for purchasing organic food products is the consumer's desire to avoid harmful chemical residues. In addition, U.K. consumers placed health concerns, as well as safe environmental and animal welfare practices as the next greatest motivating factors. In a survey among U.K. mothers aged 25-50, two-thirds said they were happy to pay more for the best quality foods, one-third said they always buy organic products, and three-quarters said they choose the most affordable food. Despite these claims, only 15% of U.K. consumers buy organic food and drink on a regular basis, a rate that has remained unchanged from 2009. Additionally, just eight percent of the households who buy organic products more than twice a month account for 54% of sales, meaning the core consumer base is relatively static.

- In general, U.K. consumers are more cautious with their money, as seven out of ten shoppers are now more likely to question if they are getting value for their money, with 41% of food consumers buying more private label products compared to the previous year.

- In 2010, consumers in the U.K. were making a greater effort to control portion intake, with 42% indicating they always or primarily eat smaller portions as a rule, up from the 25% reported the previous year. This trend indicates food consumers would rather eat a wide range of food and monitor portion sizes, than completely give up certain types of food in an effort to eat healthier.

Source: *Shutterstock*

RETAIL TRENDS

- In 2010, a survey conducted by Datamonitor revealed that 19% of U.K. grocery shoppers have visited discount stores more regularly as a result of the economic downturn. Additionally, 71% of those surveyed said good quality has a significant influence on where they shop, and 58% said that lower prices have a significant influence on the retail channel of choice.

KEY RETAILERS

- Tesco, Sainsbury's, Morrisons and Co-operative Food predict level organic sales year-on-year, while Waitrose and Marks & Spencer anticipate modest growth.

- The leading organic retailer in the U.K. is Tesco, with 28.1% of retail sales. It retails over 630 organic products in multiple categories, with yogurt, beef, jar products, and fish as its best performers in 2010. Its own-label products accounted for around two-thirds of its overall organic sales. In 2010, Tesco operated 4,811 stores worldwide, 2,715 of which were in the U.K. In the British market alone for the 2010-2011 fiscal year, Tesco's portfolio consisted of 1,285 Express stores, 599 One Stop stores, and 470 Superstores. Tesco's revenue from the U.K. was US$67,153 million in 2010, a 2.2% increase over 2009.

- J. Sainsbury's retailing segment operates 934 stores in the U.K., comprised of 537 supermarkets and 337 convenience stores. Since 2006, the company has been awarded 'Supermarket of the Year" four times at the Retail Industry Awards. The company markets over 800 organic products, with bestsellers in the dairy and produce categories, as well as frozen foods, bakery and fresh meat. Its organic sales were approximately US$11.2 million per week, reaching a total of approximately US$574.7 million for the 2010 fiscal year. Of these figures, Sainsbury's SO organic range accounted for roughly US$7.1 million and US$367.1 million, respectively.

- Morrisons offers a range of products through its own organic label, including eggs, cheese, potatoes, mushrooms, tea bags and muesli. Morrisons claims to serve 11 million consumers every week, making it the fourth-largest supermarket chain in the U.K., with 455 superstores.

- Waitrose belongs to the John Lewis Partnership company, and operates 256 supermarkets and convenience stores in the U.K. The Waitrose division recorded revenues of US$6,821.3 million in the 2010 fiscal year, an increase of 9.6% over 2009. Waitrose stocks over 1,600 organic products, and is looking to expand its convenience-oriented offerings. The store is positioned as a premium food specialist, and claims to have had a total of 9.4 million visitors in 2010.

- Marks & Spencer (M&S) operates 158 Simply Food stores, and 194 Simply Food franchises in the United Kingdom. For the 2010 fiscal year, the company recorded US$15,272.9 million in global sales, of which the U.K. accounted for 89.8%. The company's food division accounted for 51.5% of total revenues. As part of their strategy, called "Plan A," they have an initiative to increase the proportion of organic food available in their stores. In 2011, the company plans to introduce 100 distinctive international brands, exclusively available at M&S.

DEVELOPMENTS

- A new co-operative supermarket has opened in London, called The People's Supermarket. It uses cutting-edge branding and media engagement to attract shoppers looking for a differentiated retail experience. The strategy of the organization is to address consumer demand for quality, low-cost brands that are sustainably produced and sourced. The store also sells packaged branded food to ensure that members have access to all of their shopping needs at one location, putting itself in position to take advantage of both ethical and boutique trends.

United Kingdom Organic Market, Retailers' Share Total Food and Drink Sales - 2010

	Organic Sales % Share
Waitrose	5.7%
Marks & Spencer	1.5%
Tesco	1.0%
Co-operative Food	0.7%
Morrisons	0.5%

Source: *The U.K. Organic Market Report 2011, Soil Association*

Source: *Company websites*

Organic Packaged Food Distribution – Historic Retail Value % Breakdown

Outlets	2005	2006	2007	2008	2009	2010	Period Growth	
							2005-10 Total %	2005-10 CAGR %
Store-Based Retailing	98.3	98.2	98	97.7	97.4	97.4	-0.9	-0.2
Supermarkets/Hypermarkets	68.3	68.6	68.9	68.7	68.5	68.5	0.2	0.0
Discounters	1.6	1.8	1.9	2.0	2.1	2.2	34.4	6.1
Small Grocery Retailers	19.4	19.9	20.3	20.7	21	21.2	9.1	1.8
Convenience Stores	3.5	3.7	3.8	3.9	4.0	4.0	14.3	2.7
Independent Small Grocers	14.7	15.0	15.2	15.4	15.6	15.8	7.1	1.4
Forecourt Retailers	1.2	1.3	1.3	1.4	1.4	1.4	17.5	3.3
Other store-based retailing	9.0	8.0	6.9	6.3	5.9	5.6	-37.6	-9.0
Other Grocery Retailers	7.2	6.2	5.3	4.7	4.3	4.1	-42.9	-10.6
Non-Grocery Retailers	1.8	1.7	1.7	1.6	1.5	1.5	-16.7	-3.6
Non-Store Retailing	1.7	1.8	2.0	2.3	2.5	2.6	53.3	8.9
Vending	0.4	0.4	0.4	0.4	0.3	0.3	-26.8	-6.1
Home Shopping	-	-	-	-	-	-	-	-
Internet Retailing	1.2	1.4	1.6	1.9	2.2	2.3	83.9	13.0
Direct Selling	0.1	0.0	0.0	0.0	0.0	0.0	-42.3	-10.4

Source: *Euromonitor, Health and Wellness, 2011*

MARKET SIZE AND TRENDS

- The majority of organic food sold in the U.K. is in the packaged food format, and this category was valued at US$1.8 billion in 2010. Organic food as a whole enjoyed a compound annual growth rate (CAGR) of 7.7% from 2005 to 2010, with organic packaged food slightly outperforming it, with a CAGR of 7.9% over the same time period.

- While organic ice cream, baby food and bakery products experienced the highest volume consumption in 2010, the greatest value sales belonged to dairy products, baby food and bakery products with sales of US$658.4 million, US$288.9 million, and US$184.2 million respectively.

- The sub-category with the highest CAGR from 2005 to 2010 in value terms was dairy products (13.7%), followed by baby food (12.4%), and oils and fats (11.9%). In volume terms, baby food recorded the highest CAGR over the same time period (10.6%), followed by oils and fats (8.7%), and confectionery (7.1%).

RETAIL VALUE

United Kingdom Organic Packaged Food Market Sizes
Retail Value in US$ millions – Current Prices

Categories	2005	2006	2007	2008	2009	2010
Organic	1,415.10	1,670.10	1,962.40	2,037.80	2,052.10	2,047.50
Organic Packaged Food	1,242.80	1,472.80	1,743.80	1,813.40	1,822.40	1,818.60
Organic Baby Food	161.3	186.2	212.7	236.6	262.8	288.9
Organic Bakery Products	191	200.2	217	201.6	192.1	184.2
Organic Confectionery	71.9	92.2	111.6	120.3	123.7	124.4
Organic Dairy Products	346.1	467	617.3	663.7	665.3	658.4
Organic Ice Cream	46.4	51.7	57.9	61.5	62.8	61.4
Organic Oils and Fats	18.5	22.4	25.6	29	31.2	32.3
Organic Ready Meals	110.2	129.8	151.9	141.9	140.6	132.9
Organic Rice	8.2	9	10.1	10.5	11.2	12.1
Organic Sauces, Dressings and Condiments	22.1	27.3	30.3	32.4	32.8	32.3
Organic Snack Bars	9.1	8.9	9.2	9.2	9.1	9.0
Organic Soup	38.4	40.9	43.7	45.8	46.4	45.9
Organic Spreads	27.4	32.7	39.9	44.4	44.1	44.8
Organic Sweet and Savoury Snacks	96.7	98.5	100.2	95.9	88.1	83.3
Other Organic Packaged Food	95.6	106	116.5	120.6	112.3	108.5

Source: *Euromonitor, Health and Wellness, 2011*

Source for all: *Mintel*

United Kingdom Organic Food Market Sizes
Period Growth based on Retail Value in US$ millions – Current Prices

Categories	2005-10 Total %	2005-10 CAGR %
Organic	44.7	7.7
Organic Packaged Food	46.3	7.9
Organic Baby Food	79.1	12.4
Organic Bakery Products	-3.6	-0.7
Organic Confectionery	72.9	11.6
Organic Dairy Products	90.2	13.7
Organic Ice Cream	32.4	5.8
Organic Oils and Fats	75.3	11.9
Organic Ready Meals	20.6	3.8
Organic Rice	47.0	8.0
Organic Sauces, Dressings and Condiments	46.3	7.9
Organic Snack Bars	-1.1	-0.2
Organic Soup	19.7	3.7
Organic Spreads	63.8	10.4
Organic Sweet and Savoury Snacks	-13.8	-2.9
Other Organic Packaged Food	13.5	2.6

Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes
Forecast Retail Value in US$ millions – Current Prices, Fixed 2010 Exchange Rates

Categories	2011	2012	2013	2014	2015
Organic	2,042.0	2,061.3	2,100.3	2,149.8	2,202.8
Organic Packaged Food	1,806.6	1,817.4	1,846.3	1,882.8	1,922.2
Organic Baby Food	311.4	332.0	349.9	363.7	374.4
Organic Bakery Products	178.1	174.9	174.8	176.5	179.9
Organic Confectionery	125.9	125.7	127.8	129.7	132.3
Organic Dairy Products	644.0	647.9	660.3	677.3	692.8
Organic Ice Cream	58.8	56.6	54.7	53.9	53.7
Organic Oils and Fats	32.4	32.4	32.5	32.9	33.5
Organic Ready Meals	127.8	124.3	123.9	124.4	126.8
Organic Rice	12.8	13.3	13.9	14.7	15.6
Organic Sauces, Dressings and Condiments	31.1	30.2	29.6	29.3	29.7
Organic Snack Bars	8.9	8.9	8.9	9.0	9.2
Organic Soup	44.7	43.9	44.2	44.8	44.8
Organic Spreads	45.7	46.5	47.2	48.0	48.7
Organic Sweet and Savoury Snacks	79.6	77.2	75.7	75.3	76.0
Other Organic Food	105.2	103.5	102.9	103.4	104.9

Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes
Forecast Period Growth based on Retail Value in US$ millions – Current Prices

Categories	2010-15 Total %	2010-15 CAGR %
Organic	7.6	1.5
Organic Packaged Food	5.7	1.1
Organic Baby Food	29.6	5.3
Organic Bakery Products	-2.3	-0.5
Organic Confectionery	6.3	1.2
Organic Dairy Products	5.2	1.0
Organic Ice Cream - 000' litres	-12.6	-2.7
Organic Oils and Fats	3.6	0.7
Organic Ready Meals	-4.6	-0.9
Organic Rice	28.7	5.2
Organic Sauces, Dressings and Condiments	-8.1	-1.7
Organic Snack Bars	1.4	0.3
Organic Soup	-2.5	-0.5
Organic Spreads	8.7	1.7
Organic Sweet and Savoury Snacks	-8.8	-1.8
Other Organic Packaged Food	-3.4	-0.7

Source: *Euromonitor, Health and Wellness, 2011*

RETAIL VOLUME

United Kingdom Organic Packaged Food Market Sizes – Retail Volume in '000 tonnes

Categories	2005	2006	2007	2008	2009	2010
Organic	*not calculable*					
Organic Packaged Food	*not calculable*					
Organic Baby Food	19.2	22.2	25.0	27.4	29.7	31.9
Organic Bakery Products	53.9	54.7	53.8	44.7	39.8	36.1
Organic Confectionery	3.3	4.1	5.0	5.2	5.0	4.6
Organic Dairy Products	*not calculable*					
Organic Ice Cream - 000' litres	5,701.5	6,294.4	6,432.3	6,559.0	6,490.1	6,231.8
Organic Oils and Fats	2.7	3.2	3.6	3.9	4.1	4.1
Organic Ready Meals	8.4	9.3	10.3	9.4	8.9	8.0
Organic Rice	1.3	1.4	1.6	1.6	1.6	1.7
Organic Sauces, Dressings and Condiments	7.4	7.4	7.0	6.6	6.1	5.6
Organic Snack Bars	0.6	0.6	0.6	0.6	0.6	0.6
Organic Soup	10.6	11.1	11.7	11.9	11.7	11.1
Organic Spreads	3.2	3.7	4.3	4.7	4.3	4.0
Organic Sweet and Savoury Snacks	4.9	4.9	5.0	4.8	4.4	4.2
Other Organic Packaged Food	15.4	16.7	17.9	18.2	16.6	15.5

Note: *the total retail volume of some categories cannot be calculated because products within those categories are quantified in different units of measure (e.g. litres versus tonnes).*
Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes – Retail Volume in ’000 tonnes

Categories	2005	2006	2007	2008	2009	2010
Organic	*not calculable*					
Organic Packaged Food	*not calculable*					
Organic Baby Food	19.2	22.2	25.0	27.4	29.7	31.9
Organic Bakery Products	53.9	54.7	53.8	44.7	39.8	36.1
Organic Confectionery	3.3	4.1	5.0	5.2	5.0	4.6
Organic Dairy Products	*not calculable*					
Organic Ice Cream - 000' litres	5,701.5	6,294.4	6,432.3	6,559.0	6,490.1	6,231.8
Organic Oils and Fats	2.7	3.2	3.6	3.9	4.1	4.1
Organic Ready Meals	8.4	9.3	10.3	9.4	8.9	8.0
Organic Rice	1.3	1.4	1.6	1.6	1.6	1.7
Organic Sauces, Dressings and Condiments	7.4	7.4	7.0	6.6	6.1	5.6
Organic Snack Bars	0.6	0.6	0.6	0.6	0.6	0.6
Organic Soup	10.6	11.1	11.7	11.9	11.7	11.1
Organic Spreads	3.2	3.7	4.3	4.7	4.3	4.0
Organic Sweet and Savoury Snacks	4.9	4.9	5.0	4.8	4.4	4.2
Other Organic Packaged Food	15.4	16.7	17.9	18.2	16.6	15.5

Note: *the total retail volume of some categories cannot be calculated because products within those categories are quantified in different units of measure (e.g. litres versus tonnes).*
Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes
Period Growth based on Retail Volume in ’000 Tonnes

Categories	2005-10 Total %	2005-10 CAGR %
Organic	*not calculable*	
Organic Packaged Food	*not calculable*	
Organic Baby Food	65.6	10.6
Organic Bakery Products	-32.9	-7.7
Organic Confectionery	41.0	7.1
Organic Dairy Products	*not calculable*	
Organic Ice Cream - 000' litres	9.3	1.8
Organic Oils and Fats	51.6	8.7
Organic Ready Meals	-3.8	-0.8
Organic Rice	24.7	4.5
Organic Sauces, Dressings and Condiments	-23.2	-5.1
Organic Snack Bars	2.0	0.4
Organic Soup	5.0	1.0
Organic Spreads	23.1	4.2
Organic Sweet and Savoury Snacks	-14.4	-3.1
Other Organic Packaged Food	0.3	0.1

Note: *the total retail volume of some categories cannot be calculated because products within those categories are quantified in different units of measure (e.g. litres versus tonnes).*
Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes
Forecast Retail Volume in ’000 tonnes

Categories	2011	2012	2013	2014	2015
Organic	*not calculable*				
Organic Packaged Food	*not calculable*				
Organic Baby Food	33.9	35.7	37.0	37.9	38.5
Organic Bakery Products	33.6	31.8	30.6	29.9	29.6
Organic Confectionery	4.4	4.1	4.0	3.9	3.8
Organic Dairy Products	*not calculable*				
Organic Ice Cream - '000 litres	5,947.6	5,697.8	5,477.3	5,359.6	5,302.8
Organic Oils and Fats	4.0	3.9	3.8	3.8	3.8
Organic Ready Meals	7.5	7.1	6.8	6.7	6.6
Organic Rice	1.7	1.7	1.7	1.7	1.8
Organic Sauces, Dressings and Condiments	5.3	4.9	4.7	4.5	4.5
Organic Snack Bars	0.6	0.6	0.6	0.6	0.6
Organic Soup	10.5	10.0	9.7	9.6	9.4
Organic Spreads	3.7	3.6	3.4	3.4	3.3
Organic Sweet and Savoury Snacks	4.0	3.8	3.7	3.6	3.6
Other Organic Food	14.5	13.9	13.3	13.0	12.8

Note: *the total retail volume of some categories cannot be calculated because products within those categories are quantified in different units of measure (e.g. litres versus tonnes).*
Source: *Euromonitor, Health and Wellness, 2011*

United Kingdom Organic Packaged Food Market Sizes
Forecast Period Growth based on Retail Volume in ’000 Tonnes

Categories	2010-15 Total %	2010-15 CAGR %
Organic	*not calculable*	
Organic Packaged Food	*not calculable*	
Organic Baby Food	20.7	3.8
Organic Bakery Products	-18.2	-3.9
Organic Confectionery	-17.0	-3.7
Organic Dairy Products	*not calculable*	
Organic Ice Cream - 000' litres	-14.9	-3.2
Organic Oils and Fats	-7.5	-1.5
Organic Ready Meals	-17.8	-3.9
Organic Rice	6.9	1.3
Organic Sauces, Dressings and Condiments	-21.0	-4.6
Organic Snack Bars	-1.9	-0.4
Organic Soup	-15.7	-3.4
Organic Spreads	-16.3	-3.5
Organic Sweet and Savoury Snacks	-13.2	-2.8
Other Organic Packaged Food	-16.9	-3.6

Note: *the total retail volume of some categories cannot be calculated because products within those categories are quantified in different units of measure (e.g. litres versus tonnes).*
Source: *Euromonitor, Health and Wellness, 2011*

PRICING

United Kingdom Organic Packaged Food – Average Unit Price Per Kilogram, by Category – Current Prices in $US – Fixed 2010 Exchange Rates

Categories	2005	2006	2007	2008	2009	2010
Organic Baby Food	8.4	8.4	8.5	8.6	8.9	9.1
Organic Bakery Products	3.5	3.7	4.0	4.5	4.8	5.1
Organic Confectionery	21.9	22.3	22.3	23.3	24.9	26.9
Organic Dairy Products	-	-	-	-	-	-
Organic Ice Cream (per litre)	8.1	8.2	9.0	9.4	9.7	9.9
Organic Oils and Fats	6.8	7.0	7.1	7.3	7.6	7.9
Organic Ready Meals	13.2	14.0	14.7	15.1	15.8	16.5
Organic Rice	6.2	6.4	6.5	6.6	6.9	7.3
Organic Sauces, Dressings and Condiments	3.0	3.7	4.3	4.9	5.3	5.7
Organic Snack Bars	15.3	15.1	15.0	14.9	14.8	14.8
Organic Soup	3.6	3.7	3.7	3.9	4.0	4.1
Organic Spreads	8.5	8.9	9.2	9.5	10.3	11.3
Organic Sweet and Savoury Snacks	19.9	20.0	20.1	20.1	19.9	20.0
Other Organic Packaged Food	6.2	6.4	6.5	6.6	6.8	7.0

Source: *Euromonitor, Health and Wellness, 2011*

PRODUCT AND INDUSTRY DEVELOPMENTS

- The organic industry achieved a major breakthrough in 2010, with the award of US$1.6 million from the E.U. to promote organic food and farming. The grant was matched by another US$1.6 million raised by more than 90 companies, and paves the way for an ultimate three-year advertising and public relations campaign valued at US$3.3 million, that started in January 2011. The new campaign, called "Why I love organic," aims to significantly increase sales of organic products from 2011 to 2014. Its main messages focus on four key benefits, emphasizing how organic farming is better for the environment (1) and animal welfare (2), while touting the great taste (3) and naturalness (4) of organic food products (Soil Association, 2011).

- Rachel's, an organic dairy company, claims over 30% of the U.K.'s organic yogurt market, growing some 20% over the past 12 months, significantly outperforming its competition. However, Rachel's products are said to be premium offerings, that capitalize not only on their organic make-up, but their great taste as well. Rachel's cites the female population between 25-54 years of age, as their target market.

- In mid-2010, Hain Celestial, a natural and organic products company, acquired Churchill Food Products, the manufacturer and distributor of Food-to-Go products in the U.K. Hain Celestial is looking to complement the company's Daily Bread brand, and develop exciting and healthy on-to-go products, utilizing Churchill's production capability.

- Dunham Group has launched a line of organic baby food called Baby Zilli (pictured at right). Varieties such as Tutti Fruity Mix, Blueberry Blast, Chicken and Parsnip, Rocket Fuel, and Potato and Lamb Stew hit the shelves in June 2011. The company is also launching a range of desserts with grown-up flavours like Berry Crumble and Fruit Medley, which were designed to appeal to multiple age ranges.

Source: *Mintel*

Source: *Mintel*

- Azada Organic has grown its line of extra virgin olive oil (pictured at left) with two new flavoured varieties, ginger and basil. Adding strong and pungent flavours to oil could open up new avenues of culinary experimentation for U.K. consumers.

- A new gender-oriented coffee beverage, Mount Elgon Gumutindo AA Roast and Ground Coffee, was recently released by Equal Exchange Organic. The product is sourced exclusively from co-ops farmed by women, in an effort to challenge mainstream fair trade (that does not always address gender inequality) and improve the status and capacity of independent female farmers. This nod to women is a claim that might resonate among ethically minded consumers.

- Energy gels are the emerging innovation in the energy products sector, and are evidence of the growing diversity of launches in the organic sector. Gel manufacturers are pushing the product as an alternative to the more common caffeine-laden drinks and shots. One such product is Mule Bar's Kicks Energy Gel (pictured at right), which is one of the latest product launches by Fuel for Adventure. The gel product is made from organic brown rice and agave syrups combined with Himalayan crystal salts.

- According to Datamonitor, there were 508 new organic products launched in the United Kingdom in 2010.

Source: *Mintel*

Top 10 New Organic Food Brands in the United Kingdom by Category, 2010

Brand	Baby Food	Dairy	Sauces & Seasonings	Processed Fish, Meat & Egg Products	Bakery	Sweet Spreads	Side Dishes	Soup	Fruit & Veg.	Chocolate Confect.
Duchy Originals from Waitrose	0	4	5	9	6	7	0	6	1	7
Fresh & Wild Organic Everyday Value	0	5	6	1	4	1	6	0	1	0
Baby Zilli	15	0	0	0	0	0	0	0	0	0
Plum Organic	13	0	0	0	0	0	0	0	0	0
Fresh & Wild Everyday Value	0	0	0	2	1	0	3	0	0	0
Asda Little Angels	12	0	0	0	0	0	0	0	0	0
Sainsbury's So Organic	0	2	3	0	1	1	0	1	2	0
Yeo Valley Organic Pots	0	10	0	0	0	0	0	0	0	0
Daylesford Organic	0	0	1	1	2	2	0	1	0	0
Tesco Organic	0	2	0	2	0	0	2	0	4	0

Source: *Datamonitor*

KEY ORGANIC MARKET SEGMENTS

Baby Food

- This category was valued at US$288.9 million in 2010, up from US262.8 million in 2009, recording a CAGR of 12.4% from 2005 to 2010. By the end of 2015, the organic baby food category is estimated to grow to US$374.4 million, with an expected CAGR of 5.3% from 2010 to 2015.

- The retail volume of this category totaled 31.9 thousand tonnes in 2010, up from 29.7 thousand tonnes in 2009, registering a CAGR of 10.6% from 2005 to 2010. The organic baby food market is expected to reach 38.5 thousand tonnes in 2015, with a forecast CAGR of 3.8% from 2010 to 2015.

- Hipp GmbH & Co Vertrieb KG's Hipp brand owned the leading market share with 37.7% in 2010, followed by "others" with 31.4%. Organix Brands Plc's Organix products garnered a 15.5% share, and Kella's Kitchen Ltd.'s Ella's Kitchen brand took 9.3% of the market over the same period. Plum Baby Ltd.'s Plum brand (3%), Boots Co. Plc's Boots product (2.3%), and Vitagermine SA's Babynat (0.7%), rounded out the category.

Bakery Products

- This category was valued at US$184.2 million in 2010, down from US$192.1 million in 2009, recording a CAGR of -0.7% from 2005 to 2010. By the end of 2015, the organic bakery products category is forecast to shrink to US$179.9 million, with an expected CAGR of -0.5% from 2010 to 2015.

- The retail volume of this category totaled 36.1 thousand tonnes in 2010, down from 39.8 thousand tonnes in 2009, registering a CAGR of -7.7% from 2005 to 2010. The organic bakery products market is expected to fall to 29.6 thousand tonnes in 2015, with a forecast CAGR of -3.9% from 2010 to 2015.

- Private label mastered the bakery products market in 2010 with a 41.6% share, followed by "others" with 33.4%. The remaining seven players in this category in 2010, were artisanal with 16%; Wetabix Ltd.'s Weetabix brand (3.9%); PepsiCo Inc.'s Quaker Oats brand (2%); Jordan Cereals Ltd. W's Crunchy brand (1.1%), and Jordan's brand (1.1%); Windmill Organics Ltd.'s Biona brand (0.5%); and Whole Earth Foods Ltd.'s Whole Earth brand (0.3%).

Confectionery

- This category was valued at US$124.4 million in 2010, up from US$123.7 million in 2009, recording a CAGR of 11.6% from 2005 to 2010. By the end of 2015, the organic confectionery category is estimated to grow to US$132.3 million, with an expected CAGR of 1.2% from 2010 to 2015.

- The retail volume of this category totaled 4.6 thousand tonnes in 2010, down from 5 thousand tonnes in 2009, registering a CAGR of 7.1% from 2005 to 2010. The organic confectionery market is expected to reach 3.8 thousand tonnes in 2015, with a forecast CAGR of -3.7% from 2010 to 2015.

Source: *Mintel*

- In 2010, the organic confectionery category saw Kraft Foods Inc.'s Green & Black's brand dominate the market with a 64.1% share. Private label took second place with a 26.5% share, followed by "others" with 6.3%. There were only two remaining players in this category: Traidcraft Plc's Traidcraft brand (1.9%), and Rococo Chocolates' Rococo Organic Artisan Bar (1.1%).

Dairy Products

- This category was valued at US$658.4 million in 2010, down from US$665.3 million in 2009, recording a CAGR of 13.7% from 2005 to 2010. By the end of 2015, the organic dairy products category is estimated to grow to US$692.8 million, with an expected CAGR of 1.0% from 2010 to 2015.

Source: *Mintel*

- The retail volume data for organic dairy is not calculable, due to the products in this category utilizing varying units of measure.

- The organic dairy products category was dominated by private label in 2010, with a 57.8% market share. “Others” owned the next largest portion of the market with 28.3%, followed by Yeo Valley Organic Co. Ltd.'s Yeo Valley brand (5.8%). The remaining market share was divided amongst Dean Foods Cop.'s Rachel's brand (4.4%), and their Alpro brand (2.7%); Plamil Foods Ltd.'s Plamil product (0.4%); Dairy Crest Group Plc's Country Life product (0.3%); Spiral Foods Pty Ltd.’s Bonsoy Soy Milk brand (0.2%); and Milk Link Ltd,’s Moo brand (0.2%).

Ice Cream

- This category was valued at US$61.4 million in 2010, slightly down from US$62.8 million in 2009, with a CAGR of 5.8% from 2005 to 2010. By the end of 2015, the organic ice cream market is expected to reach US$53.7 million in value, with a forecast CAGR of -2.7% from 2010 to 2015.

- The retail volume of this category totaled 6.2 million litres in 2010, with a CAGR of 1.8% from 2005 to 2010. Organic ice cream is expected to shrink to 5.3 million litres in 2015, with a CAGR of -3.2% from 2005 to 2010.

- In 2010, the organic ice cream category saw “others” leading in market share, with 56.9%. Private label (23.7%), Kraft Foods Inc.’s Breen & Black’s (11.8%), September Organic Dairy’s September Organic brand (3.0%), Yeo Valley Organic Co. Ltd.’s Yeo Valley brand (2.7%), and the Rocombe brand from Rocombe Fresh Ice Cream Ltd. (2.0%) represented the remaining market share.

Oils and Fats

- This category was valued at US$32.3 million in 2010, up from US$31.2 million in 2009, recording a CAGR of 11.9% from 2005 to 2010. By the end of 2015, the organic oils and fats category is estimated to grow to US$33.5 million in value, with an expected CAGR of 0.7% from 2010 to 2015.

- The retail volume of this category totaled 4.1 thousand tonnes in 2010, appearing unchanged from 2009. However, the category registered a CAGR of 8.7% from 2005 to 2010, so there was minimal growth. The organic oils and fats market is expected to shrink to 3.8 thousand tonnes in 2015, with a forecast CAGR of -1.5% from 2010 to 2015.

- In 2010, private label owned the largest market share in this category, with 62.8%. “Others” followed with a 22.4% share. Yeo Valley Organic Co. Ltd.’s Yeo Valley brand came in third place with 4.9%, and Dean Foods Co.’s Rachel’s brand was close behind with 4.1%. SALOV-Societa per Azioni Lucchese Olii e Vini SpA’s Filippo Berio brand had a 3.7% market share, followed by Napolina Ltd.’s Napolina brand (1.6%), SOS Corporacion Alimentaria SA’s Bertolli brand (0.5%), and Meridian Foods Ltd.’s Meridian brand (0.1%).

Ready Meals

- This category was valued at US$132.9 million in 2010, down from US$140.6 million in 2009, recording a CAGR of 3.8% from 2005 to 2010. By the end of 2015, the organic ready meals category is estimated to be worth US$126.8 million, recording an anticipated CAGR of -0.9% from 2010 to 2015.

- The retail volume of this category totaled 8 thousand tonnes in 2010, down from 8.9 thousand tonnes in 2009, registering a CAGR of -0.8% from 2005 to 2010. The organic ready meals market is expected to reach 6.6 thousand tonnes in 2015, with a forecast CAGR of -3.9% from 2010 to 2015.

- Private label ready meals were the category winners in terms of 2010 market share, with 52.2%. “Others” took second place with a 23.4% share, followed by Simply Organic Ltd.’s Simply Organic brand with 13.5%. Premier Foods Plc’s Cauldron brand rounded out the category in 2010 with a 10.9% market share.

Rice

- This category was valued at US$12.1 million in 2010, up from US$11.2 million in 2009, recording a CAGR of 8% from 2005 to 2010. By the end of 2015, the organic rice category is estimated to grow to US $15.6 million, with an expected CAGR of 5.2% from 2010 to 2015.

- The retail volume of this category totaled 1.7 thousand tonnes in 2010, up from 1.6 thousand tonnes in 2009, registering a CAGR of 4.5% from 2005 to 2010. The organic rice market is expected to reach 1.8 thousand tonnes in 2015, with a forecast CAGR of 1.3% from 2010 to 2015.

- Private label organic rice products had the largest market share in 2010, with 85.2%. Riso Gallo SpA’s Riso Gallo brand had an 8.3% share, with “others” rounding out the category with 6.6% in 2010.

Sauces, Dressings and Condiments

- This category was valued at US$32.3 million in 2010, down from US$32.8 million in 2009, recording a CAGR of 7.9% from 2005 to 2010. By the end of 2015, the organic sauces, dressings and condiments category is estimated to decline to US$29.7 million, with an expected CAGR of -1.7% from 2010 to 2015.

- The retail volume of this category totaled 5.6 thousand tonnes in 2010, down from 6.1 thousand tonnes in 2009, registering a CAGR of -5.1% from 2005 to 2010. The organic sauces, dressings and condiments category is expected to shrink to 4.5 **thousand** tonnes in 2015, with a forecast CAGR of -4.6% from 2010 to 2015.

- In 2010, Seeds of Change by Mars Inc. held the largest market share in this category, with 43.5%. Close behind was private label products with a 36.3% share, followed by Simply Organic Ltd.’s Simply Organic brand, with 14.9%. “Others” held last place in this category, with the remaining 5.4% market share in 2010.

***Source:** Mintel*

Snack Bars

- This category was valued at US$9 million in 2010, down slightly from US$9.1 million in 2009, recording a CAGR of -0.2% from 2005 to 2010. By the end of 2015, the organic snack bars category is estimated to be worth US$9.2 million, with an expected CAGR of 0.3% from 2010 to 2015.
- The retail volume of this category totaled 600 tonnes in 2010, relatively unchanged from 2009, registering a CAGR of 0.4% from 2005 to 2010. The organic snack bar market is expected to remain fairly stable at about 600 tonnes in 2015, with a forecast CAGR of -0.4% from 2010 to 2015.
- The market leaders in organic snack bars were “others” in 2010, with a 45.5% of market share. This was followed by Mars Inc.’s Seeds of Change brand with a 25.4% share, and private label with 22.6%. Doves Farm Foods Ltd.’s Doves Farm brand was last in the category, with 6.5% of the market.

Soup

- This category was valued at US$45.9 million in 2010, down from US$46.4 million in 2009, recording a CAGR of 3.7% from 2005 to 2010. By the end of 2015, the organic soup category is anticipated to shrink to US$44.8 million, with an expected CAGR of -0.5% from 2010 to 2015.
- The retail volume of this category totaled 11.1 thousand tonnes in 2010, down from 11.7 thousand tonnes in 2009, registering a CAGR of 1.0% from 2005 to 2010. The organic soup market is expected to decline to 9.4 thousand tonnes in 2015, with an anticipated CAGR of -3.4% from 2010 to 2015.
- "Others” took the lead in this category in 2010, with a 28.2% market share. Private label arrived in second place with 25.7%, followed by Simply Organic Ltd.’s Simply Organic brand (16.1%), Heinz Co’s HJ’s Heinz brand (14.2%), Geo Organic U.K. Ltd.’s Geo Organic brand (9.9%), and Mars Inc.’s Seeds of Change brand (5.9%).

Spreads

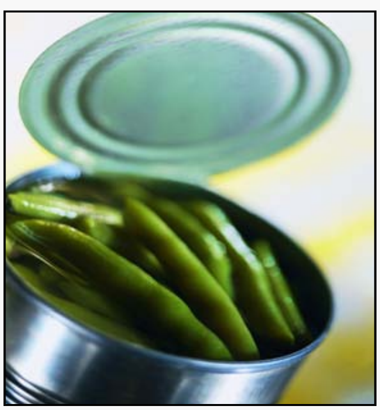
- This category was valued at US$44.8 million in 2010, up from US$44.1 million in 2009, recording a CAGR of 10.4% from 2005 to 2010. By the end of 2015, the organic spreads category is expected to be worth US$48.7 million, with a forecast CAGR of 1.7% from 2010 to 2015.
- The retail volume of this category totaled 4.0 thousand tonnes in 2010, down from 4.3 thousand tonnes in 2009, registering a CAGR of 4.2% from 2005 to 2010. The organic spreads market is expected to reach 3.3 million tonnes in 2015, with a forecast CAGR of -3.5% from 2010 to 2015.
- In 2010, top market share in the spreads category went to private label, with 53.4%. Holding second place, “others” garnered 29.7% of the market, while third place belonged to Rowse Honey Ltd,’s Rowse product, with 9.6%.

Sweet and Savoury Snacks

- This category was valued at US$83.3 million in 2010, down from US$88.1 million in 2009, recording a CAGR of -2.9% from 2005 to 2010. By the end of 2015, the organic sweet and savoury snacks category is anticipated to value US$76 million, with an expected CAGR of -1.8% from 2010 to 2015.
- The retail volume of this category totaled 4.2 thousand tonnes in 2010, down from 4.4 thousand tonnes in 2009, registering a CAGR of -3.1% from 2005 to 2010. The organic sweet and savoury snacks market is expected to total 3.6 thousand tonnes in 2015, with an anticipated CAGR of -2.8% from 2010 to 2015.
- In 2010, private label garnered the greatest market share in this category, with 76.9%. Second place belonged to “others” with a 17.3% share. Third place was assumed by Wessanen NV Koninklijke’s Kallo, owning 5% of the market.

Other Organic Packaged Food

- This category was valued at US$108.5 million in 2010, down from US$112.3 million in 2009, recording a CAGR of 2.6% from 2005 to 2010. By the end of 2015, the category is expected to be worth US$104.9 million, with an expected CAGR of -0.7% from 2010 to 2015.
- Within this category, 50% of 2010 sales were attributed to chilled processed food. Canned/preserved food, frozen food, and pasta each accounted for approximately 15% of sales, with noodles holding 1.6%.
- The retail volume of this category totaled 15.5 thousand tonnes in 2010, down from 16.6 thousand tonnes in 2009, registering a CAGR of 0.1% from 2005 to 2010. The other organic packaged food market is expected to reach 12.8 thousand tonnes in 2015, with an anticipated CAGR of -3.6% from 2010 to 2015.
- Both private label and “others” are the leaders in this market, with a combined 62.6% share. Heinz Co.’s HJ Heinz branded products captured a 14.2% share in 2010, and Pasta Lensi Ltd.’s Pasta Chef products owned 14.1%.



BUYERS AND DISTRIBUTORS

- There are approximately 43 buyers/distributors of organic products in the U.K., with a sample listing below. More detailed contact and product focus information, as well as a complete list of companies, can be found at www.thefoodworld.com.

United Kingdom—Organic Buyers/Distributors	
F.R. Benson & Partners Ltd.	Unit 15, Watford Metro Centre, Tolpits Lane, Watford, Herts WD1 8SS, Tel: +441923204500 Fax: +441923240569, email: sales@frbension.co.uk
Alara Wholefoods Ltd.	110-112 Camley Street, NW1 0PF London, United Kingdom, Tel: 020 7387 9303 Fax: 020 73886077
Baxters Food Group	Unit 1, Pegasus Way, Grimsby DN37 9TS Humberside, United Kingdom Tel: 01472 243600 Fax: 01472 243670
Clipper Teas Ltd.	Broadwindsor Road, DT8 3PR Beaminster United Kingdom, Tel: +44 (0) 1308 863344, Fax: +44 (0) 1308 863344
DragonFly Foods	Unit 2a, Mardle Way, TQ11 0NR Buckfastleigh, Devon, United Kingdom, Tel: +44 (0) 1364 642700, Fax: +44 (0) 1364 642700
Frozen Ingredients Ltd.	Blacksmiths Cottage NR 105AF Norwich, Norfolk United Kingdom, Tel: 01603279633 Fax: 01603279633
HS Bourne	The Bank, Malpas, SY 14 7AL Cheshire, United Kingdom, Tel: +44 (0) 1948 770214, Fax: +44 (0) 1948 770288
Kingston Foods Limited	Unit 2, Bradbourne Drive, Tillbrook, MK7 8AG Milton Keynes, Buckinghamshire, United Kingdom, Tel: +44 (0) 19080271010, Fax: +44 (0) 1908 271009
Lyme Regis Fine Foods Ltd.	Unit D, Station Industrial Estate, GU30 7DR Liphook, Hampshire, United Kingdom, Tel: 014287222900 Fax: 01428727222
Northumbrian Quality Meats Ltd.	Monkridge Hill Farm, NE48 7AD West Woodburn, Northumberland, United Kingdom, Tel: +44 (0) 1434 270184 Fax: +44 (0) 14340 270320
Principal Flavours Ltd.	Dalton House, 60 Windsor Ave., SW19 2RR London, United Kingdom, Tel:+44228540244 Fax: +448700638344
Real Organic Foods	Couching House,)X49 5PX Watlington, United Kingdom, Tel: +44 (0) 1491 615280, Fax: +44 (0) 1491 615289
The Big Squeeze Fresh Juice Company Ltd.	Bedfor Street, Woburn, Beds, United Kingdom Tel: +441908372121 Fax: +448704606218
The Herb Patch	Brockwell House, Newlands, DH8 9JA Ebchester, County Durham, United Kingdom, Tel: +44 (0) 1207 562099
Wyke Farms Ltd. White House Farm	Wyke Cahmpflower, Bruton, Somerset, United Kingdom, Tel: +44 (0) 17490812424, Fax: +44 (0) 17490813495

Source: *thefoodworld.com*

FOR MORE INFORMATION

KEY RESOURCES ON ORGANIC STANDARDS, REGULATIONS AND LABELLING

THE EUROPEAN UNION

The term 'organic' has a very specific meaning. It is written into E.U. regulations (EC) No 834/2007 and (EC) No 889/2008, which are minimum standards applicable across the E.U. These regulations came into force on 1 January 2009, and 2010 revisions under Regulation (EU) No 271/2010, came into effect in July 2010. Consult the full documents for more information.

(EC) No 834/2007
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF

(EC) No 889/2008
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:250:0001:0084:EN:PDF

(EU) No 271/2010
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:084:0019:0022:EN:PDF

THE UNITED KINGDOM

The Department for Environment, Food and Rural Affairs (DEFRA)
http://www.defra.gov.uk/

Organic Food Federation (the U.K.'s certification body)
http://www.orgfoodfed.com/

CANADA

Canadian Food Inspection Agency, Organic Product Regulations
http://www.inspection.gc.ca/english/fssa/orgbio/orgbioe.shtml

Canadian General Standards Board
Organic Production Systems - General Principles and Management Standards
http://www.tpsgc-pwgsc.gc.ca/ongc-cgsb/internet/bio-org/documents/032-0310-2008-eng.pdf

Organic Trade Association (North America)
http://www.ota.com

The Canadian Organic Trade Association
http://www.ota.com/otacanada.html)

Canadian Organic Growers
http://www.cog.ca/

Organic Agriculture Centre of Canada
http://www.organicagcentre.ca/

Organic Federation of Canada
http://www.organicfederation.ca/

KEY EVENTS

Organic Food Festival

Organized by Real Food Festivals, Ltd., "Organic Food Festival" took place September 3-4, 2011 in Bristol Harbourside, U.K.. It is one of Europe's premier organic events, with attendance at this year's show exceeding 20,000 visitors.
Website: www.organicfoodfestival.co.uk.
Contact: Louise Sweeney, Sales Director - louises@realfoodfestival.co.uk

Natural & Organic Products Europe

The Natural & Organic Products Europe (N.O.P.E.) annual trade show will be held April 1-2, 2012. N.O.P.E. is a major health and specialist food show in London, that attracted over 7,500 attendees and over 500 exhibitors in 2010.
Website: www.naturalproducts.co.uk

KEY CONTACTS

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RESOURCES

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Organic Monitor (2010). "The European Market for Organic Food and Drink."

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Soil Association (2011). "Organic Market Report 2011."

ANNEX: DEFINITIONS

Organic Packaged Food: This category includes food that is certified organic by an approved certification body, meaning the item has been grown according to strict uniform standards that are verified by independent state or private organizations. Depending on the country, such products are called ‘organic,’ ‘biological,’ or ‘ecological’. For organic products to be included under Euromonitor definitions, the organic aspect needs to form part of the positioning/marketing of the product.

The above definition of organic packaged food also applies to all categories listed below, unless otherwise stated.

Organic Baby Food: The aggregation of milk formula, prepared, dried and other baby food.

Organic Bakery Products: The aggregation of baked goods, biscuits and breakfast cereals.

Organic Confectionery: The aggregation of chocolate confectionery, sugar confectionery and gum. Note: Retail sales measurements are confined to packaged sales. However, exceptions are made for seasonal chocolate, where unpackaged/artisanal sales are included. Pick ‘n’ mix sales are also included. Sales from chocolatiers, typically displayed loose and later packed, are also included.

Organic Dairy Products: The aggregation of drinking milk products, cheese, yoghurt and sour milk drinks, and other dairy products.

Organic Ice Cream: The aggregation of impulse ice cream, take-home ice cream, frozen yogurt and artisanal ice cream. Note: Soy, oat, bean, and rice-based ice creams are included in dairy ice cream. Rice, soy, oats and beans (i.e.: red bean and mung bean ice cream products found in East Asia) can be used as dairy substitutes in the manufacture of ice cream, but the product is still equivalent in terms of positioning/marketing and consumer targeting to standard dairy ice cream.

Organic Oils and Fats: The aggregation of olive oil, vegetable and seed oil, cooking fats, butter, margarine, and spreadable oils and fats.

Organic Ready Meals: The aggregation of canned/preserved, frozen, dried, chilled ready meals, dinner mixes, frozen pizza, chilled pizza and prepared salads. Note: Ready meals are products that have had recipe "skills" added to them by the manufacturer, resulting in a high degree of readiness, completion and convenience. Ready meals are generally accepted to be complete meals that require few or no extra ingredients, however, in the case of canned/preserved ready meals, the term also encompasses meal centres; for dinner mixes, the term encompasses part meals. Some ready meals may require cooking; others may simply need reheating prior to serving.

Organic Sauces, Dressings and Condiments: The aggregation of tomato pastes and purees, bouillon/stock cubes, herbs and spices, monosodium glutamate (MSG), table sauces, soy based sauces, pasta sauces, wet/cooking sauces, dry sauces/powder mixes, ketchup, mayonnaise, mustard, salad dressings, vinaigrettes, dips, pickled products, and other sauces, dressings and condiments.

Organic Snack Bars: The aggregation of granola/muesli bars, breakfast bars, energy bars, fruit bars and other snack bars.

Organic Soup: The aggregation of canned/preserved, dehydrated, instant, chilled, UHT and frozen soup.

Organic Spreads: The aggregation of jams and preserves, honey, chocolate spreads, nut-based spreads, and yeast-based spreads.

Organic Sweet and Savoury Snacks: The aggregation of fruit snacks, chips/crisps, extruded snacks, tortilla/corn chips, popcorn, pretzels, nuts and other sweet and savoury snacks.

Other Organic Food: Includes canned/preserved food, chilled processed food, frozen processed food, noodles, and pasta.

Organic Packaged Food in the United Kingdom

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Ottawa, ON
Canada K1A 0C5
E-mail: infoservice@agr.gc.ca

Aussi disponible en français sous le titre :
Aliments biologiques emballés au Royaume-Uni

Canada