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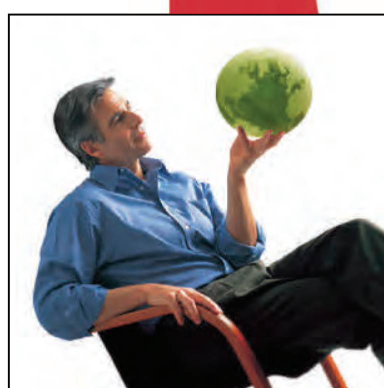
International Markets Bureau

MARKET ANALYSIS REPORT | APRIL 2013

Organic Packaged Food
in the United Kingdom



Source: *Shutterstock*

Growing Forward 2

Canada

MARKET SNAPSHOT

In 2012, sales of processed organic* products in the United Kingdom (U.K.) were worth US$1.88 billion. Sales had slowed during the economic downturn of 2008 to 2010, as consumers reduced their spending, which led retailers to reduce their organic ranges and shelf space.

Over 60% of the U.K.'s biggest organic brands are planning for growth in 2013. The Soil Association, a U.K.-based non-governmental organization dedicated to organic production practices, predicts an overall modest market expansion.

There are clear signs that the organic packaged food and drink market is being revived, with new product launches in 2012, suggesting that it will return to growth in 2013 and beyond, although the growth will be modest according to data from Euromonitor.

Organic food and drink continue to have a broad appeal. In 2012, eight out of ten British households (83%) bought organic products, according to the Soil Association report on the organic market in the U.K. (2012). On average, consumers bought organic products 13 times during 2012, compared to 14 times in 2010.

The appeal of organic products extends across the social spectrum, but a tough year economically has put a particular squeeze on lower-income households. According to Mintel, consumers with higher incomes accounted for 71% (estimate) of spending on organic products in 2012, compared to 67% in 2011. Groups such as pensioners, students and people on benefits, accounted for 29% of total spending on organic food, compared to 33% the previous year.

Despite a drop in the market, sales of organic food were still more than three times higher than those of ten years earlier and more than 50% higher than five years ago.

Standing out, the organic milk, baby food and home-cooking ingredients categories resisted the downward trend in sales, registering sales increases of 1%, 6.8% and 1.4%, respectively, from 2007-2011.

**The organic processed/packaged food category refers to 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, such as the Soil Association or the Organic Food Federation. This category includes such products as organic baby food, organic confectionery and organic bakery.*

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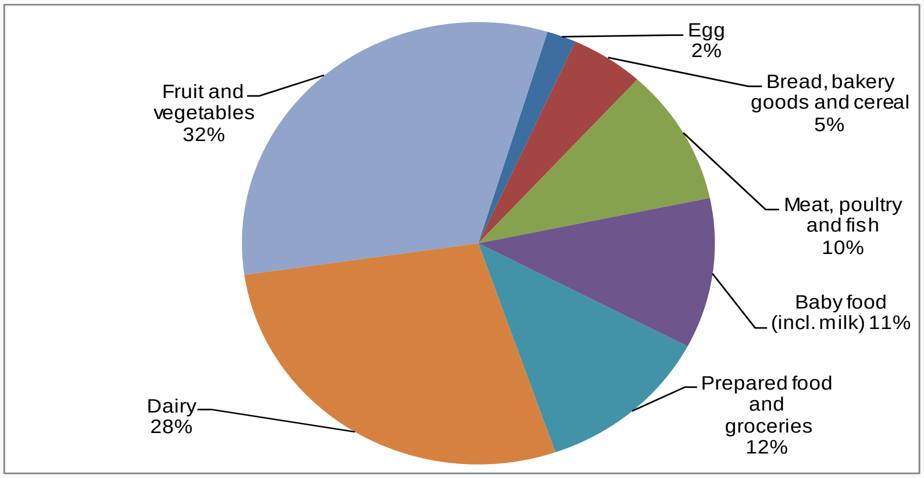
ORGANIC PACKAGED FOOD SALES

U.K. Retail Value Sales of Packaged Organic Foods by Category, 2012



***Source**: Mintel, 2013*

The organic food market stands out as one of the biggest casualties of the economic downturn in the U.K. Following years of dynamic growth, the market peaked in 2009, but the bubble quickly burst once the impact of the recession started to be felt by consumers. Positioned at higher price points, the organic label suddenly became a luxury that many cash-strapped consumers could no longer justify.

Organic products, which can simply be defined as products grown without the use of synthetic chemicals, are attractive to many consumers because of both their perceived and actual qualities. Organic food within the EU is strictly regulated. The EU sets the minimum standard for organic, but it can be certified by one of nine different "control bodies" in the U.K, all of which have their own set of rules. Most of the differences are quite small, but some are not. (Please refer to the list of control bodies at the end of this report.)

Any non-EU country or marketer of organic products that wants to label its products as organic in the U.K. must be registered with an approved organic control body and must be inspected at least once a year. Only then can its products be legally labelled and marketed as 'organic.' The following activities also require registration with an approved control body: producing or processing organic food or products, importing organic food or products from third countries (i.e. those outside the EU), producing organic animal feed, and re-labelling organic products at any stage of the distribution chain.

Consumers of organic food place significant value on food quality, nutrition, environmental sustainability and animal welfare. Fresh produce is the leading organic product category. Common items such as apples, oranges, carrots, and potatoes, for example, are typical entry points for consumers into the organic industry. In fact, fruit and vegetables and dairy represent the biggest value segments of the organic food market in the U.K., together accounting for 60% of every dollar spent on organic food in 2012.

U.K. Packaged Organic Food and Beverages Market Sizes, Historic/Forecast, Retail Sales in US$ millions

Category	2007	2008	2009	2010	2011	2012*	2013	2014	2015	2016	2017
Organic beverages	221.0	227.4	232.8	233.6	245.7	258.1	269.5	283.0	296.4	306.1	316.4
Organic packaged food	1,564.1	1,645.5	1,675.1	1,656.7	1,630.4	1,619.9	1,617.9	1,625.0	1,638.6	1,659.0	1,680.4
Total organic	1,785.1	1,872.9	1,907.9	1,890.2	1,876.1	1,878.0	1,887.4	1,908.0	1,935.0	1,965.1	1,996.8

***Source**: Euromonitor, 2012. *Note: 2012 data reflects part-year estimates.*

▶ CONSUMER TRENDS

Although the organic packaged food market is down slightly in the U.K., some interesting trends and patterns are emerging, which may reflect a cultural shift in some consumer shopping habits.

Organic food products continue to be purchased by a much broader demographic than one might expect, given the traditional image of "organic buyers" that has grown in the popular imagination. In fact, eight out of ten households bought some organic items in 2012 (Soil Association, 2012).

***Source**: Mintel, 2013*

Sales of organic packaged food through traditional channels (eg: supermarkets) fell in 2012. On the other hand, home delivery and mail order increased, a sign that devoted organic shoppers looked increasingly to speciality retailers, as supermarkets reduced the availability and selection of organic products.

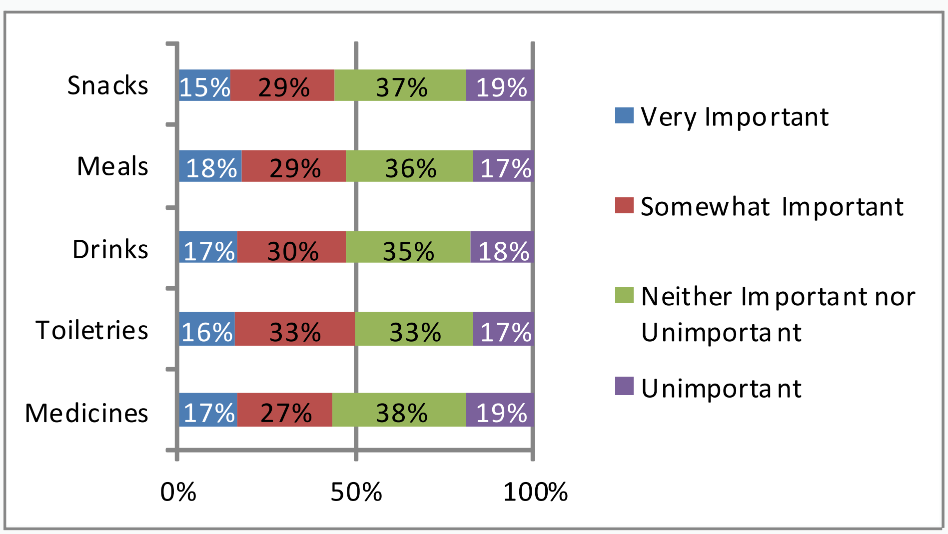
Perhaps in response to multiple retailers decreasing the range of organic products available, many farm shops and other independent speciality retailers are remaining optimistic about organic sales growth.

Following a number of alerts, more inspections of pesticide residue resulted in an increase in incidents involving the use of pesticides illegal in the U.K and European Union, with 102 in 2011, compared to 55 in 2010. These fears could drive some consumers to natural and organic alternatives, which tend to be perceived as purer and safer than heavily processed foods.

British parents are also eager to buy into the purity and premiumization of products for their children, especially when it comes to organic foods.

The following graph illustrates the importance that parents attribute to buying products they consider safe for their children to consume. This concern is especially evident when it comes to things that directly affect the human body, such as toiletries, meals, snacks, drinks, and medicines according to a Mintel survey (2012).

U.K. Consumer Attitude Toward Children's Consumables, 2012



***Source**: Mintel, 2013*

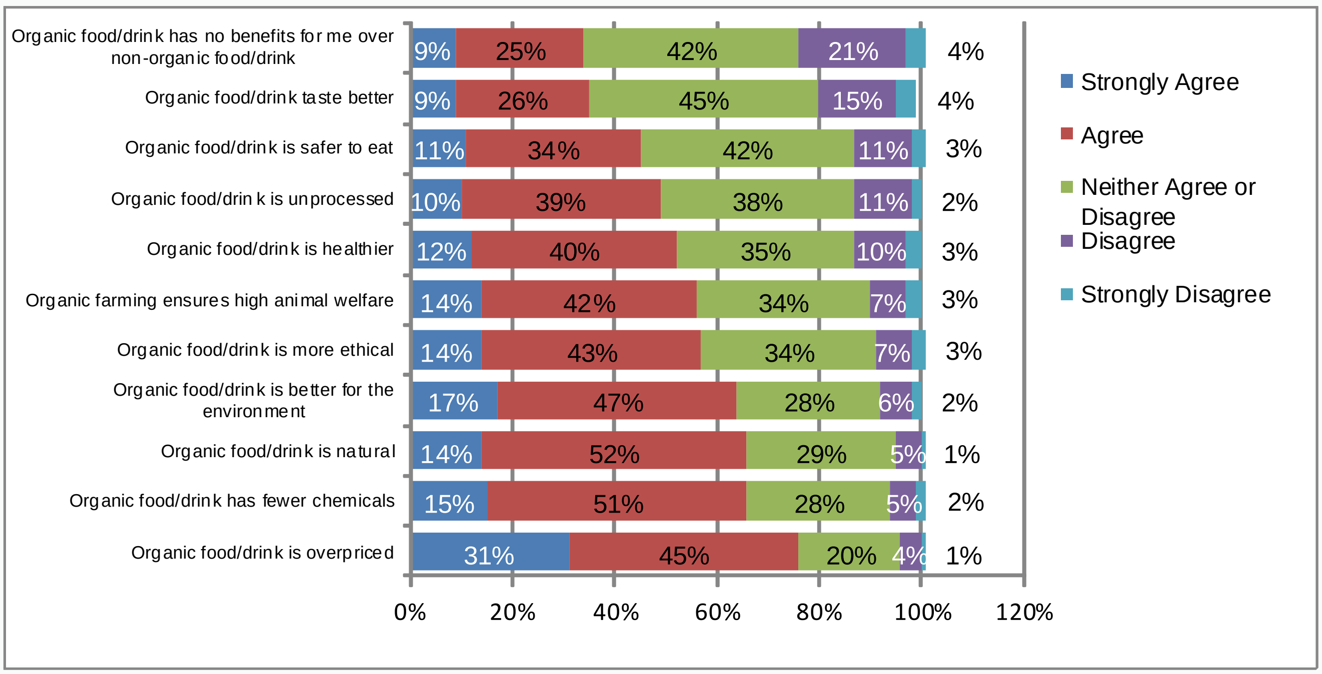
CONSUMER TRENDS (continued)

Britons are currently eating out more frequently than they were years ago. IGD estimates that 33% eat out once a week or more, compared to only 13% in 2005. About 3 million meals are eaten at work every day, of which two million are prepared by contracted catering services. The restaurant and catering sector, an area in which organic products have not been well represented in the past, has seen positive growth since 2010. Notable successes in 2011 included an increased take-up of organic food in schools, nurseries and hospitals, thanks to initiatives like celebrity chef Jamie Oliver's television show promoting fresh, local and organic ingredients and his campaign for healthier school lunches.

However, British market operators are mostly concerned with what will be the next big trend in the U.K. Organic and localization trends are increasingly important, but the media may overstate their impact. With the E.U. population expanding, food from Eastern Europe or Asia may begin to influence the U.K. Examining the next wave of immigration may be useful in identifying opportunities to link organic products and ethnic food flavours.

A Mintel survey from July 2012 asked 2,000 respondents over the age of 16 about their perceptions of organic foods and what factors weigh into their decision to purchase organic versus non-organic foods. Despite some of the positive perceptions of organic food that the survey revealed, it found that the organic label still suffers from a perception of being overpriced.

Mintel Survey Findings: Differences between Organic and Non-Organic Food and Drink, July 2012

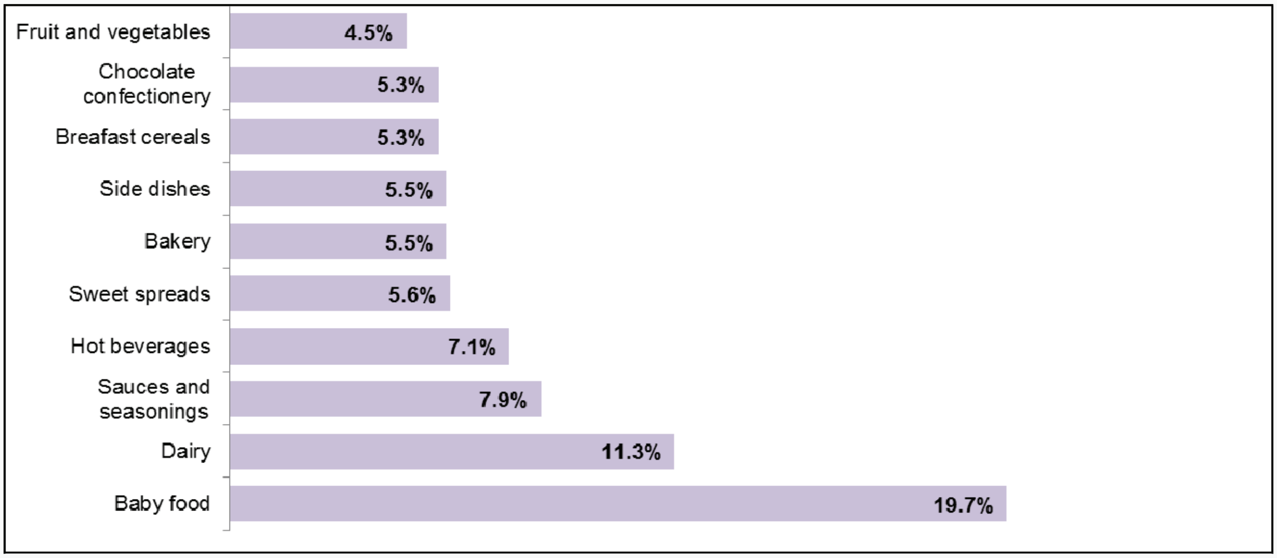


***Source**: Mintel, 2013*

The same Mintel survey also revealed that many British consumers see the term *organic* as vague and confusing, as it spans a diversity of issues and lacks one strong focal message. The survey concluded that the organic market needs to clearly communicate its tangible benefits to consumers in order to overturn the damaging perception that organic food is overpriced or merely a fashion statement for the exclusive few who can afford it. It also needs to engage with British consumers on an emotional level if it is to compete with other ethical foods such as *free-range* or *fair trade*, which currently resonate more strongly with shoppers.

MARKET TRENDS

Share of New Launches of Organic Products by Major Categories, 2012



Source: *Mintel, 2013*

Despite trading down in other areas of their grocery lists, parents are unwilling to compromise on the food they give to their babies and toddlers. There remains strong demand for organic baby food, which a large minority of parents with young children trust to be healthier and safer than similar non-organic products.

According to Mintel, retail value sales of organic baby food (including milk) rose an impressive 14%. The organic baby food category also enjoyed strong volume growth of 27% between 2008 and 2012, defying the trend of falling sales in other organic food sub-categories.

In a bid to build awareness of the benefits of organic food and drink, and extend organic's appeal to a wider range of consumers, the U.K.'s Organic Trade Board launched the market's first-ever, industry-wide advertising campaign in 2011. The three-year action plan focuses on four key messages: *great tasting food; better for nature; better for animal welfare; and more natural food.*

The Organic Trade Board launched its second-year consumer campaign in March 2012, with the tagline: *Organic. Naturally Different*. It is supported by a combination of digital advertising, social media and public relations presences.

Retailers are also increasing their consumer awareness campaigns. Planet Organic, for example, holds monthly, in-store talks by local therapists and health experts, an approach also adopted by Nature's Corner, which sends monthly newsletters and holds in-store events.

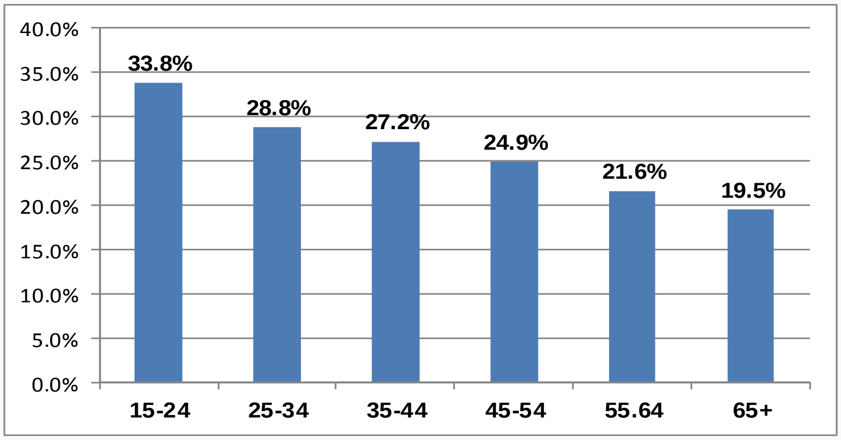
Holland & Barrett, for example, have incorporated a new concept into their stores. Surfing on the wave of popularity enjoyed by whole food and health stores, they have positioned themselves not just as stores, but also as experts in their field of well-being.

This positioning of health food stores as overall well-being experts could perhaps be developed even further to bring together organic, health food, and well-being services.

CONSUMER SEGMENTATION

A Target Group Index (TGI) survey of about 25,000 people in the U.K. asked respondents from different age groups whether they agreed with the following statement: It's worth paying more for organic food.

TGI Survey on Organic Food Consumption:
"It's worth paying more for organic food," by Age Group, 2012



Source*: Mintel, 2013*

Source*: Mintel, 2013*

It is well established that the British population is aging, with the number of adults aged 55 years and older projected to increase by 9% by 2020, or 19.7 million people. This makes older Britons an increasingly important demographic for any sector to consider. Given that these consumers have the lowest usage of organic food and drink products, and are the most skeptical of organic claims, this trend will hinder the market. However, there remains a substantial growth opportunity among this fast-growing segment of the population if they can be convinced of the benefit of organic products.

In 2012, about one quarter of all British consumers believed it is worth paying more for organic food; this number increased to 33.8% for the 15-24 age group and dropped to 19.5% for the 65+ age group, according to the above-noted TGI survey.

The survey concluded that fewer consumers believed it was worth paying more for organic food in 2012 than at any time in at least the previous four years. Further analysis concluded that this pattern is tied with increasing pressure on household budgets, which has seen consumers reassessing spending priorities. Seen most commonly as a discretionary item, organic food has found itself among the most likely items to be cut back.

All age groups recognize and are aware that organic food and drink are more expensive because of their smaller scale of production compared to conventional, large-scale, farmed produce, with the smaller scale also affecting processing and transportation costs. Additionally, consumers from all groups recognize that organic farming is more labour and management intensive. These factors make it difficult for operators to keep prices competitive.

Nevertheless, all age groups, while motivated differently, need a strong incentive to pay more for organic products. This highlights the importance of educating consumers on the tangible benefits of organic food and drink products, particularly older consumers, who are still skeptical of the benefits of organic food and drink products.

It is vital to justify the cost of organic products and to show their tangible benefits to consumers. To do so, manufacturers must first determine the key motivators for each age group and use this information to target them with relevant messages and marketing tools.

Source*: Mintel, 2013*

CONSUMER SEGMENTATION (continued)

TGI Survey on Organic Food Consumption:
Agreement with Selected Lifestyle Statements, 2008-2012

Statement	2008	2009	2010	2011	2012	Change From 2008
It's worth paying more for organic food	30.7%	28.5%	26.5%	25.7%	23.5%	-7.2%
I buy free-range products wherever I can	42.3%	43.2%	43.6%	43.1%	41.1%	-1.2%
I pay attention to where the products I purchase are made/grown	38.1%	34.6%	34.0%	41.6%	41.3%	3.2%
I would never buy food that has been genetically modified	33.6%	31.1%	29.4%	29.3%	29.6%	-4.0%
I am prepared to pay more for foods that don't contain artificial additives	43.0%	37.3%	34.7%	30.6%	29.6%	-13.4%
It's worth paying extra for quality goods	68.0%	66.5%	65.4%	59.7%	60.4%	-7.6%
I only buy products from a company with whose ethics I agree	19.1%	18.4%	17.5%	16.6%	15.7%	-3.5%

***Source**: Mintel, 2013*

The anticipated decline in the number of consumers under the age of 25 is a cause for concern, as these upcoming consumers, despite their more limited spending potential, purchase most of organic packaged food and organic fresh produce.

However, countering this, the number of 25-34-year-olds is set to grow by 9% between 2012 and 2017, when they will account for 14% of the population. These consumers are also ardent consumers of organic produce and have greater spending power than their younger counterparts.

***Source**: Planet Retail, 2013*

DISTRIBUTION CHANNELS

U.K. Retail Value Sales of Organic Food and Drink, Market Share by Outlet Type, in Percentage, 2009-2011

Outlet	2009	2010	2011
Supermarkets/hypermarkets	80%	79%	78%
Independent retailers	10%	10%	10%
Box schemes/online*	8%	9%	10%
Farmers' markets	2%	2%	2%
Total	100%	100%	100%

Source: *Euromonitor, 2013*
**A box scheme is a delivery of fresh produce usually locally grown and organic, either directly to the customer or to a local collection point.*

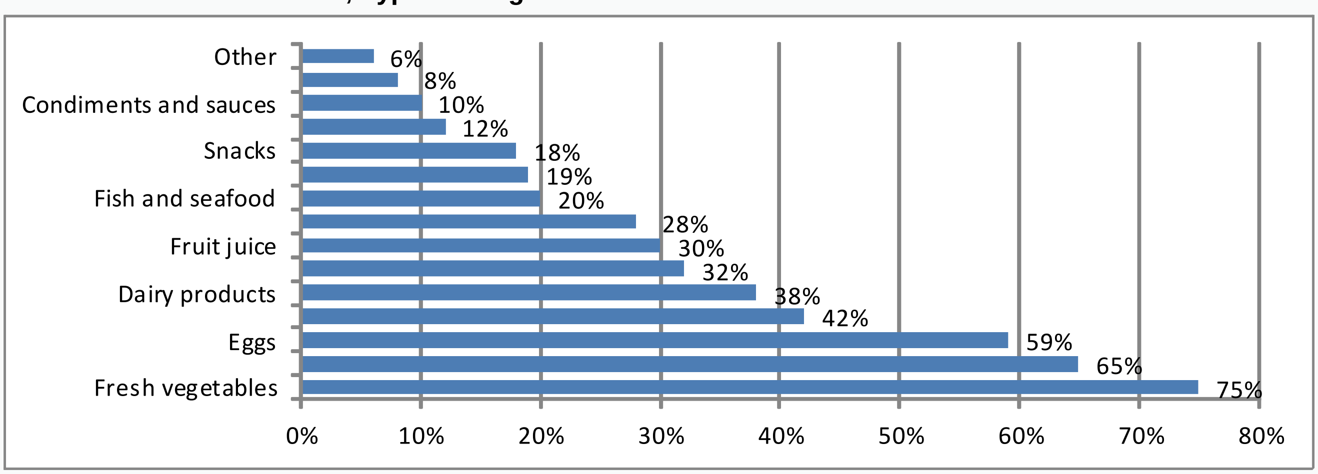
Tesco, Sainsbury's, Asda (Walmart) and Morrisons form the driving force within the grocery retail channel in the U.K. Combined, they account for 78% of organic food sales, according to Mintel. These retailers dominate the overall organic food market by leveraging a hefty portion of advertising and promotional activity. Despite these efforts, their share of the organic market fell significantly (down 12% from 2010 to 2011), as organic sales declined overall.

Independent retailers also struggled during the economic downturn, but not as much as the big supermarkets/ hypermarkets. Overall, they managed to maintained their market share. The National Farmers Retail and Markets Association (FARMA) states that there are over 1,000 farm shops in the U.K. selling locally produced food directly to the public.

Meanwhile, home delivery of fresh produce, known as a vegetable box scheme, actually saw some growth. Box schemes involve the delivery of fresh, locally grown, organic vegetables, either directly to the customer, to a local collection point, or by mail order. These outlets recorded healthy growth of 4% in sales in 2012. They now account for a tenth of the total value of the organic food and drink market in the U.K.

Players in the box schemes segment, such as Abel & Cole and Riverford Organic, have extended their dominance within the vegetable box market, having both posted impressive sales increases in 2011. It is reported that Abel & Cole attracted 29% more customers in 2011 than in 2010 and delivers to approximately 40,000 households every week. This growth was fuelled by the biggest players in the box scheme market, in particular Ocado and Online Grocer, which continue to strengthen in terms of growing their overall sales. The Online Grocer carries over 1,500 organic lines and has ties with leading organic producers Daylesford and Laverstock Park.

U.K., Types of Organic Food and Drink Purchased in 2012.



Source*: Mintel, 2013*

DISTRIBUTION CHANNELS (continued)

It is important to note that, within the British market, there has been some confusion among consumers between foods that are marketed as *all natural* versus those labelled *organic,* with some consumers using the terms interchangeably. Noting this misperception, some traditional grocery retailers are moving away from organics in favour of the all natural segment, as production in this segment tends to be easier and less expensive. In general, all-natural foods are minimally processed and do not include ingredients such as refined sugar, refined flour, milled grains, artificial sweeteners, artificial colors, artificial flavorings, or hydrogenated oils — but they are not necessarily organic. By contrast, organic products are held to standards set out by a certification body. Organic produce must be grown without man-made pesticides, insecticides, and herbicides, and organic meat and dairy comes from livestock fed an organic diet and reared without antibiotics and growth hormones. Additionally, in order to be considered organic, produce and livestock must not be genetically modified.

Given this context, Waitrose, a well-known name on the British grocery scene, has set out to differentiate itself by seriously investing in and promoting its organic ranges. It now has more than 150 products available in its "Duchy Originals" organic range. Having attracted a more upmarket clientele than many of the other major grocers, Waitrose is well positioned to profit by expanding its ranges of premium products, which includes organic food and drink.

Taking a different approach, The People's Supermarket, a new entrant into the organic scene in London, is a sustainable food cooperative that responds to the needs of the local community and provides healthy, local food at reasonable prices. This new co-operative supermarket uses cutting-edge branding and media engagement to attract shoppers looking for a different retail experience.

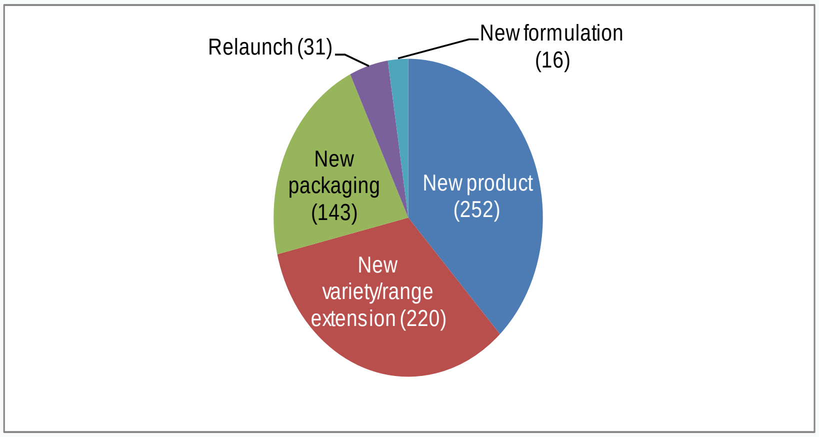
The strategy of this new entrant is to address consumer demand for quality, low-cost brands that are sustainably produced and sourced. The store also sells packaged, branded food to ensure that members can meet all of their shopping needs in one location, putting itself in position to take advantage of both ethical and boutique trends.

These developments in the British organic market present opportunities for manufacturers to provide information on organic products, to conduct market research and to educate consumers and industry alike. Showcasing the benefits of organic products, specifically with regards to their advantages over all natural products, is key to stimulating growth in the U.K market.

Source: *Planet Retail, 2013*

NEW PRODUCTS

U.K., Organic Food and Drink, New Product Launches, January 2012-December 2012



***Source**: Mintel, 2013*

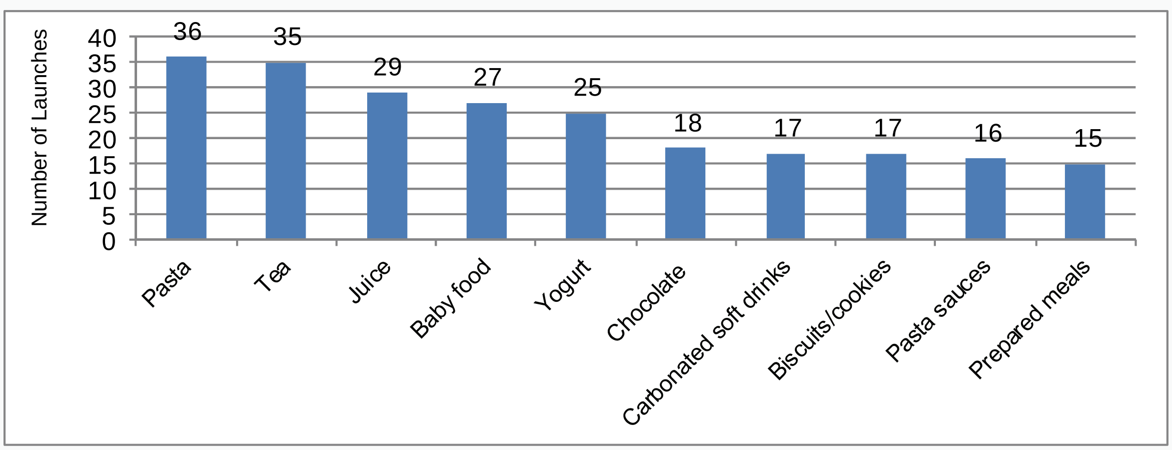
Top Five Claims for Organic Food and Drink New Product Launches (2012)	
Organic	504
Vegetarian	215
Ethical - environmentally friendly package	188
No additives/preservatives	179
Low/no/reduced allergen	156

***Source**: Mintel, 2013*

Given the dominance of supermarkets/hypermarkets and the strong market share of private label products within the packaged food segment, branded products are constantly challenged to add value through a variety of means, including new packaging solutions, premium ingredients, provenance, and health and wellness attributes, as well as ethical positioning, such as fair trade accreditation. A fierce rivalry is on the horizon with strong price competition from private label products, mimicking both the packaging and premium content of branded products, including organic certification.

Taking advantage of their dominance, retailers like Tesco are implementing strategies whereby they offer a range of organic products that fit within private label lines. By so doing, they meet the needs of consumers shopping in the economy/mid-price segment, as well as the premium segment, and thereby limit the number of brands they stock, giving their own organic private label products greater shelf space. In this way, organic products will become more accessible and more affordable to consumers, and expanding demand will put pressure on suppliers to reduce cost.

U.K. Organic Food and Drink, Number of New Product Launches by Sub-Category, January 2012-December 2012



***Source**: Mintel, 2013*

NEW PRODUCTS (continued)

New Product Examples: Organic Baby Food

Parents spare very little when it comes to the needs of their children. Despite the overall negative growth in the organic food sector, organic baby food has emerged without a scratch, as parents continue to spend on premium and less-processed foods for their offspring. The products above, Organix cottage pie with butternut squash, Plum banana and apricot oat porridge and Ella's kitchen spaghetti bowl are made with natural, organic ingredients and are free from gluten, and dairy. They also contain no ingredients such as, salt, sugar, preservatives or artificial additives. Retail prices vary from US$1.99 to US$3.35.

Other New Product Examples

The label on this Meridian Organic Mince Pie Filling claims that it is made from natural sources of dietary nutrition and can help to contribute to a healthier lifestyle. It contains only natural, high-quality and traceable organic ingredients. This product retails for US$4.75 at Waitrose supermarket.

Asda (Walmart) Chosen By You Organic Mixed Beans in water claims that it is high in fibre, which helps the digestive system. This microwaveable product is suitable for vegetarians and retails in a 400 g recyclable can for US$0.99.

The new packaging of Scheckter's Organic Energy Sparkling Organic Fruit Juice Drink with Guarana, claims to contain organic Brazilian guarana, organic pomegranate, organic Chinese ginseng, and organic green tea, and is said to be free from synthetic caffeine, artificial sweeteners, artificial colours, or added preservatives. This product is 100% natural, and retails for US$3.50 in a 250 ml recyclable pack featuring the Fairtrade logo and the Organic Soil Association logo.

***Source for all**: Mintel, 2013*

RESOURCES

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FOR MORE INFORMATION

For more information on organic products and labelling standards, please consult the following publications from Agriculture and Agri-Food Canada, or any of the resources listed below:

- Market Trends: Organics. http://www.ats-sea.agr.gc.ca/inter/5619-eng.htm
- Food Labels in Europe. Changes to E.U. Labelling Regulations and New Eco-Labels in France: *http://www.ats-sea.agr.gc.ca/eur/5646-eng.htm*
- Market Briefing: Food Information and Labelling in the European Union, *http://www.ats-sea.agr.gc.ca/eur/5980-eng.htm*

Key Resources on Organic Standards, Regulations, and Labelling	
European Union	**The regulations surrounding food labelling in the E.U. are currently under review, and may be subject to further amendments. For more detailed information, or the latest updates, please consult the following resources:* **The European Commission** http://ec.europa.eu/food/food/labellingnutrition/nutritionlabel/index_en.htm **The European Food Information Council** http://www.eufic.org/article/en/health-and-lifestyle/food-choice/artid/Nutrition-labelling-how-where-and-why/
International	**International Federation of Organic Agriculture Movements** http://www.ifoam.org/about_ifoam/standards/index.html
Canada	**Canadian Food Inspection Agency, Organic Product Regulations** http://www.inspection.gc.ca/english/fssa/orgbio/orgbioe.shtml

FOR MORE INFORMATION (continued)

The following organizations are organic control bodies that are active in the U.K.

Name	Code	Address	Phone/Fax	Email
Organic Farmers and Growers Ltd	UK2	The Old Estate Yard Shrewsbury Road Albrighton Shrewsbury Shropshire SY4 3AG	Tel: 01939 291800 Fax: 01939 291250	Email: info@organicfarmers.org.uk Website: www.organicfarmers.org.uk
Scottish Organic Producers Association	UK3	Scottish Food Quality Certification (SFQC) 10th Avenue Royal Highland Centre Ingliston Edinburgh	**Support and Development:** Tel: 0131 335 6619 Fax: 0131 335 6601 **Certification:** Tel: 0131 335 6606	Email: deborah.roberts@sfqc.co.uk info@sopa.org.uk Website: www.sopa.org.uk
Organic Food Federation	UK4	31 Turbine Way Eco Tech Business Park Swaffham Norfolk PE37 7XD	Tel: 01760 720444 Fax: 01760 720790	Email: info@orgfoodfed.com Website: www.orgfoodfed.com
Soil Association Certification Ltd	UK5	South Plaza Marlborough Street Bristol BS1 3NX	**Farmers and growers:** Tel: 0117 914 2412 Fax: 0117 314 5046 **Processors:** Tel: 0117 914 2407 Fax: 0117 314 5001	Email: **Farmers and growers** prod.cert@soilassociation.org **Processors** proc.cert@soilassociation.org Website: www.soilassociation.org/certification

Source: *www.gov.uk/organic-certification-and-standards*

FOR MORE INFORMATION (continued)

Biodynamic Agricultural Association	UK6	BDAA Demeter Administrator 2 Upper Grange Lovedays Mead Stroud Glos GL5 1XB	Tel/Fax: 01453 766296	Email: demeter@biodynamic.org.uk Website: www.biodynamic.org.uk
Irish Organic Farmers and Growers Association	UK7	Main Street Newtownforbes Co. Longford Republic of Ireland	Tel: (+353) 043 42495 Fax: (+353)043 42496	Email: info@iofga.org
Organic Trust Limited	UK9	Vernon House 2 Vernon Avenue Clontarf Dublin 3 Republic of Ireland	Tel: 00 353 185 30271 Fax: 00 353 185 30271	Email: organic@iol.ie Website: www.organic-trust.org
Quality Welsh Food Certification Ltd	UK13	Gorseland, North Road, Aberystwyth, Ceredigion SY23 2WB	Tel: 01970 636688 Fax: 01970 624049	Email: mossj@wfsagri.net Website: www.wlbp.co.uk/organic_overview
Ascisco Ltd	UK15	South Plaza Marlborough Street Bristol BS1 3NX	**Farmers and growers:** Tel: 0117 914 2406 **Processors:** Tel: 0117 914 2407 Fax: 0117 925 2504	Email: hbrooke@soilassociation.org Website: www.soilassociation.org/certification

Source: *www.gov.uk/organic-certification-and-standards*

Organic Packaged Food in the United Kingdom

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

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