



North East Organic Discussion Group

Organic Sector Update with SOPA

16th Feb 2026

Jo Barron

Scottish Organic Producers Association – Leading Scottish Organics



Organic Topics

- Organic Statistics
- Organic Commodities
- Organic Funding & budget
- Organic Policy & schemes
- Organic Action Plan
- SOPA support & events

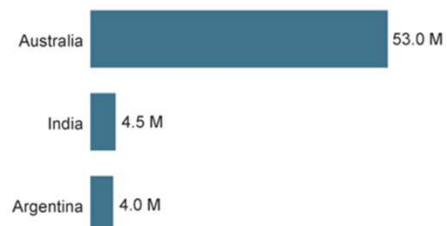
Discussion & questions welcome

Organic Agriculture Worldwide 2023

Organic Farmland



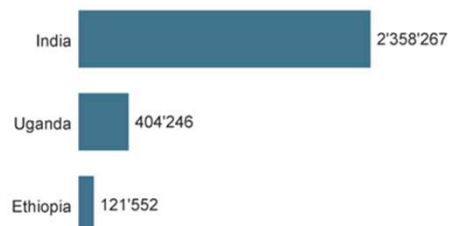
Farmland in million (M) hectares Top 3 countries



Organic Operators



Number of producers Top 3 countries

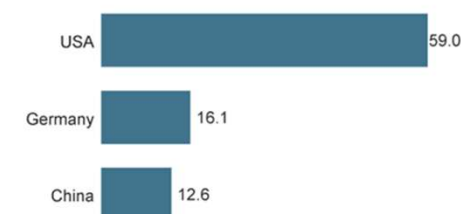


Organic Market

The global market is growing and consumer demand is increasing



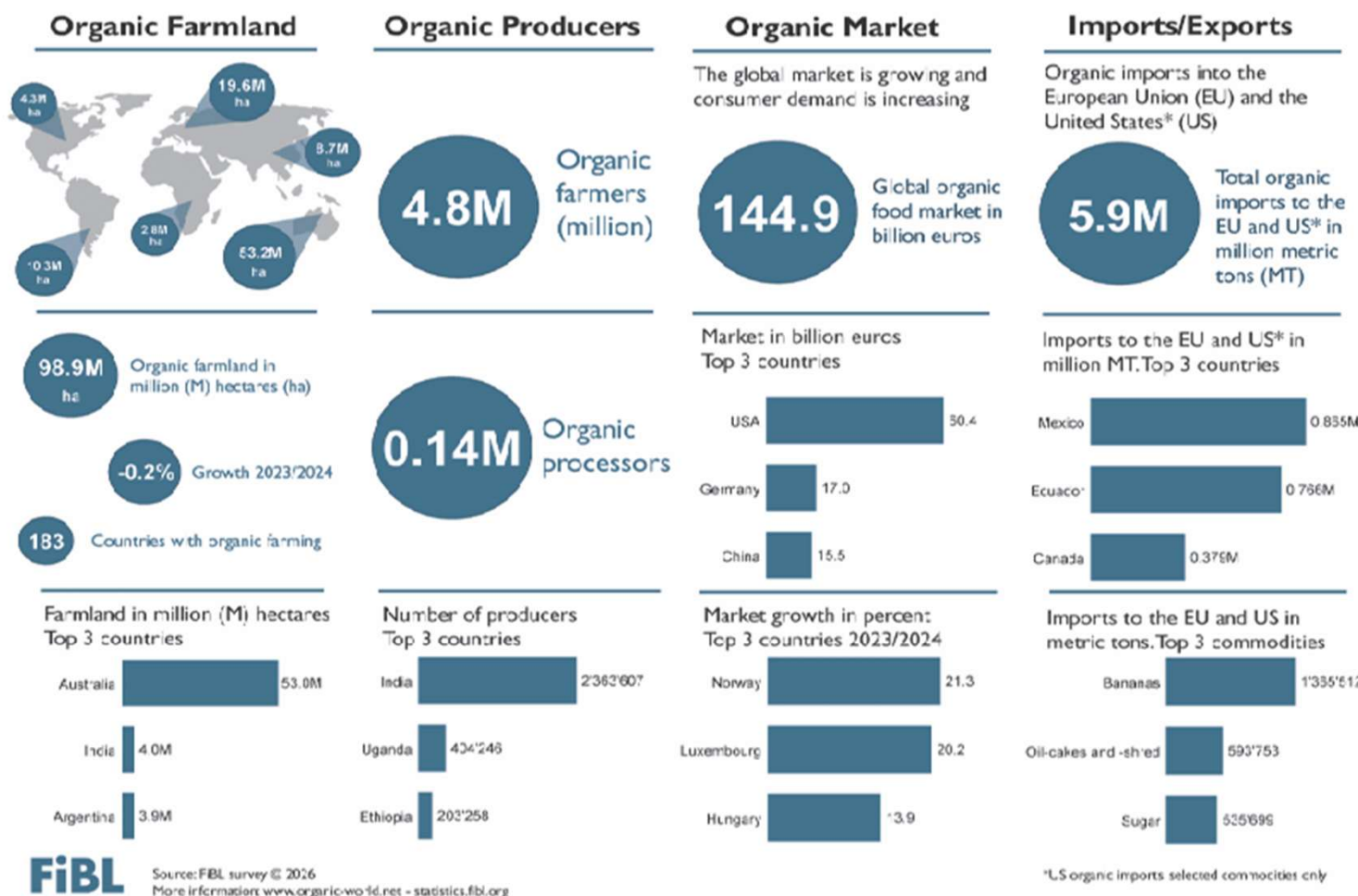
Market in billion euros Top 3 countries



Market growth in percent Top 3 countries 2022/2023



Organic Agriculture Worldwide 2024

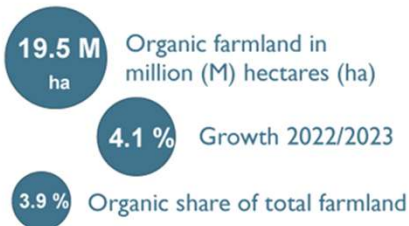


Infographic 1: Organic agriculture worldwide - key indicators 2024

Source: FiBL survey 2026

Organic Agriculture in Europe 2023

Organic Farmland



Farmland in million (M) hectares Top 3 countries

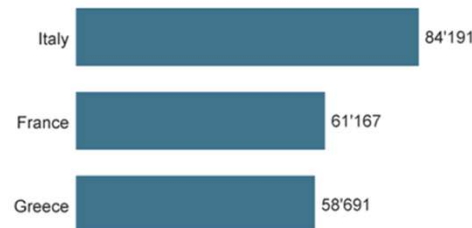


Organic Producers

The number of organic producers is increasing



Number of producers Top 3 countries

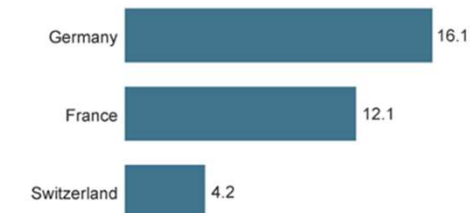


Organic Market

The European market increased slightly in 2022/2023



Market in billion euros Top 3 countries



Market growth in percent Top 3 countries 2022/2023



Organic Agriculture in Europe 2024

Organic Farmland



Farmland in million (M) hectares Top 3 countries



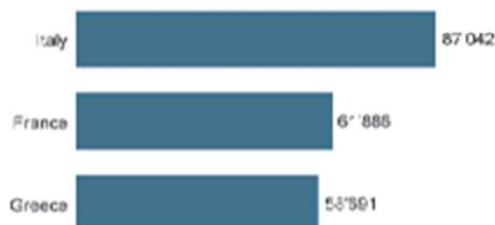
Organic Producers

The number of organic producers remains stable

490'637 Organic producers

93'978 Organic processors

Number of producers Top 3 countries

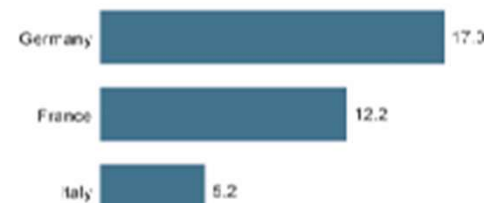


Organic Market

The European market increased slightly in 2023/2024



Market in billion euros Top 3 countries



Market growth in percent Top 3 countries 2023/2024



Europe



Europe: Organic share of total agricultural land
More than 0%  More than 20%

Organic Agriculture in UK & Scotland 2023

- Almost 500 thousand ha farmed organically in UK:
 - Just over 460 thousand ha fully organic land and
 - 36 thousand ha in-conversion
- Overall decrease of 2.1% compared to 2022
- **Scotland bucked the trend - 11.8% increase** from 92,500 hectares to 103,500 hectares.
- 3,193 Organic producers in the UK of which 379 in Scotland.
- Permanent pasture & rough grazing account for 62%, temporary grass (18%) and cereals (10%).
- Organic market held strong, growing 2% to reach £3.2 billion.

Europe



Europe: Organic share of total agricultural land

More than 0%  More than 20%

Organic Agriculture in UK & Scotland 2024

- Over 500 thousand ha farmed organically in UK:
 - 503 thousand ha fully organic land and
 - 49 thousand ha in-conversion
 - 3% of total agricultural area
 - UK 59% of UK organic land was in England, 26% in Scotland, 14% in Wales and 1.4% in NI.
- **Scotland rise of 13%** from 103,500 to 132,000 ha.
- 3,118 Organic producers in the UK (1788 processors, 277 producers and processors).
- 389 producers (126 processors, 15 producers and processors) in Scotland.
- Permanent pasture & rough grazing account for 62%, temporary grass (18%) and cereals (10%).
- Organic market held strong, growing to reach £3.7 billion.

[Organic farming statistics 2024: United Kingdom - GOV.UK](#)

Organic Livestock

- Organic Cattle

- Demand for both prime & store (some supermarkets looking to increase 20%)
- Steady premium but also high price for non-organic at present

- Organic Sheep

- Premium for prime lamb
- Market for organic cull ewes fortnightly
- Premium for most grades of organic wool

- Dairy & Laying Poultry

- Organic eggs in short supply
- Depending on location and logistics, stable growth in demand for organic milk

Organic Cereal & Pulses

- Growing to match demand is key
 - Organic Malting & feed Barley
 - Organic Milling Oats – high prices currently, rumours of contracts offered
 - Organic Feed & Milling Wheat
 - Organic Beans & Peas

Plus, on farm considerations e.g. rotation, long-term storage.

- Organic Fodder & Grazing
 - Required between organic farmers to maintain organic status of livestock
 - Shortage of organic wintering
 - Due to 2025 drought in some areas, winter feeding in short

Organic grain prices/tonne

	2025	2026	Non-Org
• Wheat (feed)	£290	£290	£164-£178
• Barley (feed)	£290	£290	£146-£161
• Barley (malting)	-	-	£170-£180
• Oats (milling)	£290	£365	£120-£152
• Beans (feed)	-	£450	£205-£220
• Peas (human consumption)		£480	

Organic livestock prices (deadweight est 2025)

- Prime organic Cattle - £7.45-£7.62/kg – price remains high, demand outweighs supply.
- Non-org cattle remained high also - £6.75-£7.09/Kg
- No organic slaughter in Scotland, all travelling south.
- Organic Cull Cows - £5.75/Kg
- Organic Lamb - £7.45/Kg (+10p/Kg for a U grade from ABP)
- Non-Org lamb remained high also YOY – £6.80-£7/Kg
- Organic Pork – £2.02-£2.30/Kg
- Non-org Pork 1.90/Kg
- Organic Milk - Persistent price premium over conv - approx 57.95p/L
- Non-org Milk Prices declined late 2025 and in free-fall in 2026 – ave 40.29p/L

ScotGov Organic Funding - AECS

- AECS Funding promised until at least 2030 (ScotGov)
- 2026 Organic Conversion & Maintenance Application Rounds:
 - Stand-alone Organic application **23 Feb - 31 July 2026**
 - Joint Organic & Agri-Environment application **23 Feb - 20th June 2026**
 - **Please don't leave until the last minute**
 - Guided advice from SOPA team & mentors
- 2025 Organic Conversion & Maintenance Results being notified to applicants now – please let SOPA Member Services know if you have been successful so we can guide you on the next steps
- ScotGov 2026 Payments Strategy timetable
 - 2026 AECS claims aimed for payments to start Feb 2027.

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ScotGov Budget update & funding

- National Budget approved by Scottish Government Jan 2026
- Rural Affairs and Land Reform given over £660 million
 - Inc £26 million for agricultural modernisation & AECs.
 - Inc a slight increase for pillar 1 basic and greening payments.
- AECs confirmed until 2030
- £400,000 investment in abattoirs for small scale kills
- £500,000 capital funding for small producers – to be tripled to £1.5 million next year
- FFIS – An extra £14.25 million to deliver a second round
- AIS

ScotGov Schemes – Rural Payments

- FFIS – Future farming investment scheme - An extra £14.25 million
- AIS – Agritourism investment scheme – max support level of 40% of up to £50,000. Apps due by 13th Mar 26
- PSF – Preparing for sustainable Farming – Claim if you undertook actions on Soil Sampling, Carbon Audits, Animal Health and Welfare Interventions in 2025. Claims due by 28 Feb 26
- SUSSS – Scottish upland sheep support scheme (1st Sep-30th Nov – currently closed)
- SSBSS – Scottish suckler beef support scheme (new conditions on calving interval threshold from 2025)
- LFASS – Less favoured area support scheme

- CAGS – Crofting agricultural grant scheme
- CCIS – Crofting cattle improvement scheme
- FVAS - Fruit and vegetables aid scheme (to encourage producer organisations).

- **SAF – remember to claim your organic AECS areas. Open 14th March - 15th May**
 - EFAs (if only part organic, it applies to areas not organic or in conversion and over 15ha) effective from Jan 26

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ScotGov Whole Farm Planning

- ScotGov requirement for all farms and crofts in receipt of the basic payment scheme payments to fill out whole farm plan for their business.
- Since May 2025 farmers and crofters need to demonstrate they have started to baseline their current practices and adopt any changes that will ensure future efficiency, sustainability and resilience.
- 2 out of a series of plans, relevant to the business, will need to be in place to receive basic payment. Indicate on SAF form, will be checked on RPID inspection.
- By 2028 all relevant plans for the business will need to be filled out.

Whole Farm Plans

- By 2026 at least half of funding for farmers will be targeted towards biodiversity gain and climate targets
- The plans include
 - A biodiversity / habitat map (encouraged from 2025, essential from 2028, to be updated every 5 years, map to be sent to SGRPID). Recommended to be updated as required to reflect any changes during that period.
 - Carbon audit (essential from 2028, to be repeated every 5 years).
 - Soil analysis – required for all region 1 land that has fertilisers and/or organic manure applied either by the claimant or their tenant must be sampled at least once every 5 years (essential from 2028. From July 2024 any new analysis must include that of Carbon). **NB: SOPA can provide this service.**
 - Animal health and welfare plan (essential by 2028, to be updated annually).
 - Integrated pest management / crop management plan (essential by 2028, to be updated annually).
 - Nutrient management plan to be completed by 2028 (to be updated annually)

Organic Equivalence to WFP

- SOPA Livestock Management Plan (LMP) and Crop Management Plan (CMP) are equivalent to the information needed by Scottish Government so no extra work for organic farmers.
- Biodiversity maps required for conversion and annual farm plans (SOPA Members).
- No SGRPID penalties in 2026, but will receive a warning.

Further Guidance

- On the government WFP website: [Whole Farm Plan full guidance](#)
- FAS advisory service – 1-1 advice & website.
- SOPA - LMPs and CMPs

Organic Food and Farming Action Plan

- Scottish Government and Scotland Food and Drink collaboratively launch the Scottish Organic Action Plan 2026 – 2029. You can download the plan on the Scotland food and drink website [here](#).
- There is also a newly developed film promoting the organic sector which features [ÒR-ganic](#), [Connage Highland Dairy](#) and [Black Isle Brewery](#), all SOPA members. You can watch the hero film [here](#).

- Sections:
 - Develop Research Training and Advisory Services
 - Raise Awareness of Organic in Scotland
 - Develop Organic Supply Chain and Markets
 - Facilitate Conversion and Maintenance of Organic land
 - Promote Public Procurement of Organic Produce

- Year 1 has received £200,000 funding

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The Organic Market – Demand and Growth



UK Overview



£3.7 billion in annual sales.



13 years of consecutive growth.



Growth across all channels – retail, home delivery, and foodservice.



~70% of consumers, including those on lower incomes, actively choose organic for health, environmental and quality reasons.⁵



Scotland



£98 million in organic grocery sales (0.8% of market).



Accounts for 7.1% of all GB organic sales.



+20.6% growth over five years (+£16.7 million).



Dairy and fresh produce dominate (20% of sales).



London Comparison



2.1% of food and drink sales are organic.



£311 million annual value.



Growth of +10.6% in past year – major commercial opportunity for Scottish brands.



European Context



Organic market share:

- Austria: 9.8%
- Germany: 4.9%
- France: 4.8%



Strong volume growth in Czechia, Romania, Italy, The Netherlands.



Organic growth abroad is often linked to sustainability and public procurement policy.

SOPA member involvement

- Video released alongside the plan – features 3 SOPA members, & case studies from Bryce Cunningham at Mossgiel, The Mitchells at Whitriggs farm, Phil Swire at Balmakewan farm.
- Action plan SG
- SOSG
 - feedback on the plan from farmers and stakeholders
 - input going forward into the next plan at the end of year 2
 - feedback on actions from the plan
 - Input into the plans review
 - Share insight into the challenges and opportunities facing organic producers

SOPA news

- New Chair of board – Jean Mclean, Mains of Culsh, Aberdeenshire
- Joanna Sinclair on maternity leave
- Becky MacAngus has left SOPA taking on an extended role at Norvite

SOPA standards & support

- New SOPA standards just released – practical and Scottish based, compliant with the UK framework. See Ready Reckoner on members website to see what's changed.
- New allowance for composts and digestate - see technical note on members area of website
- Use of Polysulphate now permitted without prior permission.
- New conversion plan template for converting farmers.
- Campaign for ongoing support for organic conversion and maintenance.
- SOPA Plans compliant with Scottish Government Whole Farm Plan requirements.
- Ongoing member support from our Member Services team.

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Updates from DEFRA

- The non-organic pullet derogation has been extended until 31st December 2026. This means the process for seeking a derogation for replacement poultry does not change in 2026.
- The 5% non-organic protein feed derogation for Monogastrics has been continued until 31st December 2026. HOWEVER this 5% will be restricted to 'young animals' being pigs under 35kgs liveweight and poultry less than 30 weeks of age. There will be a transition period to implement these dietary changes.
- The derogation for grass seed mixes has been changed to minimum **50%** organic seed by weight until 31st December 2026. Note this **only applies to grass seed mixes**, whereas arable silage and other forage mixes remain at minimum 70% organic seed by weight.

SOPA Events 2026

- Series of SOPA webinars for members - conversion training, next steps, WFP, EFAs, AECs all included – starting March.
- Upcoming Farm visits
- AGM June
- SOPA Stand Royal Highland Show, 18-21 June

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Member services contact details

- **Tel: 0300 772 9795**
- **Email: info@sopa.org.uk**
- **Website: www.sopa.org.uk**
- **Facebook: ScottishOrganic**
- **Instagram: scottish_organic**
- **Whatsapp: ScotOrg Cereals and Crops group**

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