



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

Scottish Organic Producers Association – Leading Scottish Organics



Organic Agriculture Worldwide 2023

Organic Farmland



98.9 M ha
Organic farmland in million (M) hectares (ha)
2.6 % Growth 2022/2023
188 Countries with organic farming

Farmland in million (M) hectares
Top 3 countries



Organic Operators

4.3 M
Organic farmers (million)

0.13 M
Organic processors

Number of producers
Top 3 countries

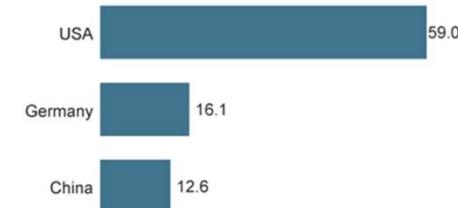


Organic Market

The global market is growing and consumer demand is increasing

136.4
Global organic food market in billion euros

Market in billion euros
Top 3 countries



Market growth in percent
Top 3 countries 2022/2023



Organic Agriculture Worldwide 2024

Organic Farmland



98.9M ha

-0.2% Growth 2023/2024

183 Countries with organic farming

Farmland in million (M) hectares
Top 3 countries

Australia 53.0M

India 4.0M

Argentina 3.9M

Organic Producers

4.8M
Organic farmers (million)

0.14M
Organic processors

Number of producers
Top 3 countries

India 2'363'607

Uganda 454'246

Ethiopia 203'258

Organic Market

The global market is growing and consumer demand is increasing

144.9
Global organic food market in billion euros

Market in billion euros
Top 3 countries

USA 50.4

Germany 17.0

China 15.5

Market growth in percent
Top 3 countries 2023/2024

Norway 21.3

Luxembourg 20.2

Hungary 13.9

Imports/Exports

Organic imports into the European Union (EU) and the United States* (US)

5.9M
Total organic imports to the EU and US* in million metric tons (MT)

Imports to the EU and US* in million MT. Top 3 countries

Mexico 0.855M

Ecuador 0.786M

Canada 0.376M

Imports to the EU and US in metric tons. Top 3 commodities

Bananas 1'335'612

Oil-cakes and -sheds 593'753

Sugar 526'696

*US organic imports selected commodities only

FiBL

Source: FiBL survey © 2026

More information: www.organic-world.net - statistics.fibl.org

Infographic I: Organic agriculture worldwide - key indicators 2024

Source: FiBL survey 2026

Organic Agriculture in Europe 2023

Organic Farmland



19.5 M ha Organic farmland in million (M) hectares (ha)
4.1 % Growth 2022/2023
3.9 % Organic share of total farmland

Farmland in million (M) hectares
Top 3 countries



Organic Producers

The number of organic producers is increasing

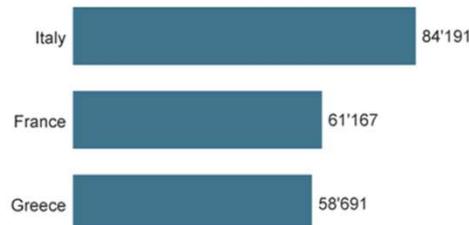
494'624

Organic
producers

1.4 %

Growth
2022/2023

Number of producers
Top 3 countries



Organic Market

The European market increased slightly in 2022/2023

54.7

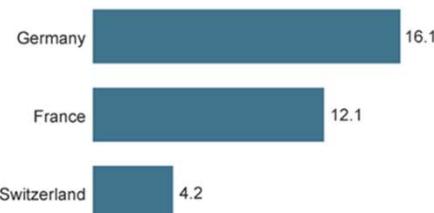
Europe's organic retail sales in billion euros

66

Per capita spending in euros

3.0 % Organic market growth 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



19.6M ha
Organic farmland in million (M) hectares (ha)
-0.5% Development 2023/2024
3.9% Organic share of total farmland

Farmland in million (M) hectares
Top 3 countries



Organic Producers

The number of organic producers remains stable

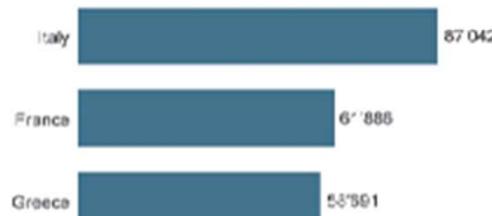
490'637

Organic
producers

93'978

Organic
processors

Number of producers
Top 3 countries



Organic Market

The European market increased slightly in 2023/2024

58.7

Europe's organic retail sales in billion euros

66

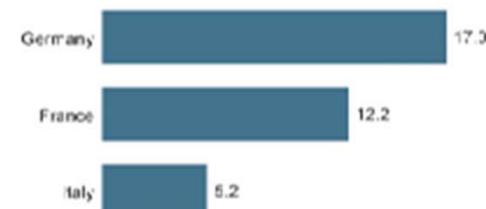
Per capita spending in euros

4.1%

Organic market growth 2023/2024

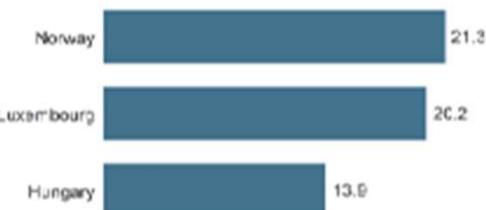
Market in billion euros

Top 3 countries



Market growth in percent

Top 3 countries 2023/2024





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.



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.

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

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

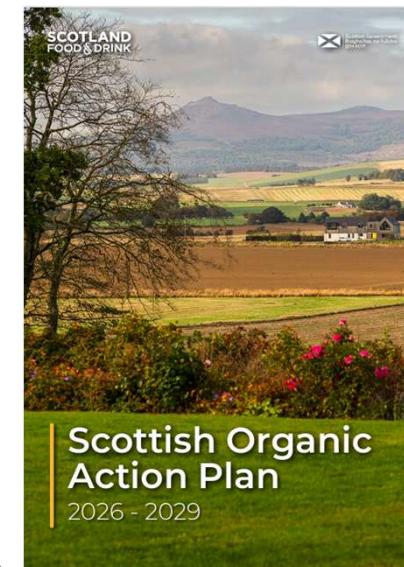
- SOPA Livestock Management Plan (LMP) and Crop Management Plan (CMP) are equivalent to the information needed by Scottish Government so no extra work for organic farmers.
- Biodiversity maps required for conversion and annual farm plans (SOPA Members).
- No SGRPID penalties in 2026, but will receive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

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
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- **Instagram:** scottish_organic
- **Whatsapp:** ScotOrg Cereals and Crops group

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