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DYNAMICS OF ORGANIC AGRICULTURE IN THE UK

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Abstract

With the beginning of the 1990's, organic agriculture in the UK has expanded rapidly, in the middle of the year 2003 it represented 4% of the agricultural surface with around 4000 farms, managing almost 720.000 hectares. This growth was brought by the consumers and decisional factors which see organic agriculture as a contribution to environment, social and nutritional welfare purposes. This is one of the sustainable food production strategies; another being the integrated agriculture, a less restrictive option for the farmers. The most recent national statistics presented by DEFRA (The Department for Environment, Food and Rural Affairs) on organic farming were published in July of 2012. These present information gathered throughout 2011 for organic crops and livestock in the UK and the number of organic producers/processors registered with the Organic Certification Bodies in Great Britain.

Key words: *Great Britain, organic agriculture, sustainable strategies, organic producers/processors*

INTRODUCTION

Global sales of organic products continue to defy the economic downturn, growing in 2010 and with growth continuing into 2011.
One exception is, however, the UK where, despite areas of strong growth and improvement in the long term trend, overall sales were down by 3.7 percent in 2011, according to the latest organic market analysis by the Soil Association.
In the UK, the main cause of the market's overall decline was a 5 percent drop in multiple retail sales, which account for 71.4 percent of organic food sales.
Reduction of choice, lack of communication about the reasons to buy organic products and a lack of investment in own-label organic ranges are the key factors of this decline.

MATERIALS AND METHODS

The article was mainly based on research extracted from the findings on the organic farming sector which were released on 5 of July 2012 by the Department for Environment, Food and Rural Affairs in the United Kingdom.
This governmental release shows information gathered during the year 2011 for organic crops and livestock produced in the United Kingdom, and the numbers of organic producers/processors who are registered with organic certification bodies in the UK.

RESULTS AND DISCUSSIONS

The key results of the research are as follows:
The total area of organic land in the UK has shown a decrease of 9% between 2010 and 2011 from 739 thousand ha in 2009 to 656 thousand hectares. The main surfaces in conversion and organic farming ae situated in England, South West, Scotland, Wales and South-East including London (Tables 1,2 and3).
In-conversion land declined from 199 thousand ha in 2009 to 37 thousand ha in 2011. The largest surfaces in-conversion there are in England, South West and Scotland (Table 1).
Organic land remained stable at 619 thousand ha, of which the largest surfaces are in England, South West, Scotland and Wales (Table 2).

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Table 1. In-conversion land

In-conversion	**2009***	**2010***	**2011***
North East	7	4	3
North West	3	2	1
Yorkshire & Humberside	3	1	1
East Midlands	3	1	0
West Midlands	6	2	2
Eastern	4	1	1
South East (inc. London)	7	4	4
South West	35	14	14
England	68	30	25
Wales	37	4	2
Scotland	12	13	5
Northern Ireland	3	4	4
United Kingdom	**119**	**51**	**37**

*Notes: *Thousand hectares, Source:* Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

Table 2. Organic land

In-conversion	**2009***	**2010***	**2011***
North East	27	31	28
North West	20	20	16
Yorkshire & Humberside	12	14	13
East Midlands	14	16	15
West Midlands	32	35	29
Eastern	14	17	16
South East (inc. London)	52	54	51
South West	140	175	157
England	311	362	326
Wales	89	119	120
Scotland	209	176	165
Northern Ireland	10	10	8
United Kingdom	**619**	**668**	**619**

*Notes: *Thousand hectares, Source:* Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

The cereals area has seen a similar decrease of 8% to 52 thousand hectares, while the vegetables area (including potatoes) has shown a slightly larger decrease of 13% over the year to 16 thousand hectares.

Temporary and permanent pasture land in conversion decreased from 19,628 thousand ha in 2009 to 5,816 thousand ha in 2011. But the majority of organic land registered a deep change between 2010 and 2011.

Table 3. Total (Organic and in-conversion land)

In-conversion	**2009***	**2010***	**2011***
North East	33	35	31
North West	23	22	18
Yorkshire & Humberside	15	15	13
East Midlands	18	17	16
West Midlands	38	38	31
Eastern	18	19	17
South East (inc. London)	59	58	55
South West	175	188	171
England	379	392	351
Wales	125	123	123
Scotland	221	189	170
Northern Ireland	13	15	12
United Kingdom	**739**	**718**	**656**

*Notes: *Thousand hectares, Source:* Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

Figure 1 shows organic crop areas over time from 2004 to 2011. The graph shows that for all crop types shown, areas have been in decline since 2009, with cereals showing the greatest rate of decrease.

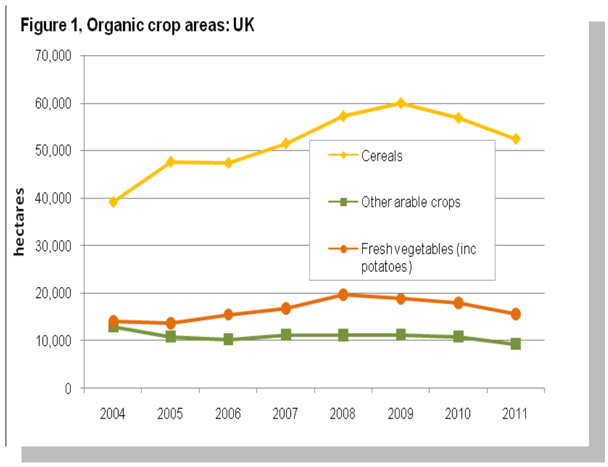

Figure 1. Organic crop areas in the UK

In-conversion land is mainly situated in the farms producing cereals, even thou the surface in conversion declined from 6,538 thousand ha in 2009 to 1,175 thousand ha in 2011 (Table 4).

Temporary pasture showed a decrease of 7% to 116 thousand hectares.

Permanent pasture decreased by 9% to 435 thousand hectares.

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Table 4. In-conversion land use in UK

In-conversion	2009*	2010*	2011*
Cereals	6 538	2 165	1 175
Other crops	2 065	690	432
Fruit & nuts	312	231	175
Vegetables (including potatoes)	1 613	516	270
Herbaceous & ornamentals	831	954	461
Temporary pasture	19 618	7 288	5 816
Permanent pasture [(a)]	82 719	35 712	24 402
Woodland	2 557	1 894	1 691
Unutilised land	3 186	1 344	2 493
Total (Hectares)	**119 441**	**50 794**	**36 914**

Notes: (a) Includes rough grazing. Source: Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

Table 5. Organic land use in UK

In-conversion	2009*	2010*	2011*
Cereals	53 433	54 685	51 303
Other crops	9 120	10 159	8 889
Fruit & nuts	1 891	2 036	1 977
Vegetables (including potatoes)	17 270	17 436	15 395
Herbaceous & ornamentals	4 924	5 220	5 653
Temporary pasture	106 598	117 457	110 306
Permanent pasture [(a)]	413 040	443 307	410 543
Woodland	4 616	6 224	6 633
Unutilised land	8 376	11 027	8 375
Total (Hectares)	**619 268**	**667 551**	**619 073**

Notes: (a) Includes rough grazing. Source: Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

In 2011, total organic area in UK accounted for 655,988 thousand ha, being by about 12 % smaller than in 2009, when it was 738,709 thousand ha (Table 6).

Holdings structure pointed out that the largest number of holdings are dealing with organic farming covering about 53,634 ha.

In conversion there are 69 holdings preparing for organic agriculture.

And about 424 are in conversion or certified farms as practicing organic agriculture.

Most of organic holdings are dealing with cereal, potato and vegetable growing. Their structure is the following one: 197 cereal holdings, 42 potatoes holdings and 51 holdings dealing with vegetable growing (Table 7).

Table 6. Total organic area (In-conversion & Organic)

In-conversion	2009*	2010*	2011*
Cereals	59 971	56 850	52 478
Other crops	11 185	10 850	9 321
Fruit & nuts	2 203	2 267	2 152
Vegetables (including potatoes)	18 884	17 952	15 665
Herbaceous & ornamentals	5 755	6 174	6 114
Temporary pasture	126 216	124 745	116 121
Permanent pasture [(a)]	495 759	479 019	434 945
Woodland	7 174	8 118	8 324
Unutilised land	11 563	12 371	10 868
Total (Hectares)	**738 709**	**718 345**	**655 988**

Notes: (a) Includes rough grazing. Source: Department for Environment, Food and Rural Affairs (DEFRA), 5 July 2012

There was mixed news for the UK organic livestock sector with sheep and pig numbers both showing increases on 2010, while cattle and poultry numbers both showed decreases. The sheep sector showed an increase of 18% to 1,162 thousand head, mainly due to large numbers of Welsh operators becoming fully organic. Organic pig numbers rose by 11% to 53 thousand head. Organic poultry numbers showed a large decrease of 27% to 3 million in 2011 as high feed and energy prices continue to increase the pressure on producers. Cattle numbers for the UK have fallen by 4% to 335 thousand head.

Cattle and poultry numbers have both decreased over the previous year with poultry numbers showing a sharp decline due to high feed and energy prices and uncertainty of changing feed regulations. Pig numbers have levelled out over the last couple of years.

The number of organic producer/processors has fallen again (by 5%) to around 6'900 at the end of 2011. All UK regions have shown decreases with Scotland and Yorkshire and the Humber both showing the largest percentage drop of 8%.

Table 7. Farm Structure Survey Organic Land Data

	Specification	Figures
Organically farmed area	Holdings	393
	Ha	53,634.22
Area under conversion to Organic farming	Holdings	69
	Ha	4,011.01
Area under conversion or certified Organic	Holdings	424
	Ha	57,645.23
Organic farming - Cereals	Holdings	7,993.24
	Ha	197
Organic farming - Potatoes	Holdings	42
	Ha	676.67
Organic farming - Fresh veg & Strawbs	Holdings	543.44
	Ha	51
Pasture and Meadow (exc. Rough Grazings)	Holdings	416
	Ha	47,497.32
Organic farming - Fruit & Berry	Holdings	*
	Ha	*
Organic farming - Other Crops	Holdings	70
	Ha	934.41

Source:
Scottish Government, RESAS Statistics (Agriculture)
*Note: * denotes that numbers have been withheld to prevent disclosure of information relating to individual holdings*

Table 8.Farm Structure Survey Organic Livestock Data

	Specification	Figures
Organic farming Bovine animals	Holdings	211
	Heads	37,849
Organic farming-Pigs	Holdings	17
	Heads	4,527
Organic farming-Sheep and Goats	Holdings	180
	Heads	177,857
Organic farming - Poultry	Holdings	39
	Heads	171,585
Organic farming – Other animals	Holdings	0
	Heads	0

Source:
Scottish Government, RESAS Statistics (Agriculture)
*Number of head
(a) unable to provide full historical data for sheep as there are some inconsistencies in the historical data
(b) "Other Livestock" includes goats, farmed deer, horses, camelids and any livestock not recorded elsewhere.
Source: Department for Environment, Food and Rural Affairs (DEFRA), Last updated 5 July 2

Figure 2 shows numbers of organic cattle, pigs and poultry over time from 2004 to 2011 (please note the dual axis due to the comparatively high numbers for poultry).

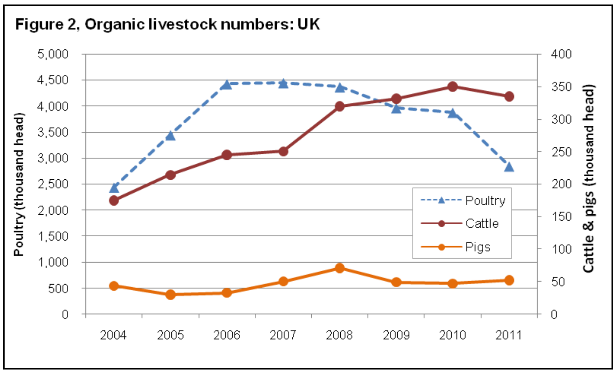

Figure 2. Organic Livestock numbers in the UK

Figure 3 shows the regional distribution of organic producers / processors in the UK. This clearly shows that South West region has the largest share of organic operators in the UK while the North East region contains the smallest number of organic operators. Regional distribution across the UK has shown very little change from 2010.

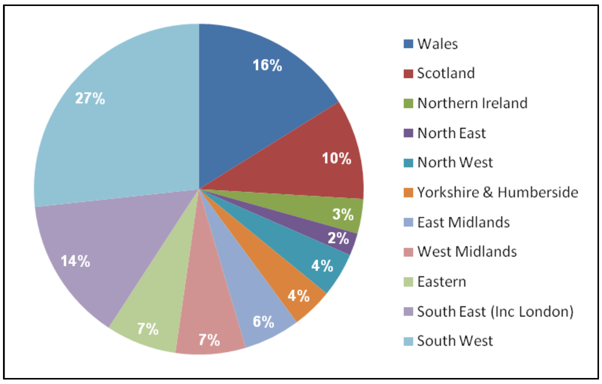

Figure 3. Number of organic producers/operators by UK regions in 2011

The market for organic products is generally buoyant and expanding. Retail sales of organic produce are now worth approx. £1.2 billion per year with considerable opportunity for import substitution through increasing home production. All the available evidence suggests that for the foreseeable future the UK organic market will continue to increase and many farmers and growers may be missing a good business opportunity if they do not give serious thought to organic production.

CONCLUSIONS

Global sales of organic products in the United Kingdom continue to defy the economic downturn, growing in 2010 and with growth continuing into 2011.

The total area of organic land in the UK has shown a decrease of 9% between 2010 and 2011.

The cereals area has seen a similar decrease of 8%, while the vegetables area has shown a slightly larger decrease of 13% over the year.

Temporary and permanent pasture land make up the majority of organic land and therefore drive the change between 2010 and 2011, with temporary pasture showing a decrease of 7% permanent pasture decreasing by 9%.

The South West region has the largest share of organic operators in the UK while the North East region contains the smallest number of organic operators.

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