# Organic vegetables update

**Summary**

Initial results from an HDRA/Soil Association project, funded by DEFRA into the organic vegetable market in the 2001/02 season are highlighting the recent rapid increase in UK grown organic vegetable production. During the past two years the area of organic horticultural land has nearly doubled from 2990 to 5437 hectares. For a range of twenty five vegetables which can be grown commercially in the UK, levels of self sufficiency are estimated to have risen from 20-30% to an average of 57% for all vegetables. The 2001/02 marketing season was a difficult one, as there was oversupply for part of the season for a number of crops; notably potatoes, cabbage and lettuce. Many new growers and packers have risen to the challenge of supplying the organic market by converting land and facilities for organic production. Unfortunately the resulting increase in UK supply coincided with a slowing down in the rate of growth of the organic market and a continued flow of imports . In the future UK growers face a more challenging market environment, with predicted lower growth rates and intense competition from in some cases high quality and cheaper imports from a well organised and supplied European market. Early reports from the 2002 season are indicating that the market is more stable.

**Detailed Results**

As part of the study crop area data has been collected from all the certification bodies and the data for 2001/02 is shown in Table 1 below. At the same time data on volumes, values, source of produce and the time of year when it is UK sourced, has been obtained from thirty packers and wholesalers. Data has been obtained for twenty five produce categories and this information is presented in table 2.

The 2001/02 marketing season has been described as ‘difficult’, ‘challenging’ and ‘disastrous’ by the various packers, wholesalers and growers contacted as part of this study. This is probably the first time oversupply of organic vegetables has been reported, and this resulted in some produce being ploughed in (lettuce, and cabbage), others not being marketed (potatoes), or sold on conventional markets at lower prices (other brassicas). The main cause was the rapid increase in supply of organic vegetables. The area of organic vegetables increased by 44% from 1999 to 2000 and by 26% from 2000 to 2001. This was combined with an increasing supply of imports and with a slowing down in the rate of increase in demand for organic vegetables, from 44% in 2000 to 18% in the 2001 (Source: TNS).

**Table 1: UK land area of organic horticultural crops 1997-2001 (hectares)**

| | Potatoes | Root crops | Green veg | Salads & prot. cropping | Flowers and ornamentals | Total | % increase |
|---|---|---|---|---|---|---|---|
| 1997 | 744 | 456 | 1008 | 192 | - | 2400 | |
| 1998 | 911 | 495 | 991 | 208 | - | 2605 | 9 |
| 1999 | 1150 | 650 | 900 | 230 | 60 | 2990 | 15 |
| 2000 | 2081 | 1000 | 830 | 294 | 112 | 4317 | 44 |
| 2001 | 2750 | 1200 | 900 | 188 | 128 | 5437 | 26 |

*Source; Soil Association*

**Produce categories**

The UK market situation has changed rapidly in the past few years for a number of crops. For the twenty five produce categories, the level of self sufficiency of UK grown organic produce averaged 57% by volume (range 7-96%), with the remainder being imported. As previously mentioned, for some crops and at certain times of the year, the market for a number of crops in 2001/02was oversupplied. This was typically from September to December for crops like potatoes, mid summer for lettuce and late summer for some brassicas.  The challenge still remains to increase UK supply at the beginning and end of the season for most crops. However, this is the time when it is more risky for farmers to grow the crops, in that there are likely to be more pest and disease problems, and also they often clash with imports. From projections supplied by packers and wholesalers it is estimated that for many crops there is potential to increase UK supplies by 10-15% (excluding annual growth rates).

Some of the other reasons for oversupply in the 2001/02 season can be explained by over-programming by supermarkets and pre-packers, the continued use of imports, and also farmers growing without a planned market. There is clearly a need for better communication and cooperation in the organic food chain. In some cases UK produce still has to improve its continuity of supply, quality and to compete on price in comparison with imported produce. The overall European market is well supplied with organic vegetables, ‘the EU is awash with organic carrots’ said one packer. EU producers have been increasing their supply specifically for the UK market. There are also many examples in other EU countries of good cooperation between growers which has facilitated improved marketing.

For the current season (2002/03) most packers and wholesalers are still predicting an increase in their sales of between 0-15%. However, it does seem more likely to be a case for a period of consolidation in the market.

Chris Firth
Monday, 25 November 2002

**Table 2: UK Organic Vegetable Market: Initial results from DEFRA funded study -Key statistics for 25 crops**

| | Total organic market[1] (t) | UK (t) | UK (%) by volume | UK (ha) | Typical monthly breakdown of use of UK and imported produce | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Early Potatoes[2] | 12317 | 6814 | 55 | 852 | | | | | | | | | | | | |
| Main Potatoes | 27218 | 17638 | 65 | 1038 | | | | | | | | | | | | |
| Carrots[3] | 13383 | 8724 | 65 | 349 | | | | | | | | | | | | |
| Onions | 7339 | 2447 | 33 | 175 | | | | | | | | | | | | |
| Leeks | 1149 | 976 | 85 | 122 | | | | | | | | | | | | |
| Swedes | 1333 | 1276 | 96 | 75 | | | | | | | | | | | | |
| Beetroot | 2248 | 1387 | 62 | 99 | | | | | | | | | | | | |
| Parsnips | 1283 | 731 | 57 | 66 | | | | | | | | | | | | |
| Other roots | 1173 | 453 | 39 | 45 | | | | | | | | | | | | |
| Cauliflower | 2905 | 1864 | 64 | 155 | | | | | | | | | | | | |
| Cabbage | 5579 | 3825 | 69 | 255 | | | | | | | | | | | | |
| Broccoli | 2613 | 1230 | 47 | 351 | | | | | | | | | | | | |
| Other green veg | 1282 | 682 | 53 | 195 | | | | | | | | | | | | |
| Peas | 614 | 322 | 52 | 107 | | | | | | | | | | | | |
| Beans | 465 | 144 | 31 | 48 | | | | | | | | | | | | |
| Lettuce | 3046 | 1846 | 61 | 154 | | | | | | | | | | | | |
| Celery | 1097 | 461 | 42 | 92 | | | | | | | | | | | | |
| Other Salads | 292 | 166 | 57 | 33 | | | | | | | | | | | | |
| Courgettes | 1337 | 465 | 35 | 93 | | | | | | | | | | | | |
| Sweetcorn | 374 | 192 | 51 | 38 | | | | | | | | | | | | |

| | Total organic market[1] (t) | UK (t) | UK (%) by volume | UK (ha) | Typical monthly breakdown of use of UK and imported produce | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | | | |
| Aubergine | 135 | 10 | 7 | 1 | | | | | | | | | | | | |
| Cucumbers | 8031 | 3465 | 43 | 9 | | | | | | | | | | | | |
| Tomatoes | 8180 | 4447 | 54 | 20 | | | | | | | | | | | | |
| Peppers | 471 | 47 | 10 | 3 | | | | | | | | | | | | |
| Herbs | 302 | 120 | 40 | 60 | | | | | | | | | | | | |

Key Mainly UK sourced Mainly imported

[1] UK produce plus imports
[2] The monthly breakdown relates to main crop potatoes.
[3] Monthly breakdown relates to main crops carrots