A New Era for UK Organic Cereals

2022 HANDBOOK

FOR ARABLE FARMERS & ADVISORS

Soil Association

Photo: Elliott Neep

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Cover: Dartington Farm

Strong Prospects for Organic Arable

Increasing numbers of farmers are considering transitioning to more regenerative practices, including organic farming. For the arable sector the continued growth in demand for organic food (4-7% annual growth since 2014) is underpinning rising demand for organic crops grown either for human consumption or livestock feed. This is coinciding with an increased imperative to source more locally, especially for the organic protein portion of diets. This report sets out the current opportunities and challenges facing organic arable farming and makes the financial case to farmers and their advisors who are considering organic production.

Demand for organic food is growing in the UK much faster than domestic supply of organic crops. The UK is facing an increasing deficit of arable crops for animal feedstuffs at a time when other countries, especially the USA, are increasing demand at an unprecedented rate. In 2019, the UK imported close to 80% of its organic animal feedstuffs. Year-on-year reliance on imported feeds is increasing. Current estimates suggest that at least 160,000 tonnes of organic animal feedstuffs are now being imported annually and some livestock are now routinely wholly reliant on imported feed[1]. To underpin the UK organic sector, the area of organic arable crops produced in the UK could easily double to 86,000 ha. At the same time, processors and retailers are increasingly searching for UK sourced ingredients for organic food—including organic livestock feeds—to be certain of product integrity, to reduce risk of disruption to supply.

A common misconception of organic production is that lower yields must equal lower profits, but Farm Business Survey annual benchmarking figures show this is generally not the case. Lower input costs and increased support mean that often organic farms are just as, if not more, profitable than their non-organic counterparts. Right now, the fact that organic farms are less impacted by input price volatility is a significant benefit. This is because input use is restricted. The organic market is certainly smaller but innovative partnerships between farmers and their customers are shortening supply chains and increasing price stability.

Liz Bowles,
Head of Farming,
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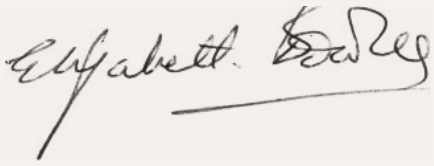


Organic farms are less impacted by input price volatility

Demand for Organic

How the UK organic market is affecting UK farmers

Against the backdrop of the pandemic, the global market for organic food showed its highest growth ever in 2020, exceeding 120 billion euros[2]. In the UK, the organic market has seen 10 years of positive growth, showing remarkable resilience despite the supply chain disruption caused by the pandemic and Brexit. The UK organic market continued to grow by 5.2% in 2021, with shoppers spending almost £60 million on organic products every week, and is now worth over £3 billion[3].

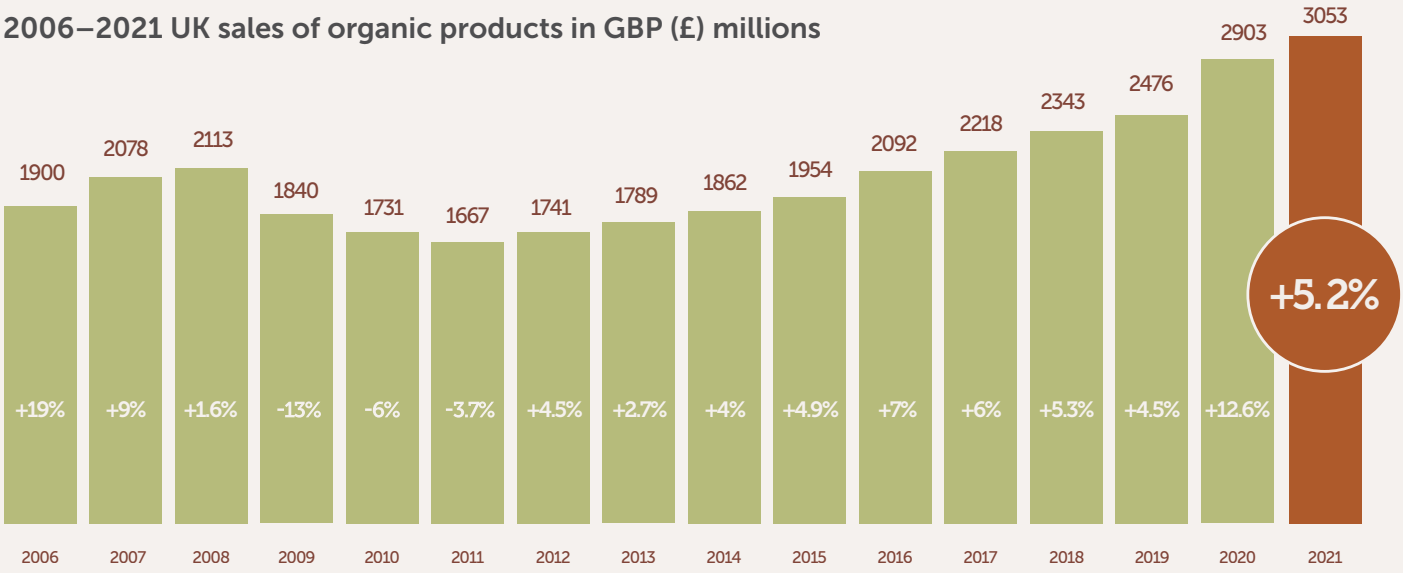
Sales of organic are at their highest ever level

Sales of organic are at their highest ever level and are significantly outperforming non-organic, as the trend for sustainable and healthy options has clearly 'stuck' with more consumers seeking climate and nature friendly options. 70% of consumers are more concerned about health, sustainability and the environment following the pandemic and COP26, and many want to buy British[4].

Although inflationary and supply chain pressures will continue be a challenge for all farmers, the organic market is a resilient one which offers opportunities for organic farming and meets the growing consumer need for healthy and sustainable food.

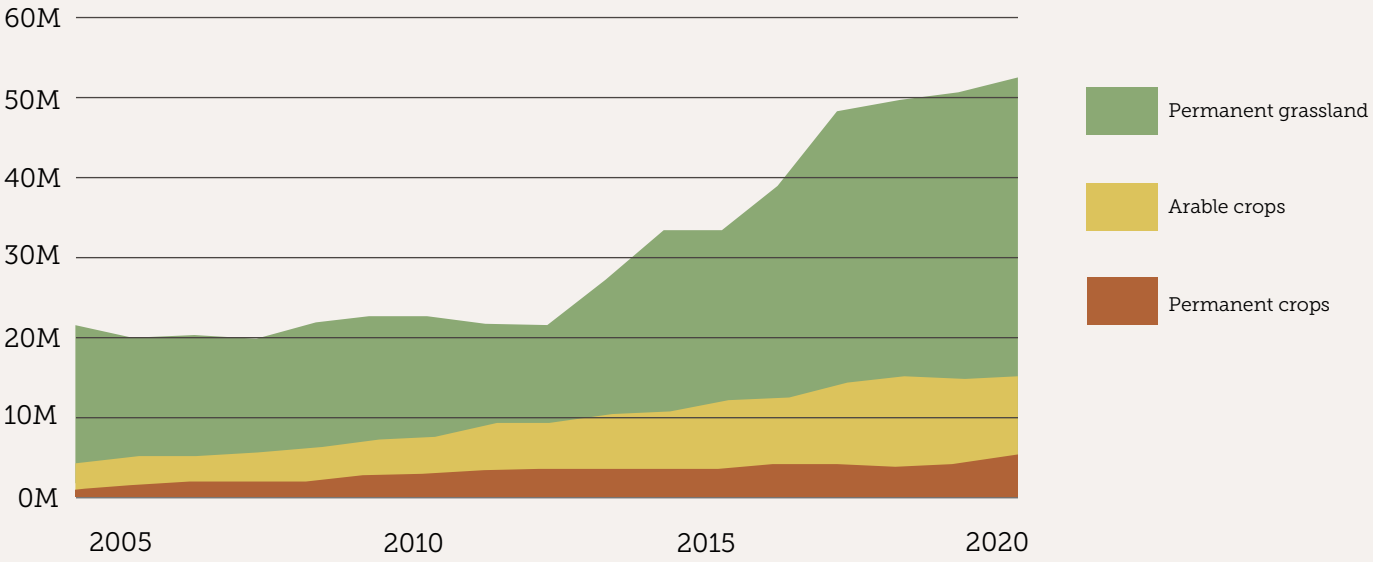
The opportunity for UK farmers and supply chains now is to step up to meet the demand presented by the strong growth in the organic market. At present, approximately 2.9% of UK land is organic[5] but more ingredients and products are being imported to support increased demand. With more robust supply chains, UK farmers can be supported to meet growing organic demand and increase supply chain resilience.

2006–2021 UK sales of organic products in GBP (£) millions



Organic Market Report, February 2022

Trends in area of organic land worldwide 2020 (million hectares) by land use



Source: FiBL- IFOAM–The World of Organic Agriculture 2022

Although the global area of organic arable land has increased by 9.5 million ha between 2005 and 2020 (an increase of over 200%) this is much smaller than for permanent grassland (up 29 million ha in the same period)[6]. In the UK, the area of organic land was in decline for many years following the financial crash in 2008, but has been increasing again since 2018. By 2021, the total area under organic management in the UK was 506,000 ha with 46,600 ha in arable crops (accounting for just 9.2%) where permanent grassland makes up 61%[7].

Clearly most organic certified farmland is not used for arable cropping. However, continued strong UK demand for organic dairy and poultry—sectors with the highest demand for animal feedstuffs—has created a structural imbalance within the UK which is driving increased dependence on imports of organic animal feedstuffs. Alongside this, global demand is rising, leading to increased prices. This presents a significant opportunity for arable farmers to convert to organic production to supply this growing market.

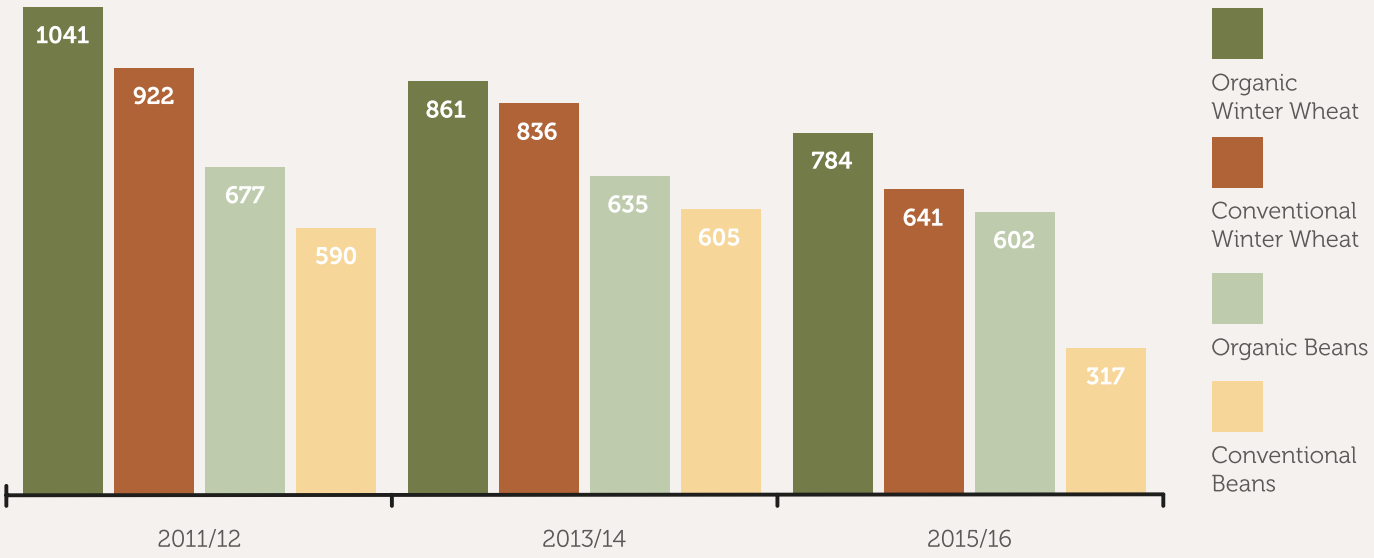
A quarter of all organic sales made in the UK are within the dairy category, which includes eggs, one of the fastest growing organic categories[8].

Does Organic Arable Stack Up?

Comparing financial performance of organic and non-organic arable farming

The easiest way to compare organic and non-organic performance is to look at gross margins based on a single year's crop costs and yields. The assumption is usually made that non-organic will easily out-perform organic because there are more inputs available to maximise yield, and therefore profitability. But figures from the Rural Business Network do not support this assumption.

Gross margin analysis of organic and non-organic crops (£/hectare)



Source Rural Business Survey 2015/16 Organic Farming in England

(Editor's note: At the time of going to press (June 2022), updated information was not available. It is expected imminently and will be available online at www.soilassociation.org/arable-report)

This simple analysis is misleading because on organic farms it is the importance of rotations, fertility breaks and interactions between enterprises that generates profitability, not one individual crop.

Organic farms are often mixed or have a high value niche crop as part of their rotation, with that crop or the livestock enterprise adding to whole farm profitability. In a stockless system, a fertility building crop is a cost; but on a mixed farm it is a feed source, with livestock contributing to overall farm gross margin.

Another difference between organic and non-organic farms is the replacement of crop management tools such as chemicals and fertiliser with mechanical weeders, replacing variable with fixed costs. Fixed costs can also be reduced under organic with less machinery and crop storage needed. In addition, more spring cropping and longer rotations reduce the size and cost of the machinery needed on organic farms, as well as significantly reducing total working capital requirements.

Defining 'Organic, 'Agroecological' and 'Regenerative'

In a world that needs all thoughts, actions and practices to be labelled or put in boxes, the terms 'organic', 'regenerative' and 'agroecological' stand out as farming systems that may seem to compete. In reality, they are mutually inclusive but offer differences.

Organic is a legally defined system with inspection and verification as its backbone. If you do not comply with its standards, you are not an organic farmer. Organic is a 'whole system' approach to farming and food production. It recognises the close interrelationships between all parts of the production system, from the soil to the consumer.

Although some define it by the prohibition of inputs (artificial fertilisers and agrochemicals), organic farming is more complex because it is a whole farm system, using methods which reduce the need for these inputs. Being recognised in law means products come with a premium, based on an assurance that they are largely chemical free and that animal welfare standards are higher.

It is here that there comes an overlap with agroecology, a system defined by the FAO (the Food and Agriculture Organisation of the UN) based on 10 elements (diversity; synergies; efficiency; resilience; recycling; co-creation; social values; culture; responsible governance; circular and solidarity economy). It describes a whole farm approach, recycling nutrients, working with nature and using holistic and long-term solutions rather than quick fixes. Agroecological farmers can use artificial inputs, but systems and rotations are still based around a circular system which keeps soil health as its starting point.

Regenerative farming is a term becoming commonly used and is based around five key principles (minimising cultivations, keeping ground covered, keeping living roots in the ground, diversity of plants and integrating livestock). In addition, there is an ambition to reduce the use of fertilisers and sprays. Without any form of verification, any farmer adopting any of these practices can call themselves regenerative, but does not need to do them all. It has become synonymous with arable farmers and no-till systems but could equally apply to livestock systems.

Many regenerative farmers are finding that the practices they employ are getting closer to those used by organic farmers. As soil health increases through cover crops, the need for fertiliser and agrochemicals reduces and farm biodiversity returns.

As with agroecology, there is no verification, no inspection and no premium for the products from regenerative farms. Unless destined for local markets, they are sold into the same marketplace as products from the conventional farming systems, where there is no way to differentiate between different farming approaches.

As a benchmarking tool, Net Farm Income (NFI), is a measure which allows individual farms of different tenure, business organisation and indebtedness to be compared directly with one another on a consistent basis. Using this methodology, which includes imputed rent but excludes ownership costs and interest payments, the table below compares organic and non-organic farm types in the year ending March 2016.

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Comparative income figures (£/hectare) for organic and non-organic farm types

NFI/HA (£) 2015/16	ORGANIC MEAN	NON-ORGANIC MEAN	DIFFERENCE
Cropping	211	96	115
Horticulture	1052	1171	-119
Dairy	366	168	198
LFA grazing	130	80	50
Lowland grazing	122	0	122
Mixed	187	122	65

Source: Rural Business Survey 2015/16 Organic Farming in England

These benchmarking figures show that organic farms generate 90% of the total output per hectare of a non-organic farm. Agricultural output accounts for 79% of this, the difference being due to environmental payments which are higher on average for organic farms. Overall costs are 16% less due to no fertiliser and crop protection costs, although overheads are slightly higher. Overall the Net Farm Income of £211/ha is significantly higher than the non-organic figure of £96/ha.

Selling Organic

Opportunities and developments in the organic supply chain

The market within the UK for organic arable production is coming of age. From very small beginnings when organic grains were first traded, the market for organic crops within the UK has grown consistently, with over 200,000 tonnes now required each year, most of which is imported. This provides increased opportunity for growth for the UK arable land area for import substitution, which coincides with both consumer and supply chain demand for relocalisation.

The organic market is characterised by a high level of entrepreneurship, essential for developing markets. However, as the market matures, more sophisticated trading mechanisms are starting to be developed which provide greater security for growers.

Organic farmers often grow a wider range of crops than many of their non-organic counterparts, including rye, spelt, triticale, quinoa, peas and beans and starting to look at the potential for soya.

As consumer attitudes change[4], there is potential for increased organic pulse production in the UK, for human consumption as well as for livestock feed.

Provenance is a key driver for the organic market. This becomes more important as the market grows, because pulling in product from all over the world can exacerbate consumer concerns over integrity. This coincides with current geopolitical instability and the demonstrable impact of climate change. To combat this, supply chains are increasingly starting to demand that organic farmers include UK-produced feedstuffs in livestock diets.

Retailer taking the lead

An example of this is a multiple retailer with a major stake in the organic sector in the UK. They are working to support organic arable farmers with stabilised pricing contracts for all crops produced in a typical organic rotation (peas/beans; wheat and barley/oats). They are doing this to reduce the risk in supply chains from:

- currency fluctuations associated with importing organic feedstuffs
- feed supply integrity concerns associated with feedstuffs from some countries
- uncertainty over future trading arrangements
- meeting consumer expectations of UK organic foods

The bottom line: price data for organic cereals

Organic farmers are benefitting from sustained prices above those for non-organic cereals with premiums over conventional prices. Pricing is often localised and based on spot sales rather than contract or futures.

In 2022 volatility in prices are driven by hydrocarbon inflation and supply chain disruptions. The former has less impact on organic farms than the latter. There is a clear separation in this regard with the conventional sector, making meaningful price comparisons difficult.

Prices for organic cereals in 2022

CROP	£/TONNE
Wheat, feed	£465
Wheat, milling	£520
Barley, feed	£430
Barley, malting	POA
Oats, milling	£360
Oats, feed	£360
Beans	£565

Source: Saxon Agriculture, May 2022
(for monthly updates, see www.soilassociation.org/price-data)

In 2022 volatility in prices are driven by hydrocarbon inflation and supply chain disruptions

ORGANIC PERSPECTIVE

Paul Dovey,
Farm Manager,
Goodwood
Home Farm
3,800 acres,
West Sussex

"Conversion to organic started in the 1990s. The farm had always been mixed with dairy and arable cropping. Now some 25 years later we're even more diverse, with an arable enterprise, dairy, beef, pig and sheep. We also process malting barley and milk.

For me, successful organic arable farming is about timing and planning. There are no 'get out of jail free cards'! From preparing for the rotation, thinking about the soil, selecting the right varieties, through to using the most effective crop establishment kit to ensure seeds are in the right place—all elements are essential. It's much easier to think it through first than find remedies later.

One of our innovations is to use the dirty water from the dairy herd to provide extra nutrients and moisture for the arable crops. We estimate this has improved arable yields by up to 0.5 tonnes per ha.

The arable rotation includes wheat, followed by malting barley, then whole crop for the cattle on the farm into a grass/clover fertility building phase. Much of the malting barley produced is used to make our own organic beer.

I'm a great believer in selling direct whenever we can. Much of our wheat is sold through the Soil Association Organic Marketplace to organic livestock farmers in England. Whilst farming organically was a decision made many years ago, it still makes great business sense. Reducing reliance on inputs with high price volatility is a bonus. Selling direct to the customer completes the circular picture for this farm."

Growing Organic

Answering some common questions about organic arable production

Rotations: Do you need livestock to farm organically?

Unlike non-organic farms, organic arable farming is dependent on nutrients in the soil. As a result, legumes, green manures, cover crops and fertility building periods are essential to the success of organic cereal growing. The simplest rotations are two to three years of grass/clover followed by a cereal, a legume and an under-sown spring cereal with green manures grown in the overwinter gaps. Longer rotations are possible, with hungry crops like vegetables following a legume and competitive crops like oats following a weedy crop.

It is most common for organic arable farmers to introduce livestock to graze the grass/clover leys and to produce farmyard manure to support soil fertility but there are organic farmers running 'stockless arable' systems. This is becoming more feasible with increasing availability of anaerobic digestate alongside more traditional methods of building fertility such as fertility building leys, green manures and in some cases composted green waste materials. Organic farm gross margins tend to be higher from mixed farms than from stockless arable farms, but once labour costs and capital costs associated with livestock production are included especially where new infrastructure is required, stockless systems can outperform mixed farms.

Cultivation: Do all organic farmers rely on the plough?

Most organic farmers use ploughs as the main cultivation tool, although discs and non-inversion techniques do have a role. Stale seedbeds are a technique used to create a weed free seedbed and this can be done using shallow cultivations without ploughing. The simple rotation mentioned above would involve ploughing at most three times in six years. Innovative Farmers have run trials on terminating cover-crops with crimper rollers and are looking at living mulches of clover to provide a permanent understorey allowing direct drilling. These would provide a mulch and soil improver, without disturbing the soil, prior to drilling.

Weeds: Are all organic crops full of weeds?

Weed control is the biggest challenge for organic farming. There are now increasingly sophisticated mechanical options such as interrow cultivators, weed harrows, weed surfers and comb cutters. It is common to use higher seed rates to produce a more competitive crop to suppress weeds early in the growing season, and generally to select varieties on growth characteristics as much as yield data. Another weed control technique is drilling later in the autumn than on non-organic farms, meaning the crop is more competitive in the spring when weeds start germinating. The weed spectrum is different in organic cereals, weeds like cleavers and wild oats are less competitive because there are no fertiliser applications. Crop rotations, spring cropping and ploughing all reduce the influence of blackgrass but it can still be found on organic farms.

Pests and diseases: How can you tackle pests and diseases without sprays?

Diseases are less of an issue with organic crops, often considered to be due to lower nitrate levels in the plant making it less susceptible. Selecting more resistant varieties is a good strategy. The diverse nature of organic farms and the lack of insecticidal treatments leads to an increase in the number of beneficial insects reducing the problems associated with pests, although ferric sulphate is approved for slug control. No seed treatments are allowed in organic systems, but later drilling reduces the risks. Variety mixes are more common in organic systems, giving some possible extra protection against disease.

Crop varieties: What varieties are available organically? Can I use any seed?

The AHDB's 'Recommended Lists' can give some guidance on a variety's potential, but the 'untreated' figures relate to a crop where every input other than pesticides have been used. However, many researchers state that such trials are unhelpful for organic farmers, giving false rankings. Varieties with deep rooting characteristics to scavenge for nutrients, and good ground cover potential to suppress weeds, are best for organic systems. Where organic seed is not available, cleaned non-organic seeds can be used but a derogation must be obtained first. An online database—www.organicxseeds.co.uk—shows available organic seeds and varieties.

Crop nutrition: How do you get decent yields without artificial fertilisers?

No artificial fertilisers are allowed in organic systems, only ones from a natural source. Where there is a deficiency found, control bodies will give permission to use lime, phosphorus and potassium fertilisers from a list of approved products. Livestock manures can be used but must be composted for 12 months if from a non-organic source. Anaerobic digestate from some sources is approved, but this must be checked first. The use of deep rooting crops like sainfoin, chicory and fodder radish has been found to bring nutrients up from lower soil strata and there is some evidence that the absence of artificial fertiliser can improve the supply from the soil's reserves, perhaps by triggering improved soil bacterial function.

Supporting Organic

Securing organic opportunities post Brexit

We are seeing major changes in government thinking on agriculture and the environment, specifically through the Agricultural Transition Plan (ATP) in England. Moving away from simple area-based payments, the ATP focuses on supporting farmers for the delivery of public goods, such as healthy soils, improved water quality, climate mitigation and increased biodiversity.

Following extensive lobbying efforts, we are delighted to finally see organic included within the recently announced Sustainable Farm Incentive Policy (SFI)[9] and welcome DEFRA's acknowledgement of the benefits that organic farming offers the wider environment.

The Soil Association in partnership with the English Organic Forum (EOF) have urged DEFRA to recognise organic within the Agricultural Transition, including through SFI. This work has resulted in organic farmers qualifying for the higher level payments available through the SFI's soil standards, plus inclusion and reward of temporary leys in the arable land area. It has also ensured that organic farmers would be able to join Countryside Stewardship (CS) alongside SFI and not get caught out by 'double funding' for land receiving organic conversion and or maintenance payments. DEFRA have also agreed to explore the inclusion of a new organic standard in 2025 to provide an easy, holistic and accessible package for organic farmers.

The inclusion of organic as part of SFI is a promising sign for the future of farm payments. However, we must continue to lobby DEFRA to ensure our ambitions are realised. It was reassuring to hear Secretary of State, George Eustice say these words at the Soil Association conference on Agroecology:

"We are committed to a holistic organic standard. The benefits of organic farming are clear. I've visited organic farms and it is very clear what they deliver for nature, and I have been very clear throughout this transition that we do not want to undermine the business models of people who have already been doing the right thing over the last ten to fifteen years. It would be a sorry outcome if we put together all those incentives to try to change the farmers who have not been nature friendly farming to start doing the right thing but along the way omitted to protect the financial viability of those that have always been doing the right thing. So as we move away from BPS (Basic Payment Scheme) payments to future ones it is important that those that are doing the right thing see their income for agri-environment work increase and I think there is something to be said for a holistic organic standard recognising all that that entails"[10].

Soil Association and EOF will continue to support the sector by prioritising the following:

1. Help develop an organic standard in the ATP for 2025.
2. Strongly urge organic farmers to extend their existing CS agreements/enter into new ones before the end of 2023.
3. Engage with the development of all the SFI standards to ensure that organic farmers are adequately rewarded for the public goods that they produce, and at the same payment rates as for those same actions if carried out by conventional farmers.
4. Influence the development of Local Nature Recovery[11] to include certified organic farmland that delivers biodiversity gains as well as food.
5. Attempt to ensure that capital grants and productivity initiatives are relevant to organic farmers focused on resource efficiency and public goods delivery.

We are continuing to ensure that the devolved governments set the same ambitions targets and support for those who are already achieving such positive environmental outcomes.

Although 2022 application window is now closed in Scotland, we will continue our support for farmers and crofters interested in conversion.

In Wales we will press for organic conversion and existing organic farmers to be supported by the new environmental schemes when announced.

Keep up to date

CS rates are now on average 30% higher for most types of farmland than they were prior to 2022, with increases of between 50-110% for conversion rates. These rate changes came into effect in January 2022.

Countryside Stewardship Scheme (CSS) is a five-year agreement and organic conversion funding includes increased payments for the first two years, providing a financial boost for farmers through their conversion period. Under the 2022 CSS, **rotational land in conversion** to organic is eligible at the moment for payments of **£256/ha/year** for up to two years—**46% higher than pre-2022 rates**.

After 2024, farmers will be able to leave their existing countryside stewardship/ environmental stewardship agreements without penalty, if they wish to join the new Environmental Land Management (ELMS) schemes—so this shouldn't be a deterrent for applying for available conversion funding or extending existing organic agreements.

For up-to-date information on funding opportunities for organic farmers, visit the Soil Association's Financial information pages at www.soilassociation.org/organic-conversion-england

ORGANIC PERSPECTIVE

Andrew Bullock
Bradwell Sezincote Farm, 730 ha mixed arable, Gloucestershire

"We started the organic conversion process in 2019, to improve the environment and control blackgrass in our arable rotation. We've received CS funding to support conversion and have already received a premium for our in-conversion grains. We're due to sell our first organic crop for a premium this year. We're trying to grow crops for human consumption, milling wheat and oats, malting barley and trialling spelt and heritage wheat. There are plenty of markets out there and prices have risen to around 65% above conventional, which is about right.

The biggest positive is the reduction in risk. Although current high prices for conventional crops make margins look favourable, increasing fertiliser and other inputs costs are fast becoming a serious consideration. When we were farming conventionally, if we didn't achieve a good yield, a reasonable profit soon became a big loss. The other challenge was cash availability—we would need three times more cash up front. Organic crops will only see a small increase in costs.

The organic crops are currently looking good and due to their lower potential yield are better placed to find water and nutrients in dry times. Another week of dry weather and conventional crops lose much of their potential. Previously we were spending more money upfront without knowing where arable prices would be. With organic, the risks and input costs are lower, and farm profit is largely equal. I predict profit margins will continue to increase now that we're fully converted, and we're improving our environment, biodiversity and soil health.

I'd recommend anyone looking to convert should go for it! You can access stewardship funding and cross over into ELMS later. You can always consider a share farming agreement with a local grazier if you don't want to venture into livestock yourself, but still want the fertility.**"**

Going Organic

What is involved in conversion and certification

What is organic certification?

Organic farming is defined by EU law and therefore any product sold as organic in the UK must comply with a set of production and processing standards. DEFRA oversee approved certification bodies such as Soil Association Certification to provide organic certification and inspection services to organic farms.

Soil Association Certification is an approved organic certification body which is a wholly owned by the Soil Association Charity, certifying thousands of organic farms and processing businesses across the whole organic food and drink supply chain in the UK. They help businesses to navigate the requirements of organic conversion and certification, inspect farms to organic standards and provide them with an organic licence to sell products with use of the Soil Association Organic Symbol. As a not-for-profit business, any surplus income is gift aided to the Soil Association charity to develop, build and safeguard the organic sector. They certify all farm sizes and enterprises and provide organic certification for on-farm processing and packing.

Land and crop conversion

Before marketing land or selling animals or products as organic, farms must undergo a 'conversion period' where land and animals are managed to the organic standards for a required period. This provides time to start establishing organic management techniques and build soil fertility and biological activity. The conversion period for land is typically two years, although there is scope to reduce this if it can be demonstrated that land has been managed according to organic standards before entering conversion. Perennials will also require a further twelve months on top of the standard two-year period before the crop can be harvested as organic. To produce an organic annual crop, seed must be sown into and harvested from land that has completed its conversion period and has organic status. Crops harvested during the second year of conversion can be sold as 'in conversion'. For more information on organic conversion please view Soil Association Certification's crop conversion guide[12] and livestock and poultry conversion guide[13].

Annual inspections and support

Organic certification includes a physical inspection of the farm every year to look at land, livestock, crops and records to verify that all organic production rules are met. Every Soil Association Certification farming licensee is assigned an experienced certification officer, responsible for managing their organic certification and signposting to business support. An application inspection is undertaken by Soil Association Certification auditors. Soil Association Certification provides a range of benefits for their clients including joint audits, organic market insights, marketing materials and support and organic farming communications.

Find out more about certification

Get in touch with Soil Association Certification's expert producer team to find out more about organic certification and conversion and how it can work on your farm.

Call: 0117 914 2412

Email:
goorganic@soilassociation.org

Visit:
www.soilassociation.org/certification/farming

Useful contacts

Soil Association Certification

T: 0117 914 2412 E: cert@soilassociation.org

Soil Association Charity

T: 0117 314 5100 E: producer.support@soilassociation.org

Defra Organic Team

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Innovative Farmers

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Natural England

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Organic Research Centre

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Organic Trade Board

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Useful information

Downloadable version of this report
Organic farming statistics
UK Organic Market Report
Technical information on organic arable farming

References:

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10 YouTube—Nature & Net Zero & Food Security? Exploring the agroecological solution Nature & Net Zero & Food Security? Exploring the agroecological solution
11 Defra—Environmental Land Management schemes: overview (March 2021)
12 Soil Association Certification Conversion Guide—Arable and Horticulture
13 Soil Association Certification Conversion Guide—Livestock and Poultry

Get in touch

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www.soilassociation.org/arable-report