

Scotland Foreword

Scotland is leading the way for the whole UK in organic innovation.

A new Organic Action Plan, launched in January 2026, highlights the Scottish Government's long-standing commitment to organic. It's a practical roadmap for growth that benefits the economy while also contributing to net zero, biodiversity and Scotland's international reputation for high-quality food and drink.

The plan was developed by key stakeholders across the sector alongside the Scottish Government, and this spirit of collaboration will fuel delivery, with investment, guidance, research, market intelligence and supply chain support that boosts the sector and unlocks new routes to market for Scottish produce.

The action plan has also enabled, for the first time, publication of a Scottish Organic Market Report, highlighting key areas of opportunity for domestic producers.

A Scottish success story

Scotland's organic sector is driven by consumer demand. The value of the organic market has grown 20.6% in five years*. More recent figures from NielsenIQ show the market in Scotland is now worth £155 million[^], growing nearly 3% in volume sales over the last year. This report also highlights where Scottish producers can step up to meet demand, for vegetables, eggs, dairy, beef and lamb.

Between 2021 and 2024, the area of Scottish agricultural land committed to organic production (either fully organic or in conversion) grew by 27%, with consistent policy support from the Scottish Government alongside an ambitious commitment to double the area of organic land by 2026.

Five pillars of the Scottish Organic Action Plan 2026-2029



1. Develop Research, Training and Advisory Services
2. Raise Awareness of Organic in Scotland
3. Develop Organic Supply Chains and Markets
4. Facilitate Conversion and Maintenance of Organic Land
5. Promote Public Procurement of Organic Produce

This provides a solid foundation from which to develop the market further, with the government already pledging to continue support for conversion and maintenance through the Agri Environment Climate Scheme (AECS) until at least 2030.

Amanda Brown, Programme Director, Scotland Food & Drink says, "Scotland is leading the UK in organic production, and we're excited to help drive the next stage of growth. More consumers are choosing high quality organic food and drink, and the Scottish Organic Action Plan gives us a clear path to build on that momentum. It sets out practical steps to boost production and strengthen supply chains. We're delighted to play our part in turning this plan into real progress for Scotland's organic sector."

*Worldpanel by Numerator Take Home Purchasing | 52 w/e to 20 April 2025



**SCOTLAND
FOOD & DRINK**



Scotland Market overview

Scottish
organic market
was worth
£155m
in 2025[^]

Rising sales of eggs, dairy and ambient grocery are boosting the Scottish organic market

In 2025, organic food and drink in Scotland outperformed non-organic – growing 10% in value and 2.9% in volume – despite a modest 1% share of the total Scottish food and drink market. Volume growth was fuelled by strong performances in organic dairy, produce and ambient grocery. Fresh milk (+10%), eggs (+7%), carrots (+2.5%), meat, fish and poultry (+2.2%, growth from poultry coming back onto supermarket shelves) and oats (oat milk, porridge and oatcakes +2% combined) fared particularly well in 2025[^].

There is an opportunity to grow and process more staple organic crops in Scotland, ensuring the economic and environmental benefits stay within the country rather than relying on imports.

Scotland's retail landscape

Scotland's retail landscape differs from the wider UK in organic sales. Tesco overtrades significantly in organic (33% share),** largely due to its dominance in store numbers, compared to other retailers. Growth is driven by retailers' ranging, with Tesco and Sainsbury's consistently stocking core organic lines like milk, eggs and carrots. Strong availability and accessibility boost purchases and expanding these ranges, especially in convenience stores, could further accelerate growth.

Tesco and Sainsbury's are investing in organic via loyalty schemes, with strong results, but shoppers seeking more than the core lines are looking elsewhere.

Volume performance by category 2025[^]

Category	% share of organic (units)	% growth (units) YoY
 Dairy	24.6%	+4%
 Fresh Produce	19.6%	+3%
 Ambient Grocery	13.8%	+4%
 Baby Food & Milk	12.4%	-11%
 Impulse	4.9%	-3%
 Deli & Convenience	3.4%	+11%
 Confectionery & Soft Drinks	2.6%	-9%
 Meat, Fish & Poultry	2.2%	+55%
 Frozen	0.3%	+3%

Waitrose overtrades in Scotland thanks to its broader organic range. While independents, farm shops, box schemes and farmers' markets connect consumers to Scottish provenance and the organic story.

Four key opportunities for retailers

1. Build organic ranges to enable a cross-category organic shop.
2. Stock organic products with Scottish provenance and highlight on pack.
3. Trial different merchandising strategies, like clustering, to engage the Scottish consumer.
4. Highlight occasions like Organic September to drive sales and build understanding.

[^] NielsenIQ Scantrack data for the Organic Food & Drink category Scotland Food & Drink defined for the 52 week period ending 3rd January 2026 Value & Unit Sales Scotland Total Coverage © 2026 The NielsenIQ Company.

** NielsenIQ Homescan Food & Drink Share of Trade, data for the Organic category Scotland Food & Drink defined for the 52 week period ending 27 Dec 2025 Scotland Total Coverage © 2026 The NielsenIQ Company.

The remaining 16.2% organic share is split across multiple smaller categories

Scotland

Meet the organic shopper

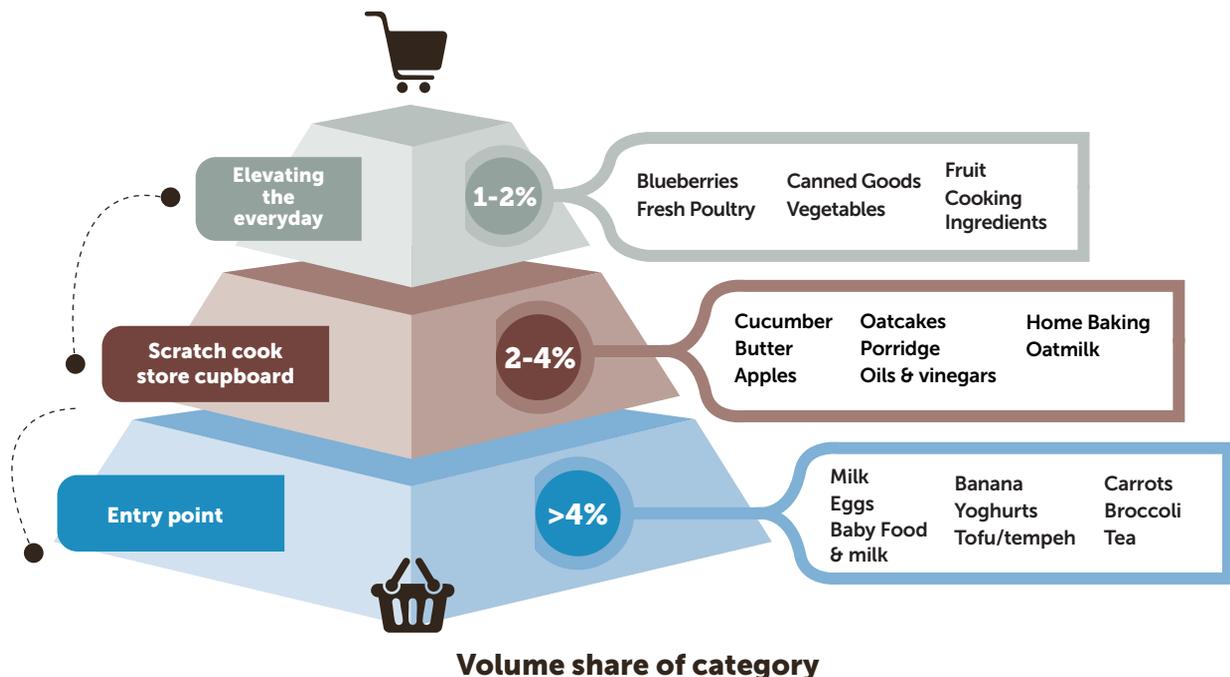
- 35-44 year old shoppers spend the most per buyer on organic.^[1]
- Over half (58%) of spend is coming from more affluent (ABC1) shoppers.^[2]
- 71.8% of Scottish organic volume comes from heavy buyers.^[2]
- People with lower incomes have a higher proportion of organic spend in Scotland, compared to Great Britain.^[1]
- Scottish shoppers are most likely to seek improved availability, more competitive pricing and clearer labelling.^[3]



Both individuals and families are driven by health and wellness considerations for both themselves and their loved ones. Supermarkets' ranging decisions affect shoppers' spending patterns. For example, busy young parents aren't finding a full organic range on-shelf, which leads to them buying non-organic instead.

When looking at Great Britain as a whole, organic is most popular in London and the South East. However, Scotland has experienced the strongest growth in organic engagement, as England's capital declines slightly.^[4] More than half (53%) of Edinburgh stores offer an organic option, lower than in London (72%),^[5] suggesting that increased ranging in Scottish stores would entice more shoppers to buy.

Scottish organic pyramid



Source: NielsenIQ Scantrack data for the Organic Food & Drink category Scotland Food & Drink defined for the 52 week period ending 3rd January 2026 GB Total Coverage © 2026 The NielsenIQ Company. Categories chosen with organic market value >£1m



Customers want Scottish produce

Glasgow-based social enterprise Locavore supplies organic veg boxes to customers from Ayrshire to Edinburgh. The business recently expanded into a new 20-acre site at Barnhill Farm.

Locavore founder Reuben Chesters has seen first-hand the demand for organic food in Scotland – with sales up +8% across the social enterprise’s two shops year-on-year.

“We struggle to get hold of enough Scottish-produced organic vegetables [to meet demand],” he says.

“We’re also struggling to keep up with demand for Scottish organic eggs – which customers are keen to buy.”

Reuben has shown that demand for high-quality organic food isn’t solely driven by more affluent shoppers. Locavore’s latest social impact report revealed that 28% of its box scheme customers had a household income of less than £30,000 and 28% have an income of over £70,000, demonstrating the breadth of its customer base.

There is a further opportunity to attract the younger customer, as a recent research study showed that 61% of respondents aged 25-44 would be “more likely to buy” a certified organic product.^[6]

As in the rest of the UK, organic supply in Scotland doesn’t meet consumer demand – with much recent growth coming from imported food and drink. This presents a clear opportunity for retailers to increase their share of organic trade with smarter ranging and price promotions – two tactics that effectively deliver results.

An opportunity to engage

There’s also the chance to drive awareness of organic among Scottish consumers – particularly engaging them with the unique benefits of homegrown organic food and drink.

Scottish consumers really value provenance as a sign of quality and environmental credentials. Retailers can capitalise on shoppers’ desire to buy Scottish products, especially those which have organic’s additional health and environmental benefits.

As well as increasing shelf presence and tactical use of price promotions, press and social media are proven tools to drive sales. Research from Edinburgh University demonstrated a correlation between positive press coverage (particularly regional coverage) and social media activity on organic with a rise in sales.^[7]

[1] Worldpanel by Numerator – GB Take Home Panel, 52 w/e 30 Nov 2025 %buyer, Organic vs Non-Organic GB & Scotland

[2] Worldpanel by Numerator, GB Take Home Panel, 52 w/e 25 Jan 2026 Organic % buyers by spend, Scotland

[3, 6] Scottish Provenance Research July 2025 56 Degree Insight for The Knowledge Bank

[4] Worldpanel by Numerator, GB Take Home Purchasing | 52 w/e to 20 April 2025 Organic % Share of Food & Drink Spend & 5yr Growth GB vs Scotland vs London

[5] The University of Edinburgh Global Agriculture & Food Systems Report

[7] “Effectiveness of real-world marketing of organic foods and beverages: A systematic review of recent evidence” – Edinburgh University, Aug 2024



25
certified
caterers across
1,511
sites

Scotland **Catering**

Supplying organic food to Scotland's public sector; including schools, universities and workplaces, offers more people the chance to enjoy sustainable, nutritious produce every day.

At the 2025 Scottish Organic Gathering, Stuart Aitken, Head of Food for BaxterStorey Scotland, noted that organic stands out for both quality and taste. He added that raising awareness of the benefits of organic among customers is key to building growth in the public sector.

"We have a conversation with our customers – we say we can offer a better-tasting product, sourced from a much better system," he said.

"Organic produce is at the heart of what we're driving towards".

Andrew Kennedy, from East Ayrshire Council, agreed that *"organic needs to be normalised in public spaces"* to see more sector growth.

"Understanding where food comes from is a real strength – one that the organic sector can speak to in terms of its production methods," he said.

He concluded that ultimately getting more organic into the public sector is *"about our children's health"* – suggesting that policy makers have a responsibility to create change.

Sparking a food revolution on campus

When General Manager Alan Ratcliffe and his team at BaxterStorey began working toward the Food for Life Served Here certification at Glasgow Caledonian University (GCU), it wasn't just about ticking boxes. They focused on reshaping the culture of food on campus: how it's sourced, cooked and reflects the university's values.

"In a higher education environment, the easy route is volume and speed," Alan explains. "But we saw an opportunity to do something different, to champion craft and creativity, and put local community at the heart of what we do".

Food for Life Served Here is a certification from Soil Association Scotland that recognises healthy, sustainable and Scottish food served up in public and private sector organisations. GCU gained Food for Life Served Here Bronze certification in 2024, highlighting its commitment to good food.

Aiming higher

With the support of BaxterStorey, GCU then set its sights on Silver certification – which rewards a deeper attention to healthy options, Scottish sourcing and requires more organic ingredients.

Achieving Silver meant a shift in how meals were sourced and prepared. Ingredients had to be traceable and responsible: free-range eggs, higher-welfare meat, sustainably sourced fish and local produce like Mossgiel Organic Dairy milk from Ayrshire.

This shift from convenience to conscience required increased spend on organic produce - even at bronze level 75% of meals must be freshly prepared from scratch. No easy challenge in a university setting serving upwards of 220,000 meals a year.

To drive GCU's vision, Alan and his team focused on sourcing smarter. They began using Mungoswells' organic flour in fresh-baked focaccia, blending it with other flours to stretch the budget. Mossgiel Organic Dairy milk became a staple in dishes like mac and cheese. Simple changes, applied creatively, started to add up.

"The response from students and staff has made it all worth it," says Alan. "People care about what they're eating, it's our responsibility to serve food that's good for them and good for the planet."



Food for Life Silver and Gold caterers in Scotland

- Local authorities: Stirling and East Lothian (Silver) and East Ayrshire (Gold)
- Public sector: BaxterStorey Scottish Government workplaces (Silver), BaxterStorey Glasgow Caledonian University (Silver), Heritage Portfolio Royal Botanic Gardens Edinburgh (Silver).

"It's encouraging to see the new NielsenIQ data, which shows volume growth in organic in Scotland out pacing non-organic food and drink. It is clear that organic has growing economic potential. Wholesalers are a crucial link in the chain for the success of the organic market in Scotland, and the Scottish Organic Action Plan offers a real opportunity to maximise the use of Scotland's wholesale networks for Scottish, organic sourcing, supporting Good Food Nation ambitions and strengthening regional economies."

**Colin Smith, Chief Executive,
Scottish Wholesale Association**

Putting more organic peas on plates

The humble pea is helping kick-start an organic food revolution across Scottish kitchens and dining halls.

The Give Peas a Chance! pilot project launched in April 2024, giving pupils at Aberdeen City Council schools the chance to enjoy locally Aberdeenshire-grown organic dried split peas.

It's one of nine innovative pilots from Sustain's Bridging the Gap programme connecting organic growers with the local community. The pilot was so successful that funding has been extended to other councils in Scotland.

"Growing peas is an important part of our crop rotation and helps keep the farm's soils healthy," says Phil Swire, pea producer. "I'm delighted to be able to supply locally grown ingredients into the school meals service, allowing more pupils to give peas a chance!"

At the heart of the project is opening fresh routes to market for this local and organic plant protein, allowing pupils to access healthy and sustainable food. School menus have risen to the occasion by showcasing what peas can add to a plate. Pupils have been trying kitchari rice and even pea cookies and choc-pea brownies – which have been a huge hit.

Embedding through education

The new pea recipes have been accompanied by educational activities to show the pupils the farm-to-fork story of the peas. Royal Highland Education Trust (RHET) has launched a series of educational resources and Royal Northern Countryside Initiative (RNCI) is running classroom talks in select schools.

Impact in Aberdeen City



amount **recirculated**
in the **Scottish**
economy for every



spent by the
council

Source: [Give Peas A Chance! Impact Report, Nov 2025](#)

Credit Matthias Kremer



Going for growth

Diversification and export opportunities are driving sales at Mossgiel Organic Farm in East Ayrshire

Mossgiel Organic Farm has ambitious plans to get even more people buying its award-winning cow-with-calf produced milk.

Founder Bryce Cunningham says that sales grew 10% in 2025. And now the business is going for 30% growth in 2026.

It's planning for expansion through new butter and cheese launches, plus an online shop where consumers can buy products direct. The dairy is also exploring selling to retailers in London (which has the highest concentration of organic shoppers in the UK⁽¹⁾) – among other exciting export opportunities.

Currently, half of the dairy's sales go through wholesalers, with the remaining half split between doorstep delivery and sales direct to coffee shops.

"Visiting the coffee shops is one of my favourite parts of the job," says Bryce.

"You can make direct connections with small businesses and get to tell the story of why we're so passionate about organic milk. We like to collaborate with wholesalers so they understand exactly where we're coming from. This helps us reach more niche customers."

Bryce says that animal welfare and trust in organic are the top reasons people choose the farm's products, alongside the eco-appeal of reusable glass. Shoppers actively want more places they can buy Mossgiel – which means expanding into supermarkets without compromising what the brand stands for.

Export excellence

With export opportunities expanding both within the UK and abroad, the organic salmon industry demonstrates how to maximise the value of Scottish provenance. Laura Mailer, Head of Sales at Cooke Scotland says:

"Customers today care about where their food comes from, how it's raised, and its environmental impact. Organic salmon delivers on those expectations through strict welfare standards, lower stocking densities, certified organic feed, and full traceability from farm to fork."

"Despite wider economic pressures, the market for premium, responsibly farmed salmon remains resilient. Our experienced farmers and support teams' commitment to quality and sustainability continues to drive strong export demand in the UK and beyond."



Scotland Farming

Organic farming is surging in Scotland. Defra figures reveal the country achieved a 13% increase in organic farmland in 2024 – topping 131,500 hectares^[1]. The Scottish Government has consistently supported farmers to convert to organic through the Agri Environment Climate Scheme (AECS). More farmers have been able to access this funding since the funding window opened at the end of February 2026.

Momentum driving the sector was evident at Soil Association's sold-out Scottish Organic Gathering, held in Fife in November 2025. At the event David Erskine, Livestock Procurement Manager at ABP Beef, shared how one supermarket was looking to increase organic red meat volume by 20-30% in 2026. With organic beef cattle herds increasing in Scotland, the country is primed to meet this kind of demand.

The market will be accelerated by Scotland's Organic Action Plan – which will support existing organic products and bring new ones to market.

Despite customers seeking out higher welfare meat and retailers looking to increase their volumes of beef and lamb, availability is poor in Scotland. There is an opportunity to serve those Scottish shoppers looking for higher welfare Scottish-reared meat that delivers on environment, health and quality.

On the horticultural side, Bex Goldsmith from RBOrganic Ltd. highlighted the opportunity for vegetable growing in Scotland. Scotland's climate is naturally suited to growing organic root vegetables with guaranteed frosts and cold North Sea breezes. As climate change bites, these kinds of conditions are no longer guaranteed in England.

"Evolving innovation allows us to be smarter with the organic land that we have," she added.

"New advancements in weeding technology, and our experience, have allowed us to increase production, as well as quality – without compromising our soil."

The organic opportunity is also opening doors for Scotland's organic egg producers – like Lower



Scotland is proving to be an organic success story

"We're seeing increased numbers of farmers coming into organic – and 14 years of consecutive growth in the UK's organic market. So it's about capitalising on the opportunity and building on what we already have."

**David McKay,
Soil Association Scotland**

Mill of Tynet, a family-run mixed organic farm. A six-year supermarket contract for organic eggs has led to a £2.2 million investment in boosting production. The long-term contract helps give the family security driven by demand for organic.

This is particularly good news for Scotland since the nation is a major egg importer. More homegrown eggs help grow the organic market in Scotland and spread the benefits of organic farming locally.

Growing opportunities for Scottish oats

Oats are a much-loved Scottish food. And consumers' appetite for organic oats is increasing – as seen in core products like porridge, oatcakes and oatmilk. They're increasingly being identified by experts as useful for lowering cholesterol and maintaining heart health as consumers turn against ultra-processed food (UPF) for more natural choices produced without pesticides.

[1] DEFRA Organic Farming Statistics United Kingdom 2024

Despite the benefits, Scottish organic oats can be surprisingly difficult to find on Scottish supermarket shelves, as customers are frequently met with imported products.

“Scottish organic oats and other arable crops, particularly beans and peas as alternatives to imported soya, represent significant import substitution opportunities. Through supply and value chain development support, SAOS is working with growers to help realise these opportunities as a core pillar of Scotland’s Organic Action Plan. We encourage producers, processors and buyers across these value chains to get involved and explore the potential for a more coordinated Scottish supply.” Adam Forrest, Co-op Development Manager, SAOS.

Organic growers have highlighted their enthusiasm for working together to meet the market demand. This will mean boosting storage and processing capacity while learning lessons from adjacent categories like pulses and beans.

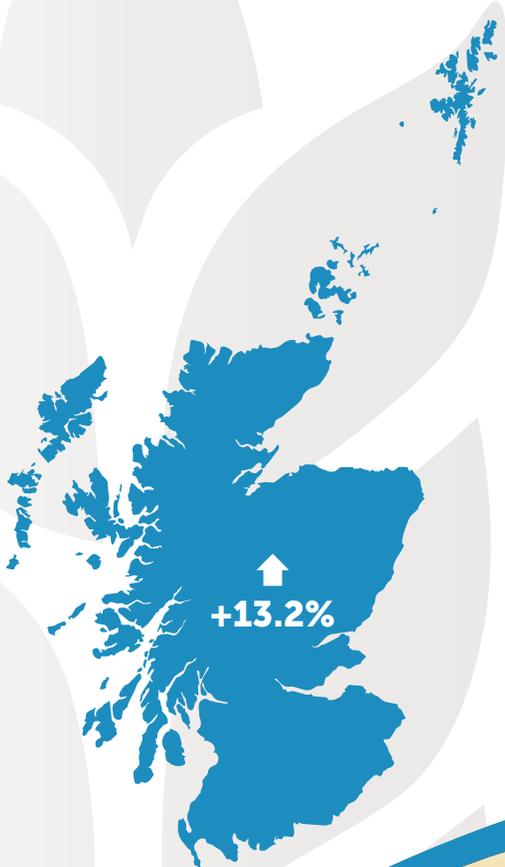
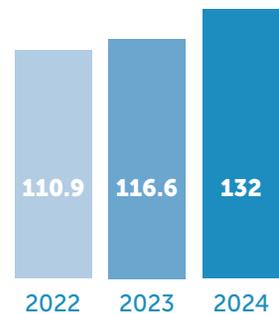
Organic oats have built-in advantages. They tend to have [lower mycotoxin levels](#) due to rotations and crop breaks – a major plus for growers. Investment in production has the potential to increase supply of organic products to Scotland’s supermarkets, displacing organic imports and so shifting the wider food system toward sustainability, soil health and biodiversity.

Distribution of organic land and processors/producers (hectares 000s) in 2024

Scotland

Distribution of organic land and processors/producers (hectares 000s)

Processors/Producers:
530 (+1.7%)





Scottish Organic Growth Opportunities



Strong market momentum

Organic in Scotland is outperforming non-organic, with solid value and volume growth driven by dairy, eggs, produce and ambient grocery.



Expanding certified land

Organic land is increasing rapidly, supported by long-term government funding and Scotland's Organic Action Plan.



Retail growth opportunities

Broader ranges, better availability (especially in convenience), smarter merchandising and price promotions can unlock demand.



Scottish provenance advantage

Consumers value locally produced organic food, creating opportunities to reduce imports and grow domestic supply. 80% of Scottish shoppers would be "more likely to buy" a product with a Scotland flag on it.



Public sector expansion

Schools, universities and workplaces integrating organic can provide stable and scalable routes to market.



Supply gaps to fill

Shortages in Scottish organic vegetables, eggs and higher-welfare meat present clear opportunities for producers.



Innovation & diversification

New product development, direct-to-consumer sales, wholesale collaboration and export markets offer further growth potential.

www.soilassociation.org/scotland

