

# Organic Farming in the United Kingdom

THE SOIL ASSOCIATION

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## 1 History and Development

The organic movement in the UK has a long history. Sir Albert Howard carried out his famous work on composts in India as long ago as the 1920s. The oldest organic farms stretch back to the 1930s, when the rest of the world was just starting to follow the chemical alternative. The earliest back-to-the-land proponents exhibited a bewildering range of philosophies, from Utopian socialists to those flirting with the blood and soil fantasies of the national socialists. They constituted little more than an eccentric minority. The organic movement only really gained coherence and an overall vision with the publication of Lady Eve Balfour's book "The Living Soil" in 1946 and the establishment of the *Soil Association* (<http://www.soilassociation.org>) a couple of years later (Dudley / Woodward 1997).

These early pioneers only had a fairly tenuous link with the modern world of organic agriculture. There was no organic food premium, no standards, no regulations and a far broader interest in "whole food" issues than there is today. The priorities of the U.K. movement were mainly directed towards proving the theories expounded in "The Living Soil". To that end, the Pye Research Centre was established at Haughly in Suffolk, to carry out a series of long-term trials that continued over twenty years (Dudley / Woodward 1997).

## 2 Organisations

There are many organic organisations in the UK some of which have been of particular importance for the organic sector (Dudley / Woodward 1997):

The *Soil Association* (<http://www.soilassociation.org>), which celebrated its 50th anniversary in 1996, emerged as the most powerful advocate in terms of a public face and political lobbying. It has also played a key role in developing organic standards both in Britain and through the European Union. It is also a membership organisation. Certification is carried out by Soil Association Certification Ltd.



The Soil Association and other environmental organisations have launched a campaign for the Government to adopt a target of 30 percent of agriculture (the agricultural area) and 20 percent of food consumption in the United Kingdom to be organic. It had the support of a third of the Members of Parliament in April 2000.

For Gardeners the Henry Doubleday Research association (HDRA; <http://www.hdra.org.uk/>) has created a vibrant alternative to chemical methods, both throughout the early advocacy of its founder Lawrence Hills and inspirational work of Jackie and Alan Gear, which has led to the development of a National Centre at Ryton Gardens, TV series, books, articles and HDRA's position as the largest organic membership organisation in Europe.



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Research was initially confined to independent organisations, of which the largest and best known is Elm Farm Research Centre (EFRC; <http://www.efrc.com/>), based on a working organic farm in Berkshire, England.

### 3 Statistics

By April 1999 more than 240,000 hectares of land was registered and managed organically in the UK by 1.356 producers, representing 1.2 percent of the total agricultural land and 0.7 percent of the farmers. One quarter of this organically managed land had gained full organic status by April 1999 and was therefore able to produce organic food. The remaining 180,000 hectares was classed as in conversion.

### 4 Land Use

In April 1999, 79 percent of the 60,000 hectares classed as fully organic were grassland (permanent pasture, temporary leys and rough grazing). In addition to this the vast majority of the land classed as in conversion will be grass, due to the requirement for fertility building during the conversion period.

Only 21 percent or 12,600 hectares of organic land was classed as 'cropped' (arable, horticultural and fruit production). Whilst the area of organic crop production has grown significantly it is not increasing as fast as the area of grassland. The apparent reluctance of arable farmers to convert, combined with the large increases in organic livestock production, will further increase reliance on imported organic cereals.

### 5 Differences in Organic Production within the UK

Within the UK there are considerable differences in terms of the scale and type of organic production.

#### 5.1 England

The government funded Organic Conversion Information Service (OCIS); (<http://www.maff.gov.uk/environ/envsch/ofc.htm>) in England has received about 7,000 enquiries since its launch in July 1996, with the majority of these enquiries coming from dairy and livestock farmers. By April 1999 organically managed land in England accounted for 135,000 hectares of which almost 100,000 hectares was in conversion. Between November 1999 and April 1999 in England alone, Soil Association Certification



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LTD was receiving applications for producer registration averaging 4,000 hectares per month.

The number of licensed organic processors in England rose dramatically from approximately 400 in April 1998 to 700 in April 1999. Whilst this increase is welcome, the continued growth in dedicated processing facilities is a vital component for continued expansion of the sector.

## 5.2 Northern Ireland

In Northern Ireland organic production is still at a very small scale compared to the rest of the UK. Only 200 hectares is under organic management, with an additional 100 hectares in conversion. Considerable growth is expected in the near future with more than 20 producers, representing 600 hectares, contemplating conversion.

The limited growth in organic production in Northern Ireland is partly due to a limited distribution and processing infrastructure. Livestock enterprises form the majority of the agricultural sector so abattoirs and livestock processing facilities for organic farmers are therefore particularly important. Considerable effort is being made to develop the organic sector further in the region with the development of several major initiatives.

## 5.3 Scotland

The rate of conversion of farmland has been higher in Scotland than any other part of the UK. By April 1999 over 100,000 hectares (2.5 percent of total agricultural land) was licensed and managed to organic standards. Approximately 80,000 hectares of this entered conversion from April 1997 to April 1999.

Over 70 percent of the land in conversion and about 90 percent of the land with full organic status in Scotland are classed as hill or rough grazing, maintaining extensive livestock production. Less than 2.5 percent of this land is used for arable or horticultural cropping, compared with over ten percent for the UK as a whole.

Whilst much of this land would receive little fertiliser under conventional management, there are additional benefits to its organic conversion; the conversion of whole upland farms to organic production inevitably results in a reduced stocking rate and often a more even balance between cattle and sheep grazing. Thus in the uplands there has been a gradual return to more traditional farming systems and a move away from maximising livestock subsidy payments and the consequent overgrazing.

## 5.4 Wales

Organic farming in Wales shows a similar pattern to that in Scotland. By January 1999 there were 3,182 hectares of fully organic land with an additional 2,149 hectares in conversion. Currently organic production is concentrated in West and South Wales with relatively few producers in North or Mid Wales. Over 80 percent of the agricultural land is classed as Less Favoured Area, with livestock enterprises predominating. Of the farmers converting to organic production in Wales, it is estimated that 65 percent can be



categorised as beef and sheep and 15 percent as dairy. The remainder represent mixed livestock and cropping farms with some horticulture.

Various initiatives to help encourage the development of the organic sector in Wales are underway, with several EU funded regional development projects for disadvantaged areas.

A key feature of the strategic review of food & agriculture by the Welsh Development Agency (<http://www.wda.co.uk>) was the adoption by the National Assembly for Wales of a policy initiative for organic farming. Policy tools include an action plan (“Welsh Agrifood Action Plan for the Organic Sector”, adopted in March 1999) to establish a national centre of excellence, integrated strategies for market development and the extension of production and processing capabilities. A target to achieve 10 percent of agricultural output produced organically by 2005 has been set. Adequate funding to support the achievement of these goals is yet to be confirmed.

## 6 Standards and Certification / Regulation No. 2092/91

The first set of organic standards were published as guidelines by the Soil Association in 1967, and the Soil Association Organic Marketing Company, now Soil Association Certification Ltd., was set up in 1973 to inspect and certify organic food. Today, the Soil Association standards (<http://www.soilassociation.org>) are the most widely recognised with over 70 percent of the organic food in Britain coming under their inspection system, although there is a total of five approved inspection bodies.



- Scottish Organic Producers Association



- Biodynamic Agricultural Association



- Organic Certification UKZ Organic Farmers & Growers Ltd



- Organic Food Federation





- Soil Association (<http://www.soilassociation.org>)

In 1983 the British Organic Standards Committee was established by the organic organisations.



This was later superseded by the government led UK-register of Organic Food standards (UKROFS); (<http://www.maff.gov.uk/environ/envsch/ukrofs.htm#terms>). UKROFS is responsible for implementing the Council Regulation (EEC) 2092/91 ([http://europa.eu.int/eur-lex/en/lif/dat/1991/en\\_391R2092.html](http://europa.eu.int/eur-lex/en/lif/dat/1991/en_391R2092.html)) on organic production in the UK.

## 7 State Support

Currently, the Ministry of Agriculture Fisheries and Food (MAFF); (<http://www.maff.gov.uk/>) spends over £ 3 billion (4.8 billion Euro) each year on supporting agriculture, but only three percent is spent on the agri-environment budget within the programme Organic Farming Scheme, OFS (compared to an average eleven percent across Europe). Only eight percent of the agri-environment budget is currently spent on organic farming (£ 6.2 million; 9.9 million Euro). This works out at 0.2 percent of the total UK spending on agriculture.

Regardless of the Government's stated objectives for sustainable development in agriculture (*'Sustainable Development : The UK Strategy'* 1994, Government Report), the vast majority of the resources that are spent by the Government, both in support payments and in investment in technologies such as genetic engineering, are still directed towards the conventional approach to agriculture. Despite the increasing attention being paid to environmental and food safety issues, in practice the pursuit of cost efficiency, global competitiveness and free market policies are still the dominating concerns.

Funding in Scotland is provided by the Scottish Executive Rural Affairs Department (SERAD); ([http://www.scotland.gov.uk/who/dept\\_rural.asp](http://www.scotland.gov.uk/who/dept_rural.asp)), which is the equivalent of the Ministry of Agriculture. Changes to the SERAD Organic Aid Scheme have been proposed to the EU, but must be approved by the Scottish Parliament, and should be in operation by late 1999. The proposed changes relate only to the payment rates (which equate more or less to those in the new MAFF Organic Farming Scheme (OFS); <http://www.maff.gov.uk/environ/envsch/ofs.htm>). It is likely that further changes will be made to the SERAD OAS in 2000, when a merging of all or most of the Agri-Environment Schemes in Scotland has been proposed



The payments under the Organic Farming Scheme (OFS) are summarised in table 1. They are still valid until November 2000. From December 2000 on, there will be new payment rates. Farmers that practise organic farming already longer than five years do not get any payments under the OFS.

Table 1: Payments under the OFS

Type of land	British pounds (£)/ EUR per hectare					
	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Eligible for AAPS* or under permanent crops	225 / 360	135 / 216	50 / 80	20 / 32	20 / 32	450 / 720
Improved land not eligible for AAPS*	175 / 280	105 / 168	40 / 64	15 / 24	15 / 24	350 / 560
Unimproved land	25 / 40	10 / 16	5 / 8	5 / 8	5 / 8	50 / 80

\* Arable area payment scheme

Source: MAFF 2000 (<http://www.maff.gov.uk/environ/envsch/ofsch.htm>)

There is an additional payment per organic unit of £ 300 (480 Euro) in the first year, £ 200 (320 Euro) in the second year and £ 100 (160 Euro) in the third year. These payments recognise additional costs arising from, for example, training and organic certification.

It is not permitted to pay twice for the same activities, and where the environmental prescriptions imposed by the OFS are paid for under another agri-environment scheme the OFS payments will be reduced as appropriate. As a general rule the reduced payments will be as shown in table 2.

Table 2: Reduced payments under OFS

Type of land	British pounds/ EUR per hectare					
	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Eligible for AAPS* or under permanent crops	225 / 360	135 / 215	14 / 22.4	14 / 22.4	14 / 22.4	402 / 643.2
Improved land not eligible for AAPS*	146 / 233.6	76 / 121.6	13 / 20.8	13 / 20.8	13 / 20.8	261 / 417.6

\* Arable area payment scheme

Source: MAFF 2000 (<http://www.maff.gov.uk/environ/envsch/ofsch.htm>)

## 8 Agenda 2000

In December 1999, Government announced intention to implement the “modulation” option of the Agenda 2000 policy reforms. An increasing percentage of CAP support payments to all farmers will be directed to fund UK agri-environment schemes. This will increase support for the Organic Farming Scheme (OFS), the five year conversion



scheme, from nine million British pounds (14.4 million Euro) to an average of 20 million British pounds (32 million Euro) annually from 2000 to 2001.

## 9 Marketing

The whole retail value for organic produce in the UK is £ 500 million (800 million Euro), which is about one percent of the total UK food retail sales to households.

### 9.1 The Wholesale Value of Organic Production in the UK

The total wholesale market value of UK produced organic food can be estimated at over £ 77 million (123.2 million). This reflects an increase of over 20 percent in the sector from 1997/1998 to 1998/1999 compared with an increase in fully organic land over the same period of approximately 33 percent. The discrepancy in these percentage increases can be attributed to new land with full organic status carrying livestock enterprises (such as beef production) which require long lead times before yielding organic output.

This wholesale market value does not account for the further processing of multi-ingredient products. For example, the inclusion of baked products, baby foods, preserves, beverages and confectionery would greatly increase the overall wholesale value. Over the last 12 months this is likely to have increased from £ 16 million (25.6 million Euro) to over £ 20 million (32 million Euro).

### 9.2 Food Processors

The number of businesses licensed for the processing of organic foods in the UK has risen from just over 500 at the end of 1997, to over 800 by April 1999. This includes businesses licensed to process for both human consumption and animal feed, it also includes licensed importers/exporters, distributors/packers and wholesalers of organic products.

Many of the registered processors deal with a range of products and have several enterprises listed on their licence. An analysis of licensed processors by enterprise type and location reveals they are not evenly distributed around the UK. For example, the greatest number of licensed animal feed suppliers and abattoirs are concentrated in the main livestock regions of England. This results in a less well developed infrastructure in some of the other important livestock areas of the UK. Other licensed processors for whom location is less important (eg. preserves, condiments etc) tend to be more evenly distributed around the UK.

Consistent with the low level of organic production in Northern Ireland the processing infrastructure is also very limited. Scotland and Wales also have fewer facilities than all the regions within England. The most commonly listed enterprises by licensees are packing/distribution and fresh produce (table 11). The highest concentration of processing facilities clearly reflects the areas with the highest concentration of organic production.



The total value (domestic plus imports) of the organic market in the UK at the processor level was over £ 300 million (480 million Euro) for the year ending April 1999, 45 percent of this, approximately £ 130 million (208 million Euro), was in the fruit and vegetable sector.

### 9.3 Imports and Exports

The volume of organic exports from the UK is negligible. With most commodities the UK continues to require imports to satisfy market demand. A few primary products however, notably organic mushrooms and salmon, were exported during 1999. In addition some multi-ingredient, processed products were also exported.

Surveys were carried out of major wholesalers and processors to determine the level of imports to the UK. The UK organic market remains highly dependent on imports. Despite the growth in UK production, the level of imports is still increasing.

The import of dairy products has increased from about ten percent to an estimated 30 percent since 1997/98. Despite the increased UK production of organic milk, the requirements are such that imports are increasing particularly for butter and liquid milk for processing. Likewise imports of organic meat in 1997/98 were negligible, but have now risen to over four percent. The imports are predominantly pig and poultry meat.

In organic fruit and vegetables the sector remains most dependent on imports. More than 80 percent of all organic fruit and vegetables sold in the UK are imported. While a proportion of this could not be produced in the UK, there is clearly potential for a considerable increase in the domestic production of vegetables. Some wholesalers of organic fruit and vegetables highlighted the considerably higher rates of conversion aid offered in some EU countries, particularly for perennial fruit crops, as a cause of low rate of conversion by fruit growers in the UK.

Consistent quality and reliability are essential if UK supplies are to be depended upon. Historically the market has been supplied by a large number of small scale producers which has occasionally given rise to variations in quality. The conversion of larger producers who are often more technically and commercially experienced is expected to help the development of the home market.

Major grain traders highlighted an increased requirement for imported cereals. The import of cereals for human consumption remained at about 50 percent. There was however increased need for imported cereals for animal feeds. Given the rapid growth in organic livestock and the relatively slow growth in organic arable production in the UK, the requirement for imports is expected to increase further.

### 9.4 Food Retailing

The upsurge in consumer demand for organic produce has led all the major retail outlets to recognise the potential of the organic sector. Overall sales of organic food showed an annual rise of 40 percent to over £ 390 million (624 million Euro) for 1998/99 with the multiples increasing their market share over the last twelve months.



## 9.5 The Consumers

Health is a primary influence for consumers when purchasing organic food. Consumer awareness of food safety and environmental issues has increased significantly during the past few years. Highly publicised food scares have led to a growing concern about the food we eat and the environmental consequences.

There has been a boom in interest in food, with a plethora of cookery programmes, new magazines and countless press articles dedicated to organic issues. The Soil Association generated and/or featured in over 1,000 articles in the first three months of 1999 alone. Food is increasingly being associated with pleasure, travel and leisure, 43 percent buy organic for the taste.

The majority of consumers develop their interest in organic food for their own benefit, or that of their family. As these health and food quality needs are satisfied their interest deepens to embrace wider issues such as environment and animal welfare.

Consumers want more information about organic food and farming. They are interested but the issues can be confusing. Accurate and accessible information would lead to an increase in purchasing. In a recent survey carried out by Beaufort Research for the Welsh Consumer Council, 58 percent of the 1,006 people sampled said there is not enough information available to consumers about organic food.

## 10 Training

There are several institutions – private and state run – offering courses in organic farming.

The following universities and private institutions offer courses and Higher Diploma, BSc or MSc:

- Broomfield College at the University of Derby (<http://www.broomfield.ac.uk>): higher diploma and national certificate in organic agriculture, different courses in organic horticulture and organic gardening
- Welsh Institute of Rural Studies (<http://www.wirs.aber.ac.uk/research/organic.shtml>) at the University of Wales:
- Otley College of Agriculture and Horticulture (<http://www.otleycollege.ac.uk>): national certificates in different fields of organic agriculture
- Lackham College of Agriculture: national certificate and higher national diploma in different fields of organic agriculture
- Pershore and Hindlip College of Horticulture (<http://www.pershore.ac.uk>): Higher national diploma in organic agriculture

Special Courses in biodynamic farming are offered by:

- Emerson College (<http://www.emerson.org.uk>)



Specialist short courses for farmers are offered by:

- Elm Farm Research Centre (<http://www.efrc.com>).

There are several other institutions that provide courses in the field of organic gardening and vegetable growing and some more that have organic options within their general courses.

Courses for consumers and other interested people are offered by the Henry Doubleday Research association (HDRA); (<http://www.hdra.org.uk/>), the Centre of Alternative Technology (<http://www.cat.org.uk>) in the west of Wales and by Pershore and Hindlip College of Horticulture (<http://www.pershore.ac.uk>). With the help of the organisation Willing Workers on Organic Farms (WWOOF); (<http://www.phdcc.com/wwroof/>) one may spend time working on an organic farm.

The Soil Association (<http://www.soilassociation.org>) runs an approval scheme for the organic courses mentioned above and produces a list of the approved courses.

## 11 Advisory Service

### 11.1 Organic Conversion Information Service

The Organic Conversion Information Service (OCIS); (<http://www.maff.gov.uk/environ/envsch/ofs.htm>) helpdesk is funded by Ministry of Agriculture Food and Fisheries & the National Assembly for Wales' Agriculture Department. The service consists of dedicated helplines, written information packs, and free farm advisory visits provided by the Organic Advisory Service at Elm Farm Research Centre and ADAS (<http://www.adas.co.uk/netscape/index.htm>). ADAS is the former state and now private advisory service for agriculture. The growing interest in conversion to organic production has been reflected in the growth of OCIS clients by almost 250 percent 1999 in England and Wales, and similar trends are apparent in parallel schemes in Scotland and Northern Ireland.

To Scottish farmers, free advice and information on converting to organic farming is provided by *Scottish Agricultural College - SAC* (<http://www.sac.ac.uk/cropsci/external/organic/default.htm>). This is the equivalent of the OCIS scheme in England and Wales, although not formally referred to as such. As in other parts of the UK, in Scotland demand for advice on organic conversion has rocketed over the last two years, primarily because of buoyant organic product prices, very depressed conventional prices, and anticipation of improved Organic Aid Scheme payment rates. In the year to 31 March 1999, SAC responded to over 1,100 enquiries on organic conversion, approximately four times as many as in the previous year.

In Wales, around 1,500 enquiries have been received by the OCIS helpline (<http://www.maff.gov.uk/environ/envsch/ofs.htm>) since the scheme was launched in



October 1996. These enquiries have led to the delivery of 1,000 free on-farm advisory visits. The average farm size receiving a full day OCIS visit was 95 hectares.

## 12 Research

Elm Farm Research Centre, a pioneering research institute, has covered amongst other topics, nitrate leaching from organic systems, use of legumes and green manures, inter-cropping, municipal composting, stockless organised systems, grass leys, and the benefits of organic farming to wildlife.

More recently academic bodies have also initiated organic research programmes, most prominently at the University college of Wales in Aberystwyth, the Scottish Agricultural College (SAC), the newly established Aberdeen University Centre for Organic Agriculture (<http://www.abdn.ac.uk/pss/ugorgagri.hti>) and Reading University, and at government funded institutions at Trawscoed, Terrington and Redesdale.

The Ministry of Agriculture spends over £ 125 million (200 million Euro) each year on agricultural research and development, with an additional £ 52 million (83.2 million Euro) on agricultural biotechnology. The amount it spends on organic farming is only £ 2.1 million (3.4 million Euro), 1.2 percent of the total.

## 13 Challenges and Outlook

In the Organic Food and Farming Report the following recommendations are made to the government:

- A fundamental reform of UK agricultural policy that places the environment, health and social factors as genuine priorities and has a clear strategy.
- Organic farming to be adopted as the best mainstream policy option for meeting all the objectives of UK agriculture.
- Re-allocation of the majority of agricultural support and research funds towards encouraging public benefits from agriculture (environmental, social and food safety) instead of to supporting production.
- Recognition that achievement of a completely sustainable agriculture cannot be left to the market, but that a mix of market premiums and Government support are needed for organic farming.
- Specific policy tools that are recommended:
- Adoption of a specific action plan on organic farming in the Government's Rural Development Plan.
- Rationalisation of the different agri-environment schemes into a single, voluntary management agreement scheme that offers all farmers a two-tier hierarchy of economic incentives to farm using sustainable methods. This should have a baseline tier



that pays for a minimum level of environmental protection above ‘good agricultural practice’ and a higher tier for certified organic farming, with additional options according to the specific regional environmental and landscape requirements.

- Use of the new Agenda 2000 opportunities to liberate greatly increased new funding for the development of organic farming in the UK and to re-direct the development of UK agriculture as a whole towards organic farming.
- Systematic application of the “polluter pays” principle, for example the introduction of a pesticides tax.
- A national network of regionally based advisory, training and demonstration facilities for organic farmers.
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