ORGANIC IN EUROPE

PROSPECTS AND DEVELOPMENTS

IFOAM EU GROUP 10 YEARS MAKING EUROPE MORE ORGANIC

FiBL

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IFOAM EU GROUP 10 YEARS MAKING EUROPE MORE ORGANIC

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FOREWORD

The organic movements are custodians of good food and good farming promoting the diversity of European food culture, safeguarding the long-term vitality of our countryside and contributing to development of a truly green economy underpinned by agro-ecological approaches. Fundamental to the organic movement is the necessity for agricultural methods to support people, place and environment based on the principles of organic farming – health, ecology, fairness and care. Today organic agricultural land represents 5.6% of all EU agricultural land, whilst Europe is the second largest market of organic products, valued at EUR 20.8 billion in the EU-28 (EUR 22.7 billion in Europe as a whole) for 2012 and growing. Organic farming in the EU has continued to record substantial growth with the area of organically managed agricultural land almost doubling over the last decade.

This publication provides an overview of developments and future prospects from the perspective of public policy support and market growth. EU agricultural and food policies continue to have a significant impact on the development of organic farming not only in the EU-28, but also across Europe influencing market trends in EU Candidate and Potential candidate countries as well as countries within the European Free Trade Association (EFTA). Divided into three sections the publication firstly assesses the latest developments in EU organic food and farming policy, secondly it considers case studies of organic farming policy in action both in the EU and other European countries and finally it provides a detailed overview of organic farming and market development in Europe from the latest market trends to detailed reports of the sector in different countries. We hope that the information presented in this publication will be a valuable resource for organic stakeholders, policymakers, journalists, and other interest parties.

It is published at a timely moment, as IFOAM EU, part of the global IFOAM family, embarks on the development of a shared vision for organic in Europe. Our Organic Vision for 2030 launched in November 2012, when IFOAM EU marked 10 years of advocacy for sustainable food and farming in Brussels, our Organic Vision for 2030 seeks to build on the foundations of our organic priorities for next two decades. This will help us to confront new challenges related to the principles of organic farming and market development and help us to ensure that organic farming remains the pioneering force in sustainable agriculture.

We wish you an enjoyable and informative read and invite you to get involved in our Organic Vision for 2030 and so help make Europe more organic.

Christopher Stopes
IFOAM EU President

January 2014

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EU ORGANIC FOOD AND FARMING POLICY

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Stephen Meredith, Antje Kölling, Emanuele Busacca[1] and Bram Moeskops[2]

INTRODUCTION

Demand for good food and good farming is on the rise in Europe. People of all ages, including farmers and citizens, are hungry for change and want to see better food and farming policies based on agro-ecological approaches (Eurobarometer, 2011; Good Food March, 2012). In recent years, EU policymakers have slowly come to recognise the dual role of organic farming. On the one hand, it strives to meet the consumers' demand for high quality products; on the other, it fulfils an important role in securing certain public goods. This includes, for example, the protection and improvement of water and soil quality as a result of organic land management practices (European Commission, 2004). That understanding began to emerge in the early 1990s, when organic farming was legally defined under EU Regulation (EEC) No 2092/91, and when organic farming support payments for conversion and maintenance were introduced under the Common Agricultural Policy (CAP). Over time, recognition of organic farming has also extended into other EU policy areas, such as research, and some areas of market development (Dabbert *et al.,* 2004; Stolze and Lampkin, 2009). However major gaps still remain in many policy areas, which undermine a supportive climate for local and organic food chains. Meanwhile, EU citizens are also voting with their feet, with the EU organic market valued at EUR 20.8 billion in 2012. Yet, despite the growing consumer demand in many EU countries, supply remains insufficient to meet that demand. Not only do EU citizens favour organic methods of production, but a high proportion also believe farmers should receive encouragement to produce more organic products (Eurobarometer, 2010). Researchers and policymakers now also recognise the potential of agro-ecological practices and innovation (IAASTD, 2008; SCAR, 2011; Levidow *et al.,* 2013). Studies show, however, that a supportive climate for organic farming is critical as farmers not only require public support for agro-ecological approaches, backed by a strong demand for organic products, they also need to perceive the policymakers' commitment to the development of the sector (Offermann, *et al,.* 2009; Sanders *et al.*, 2011). This chapter outlines some of the opportunities and challenges that influence the new and existing EU policy frameworks for organic food and farming, and the agri-food sector, as well as ways that can help make Europe more organic.

FOSTERING ORGANIC AGRICULTURE IN A GREENER AND FAIRER CAP

Greening direct payments for all farmers

For the first time, public good delivery constitutes a significant part of both direct payments and rural development.[3] Under Pillar 1 of the CAP, direct payment eligibility depends on farmers undertaking three basic agronomic practices – crop diversification, the protection of permanent grassland and the allocation of 7 % of farmland as ecological focus areas. Collectively, these are known as the greening component. This new element represents 30 % of national funding for Pillar 1. Furthermore, under Pillar 2 Member States are legally required to spend at least 30 % of their rural development budgets on environmental measures, including commitments in support of organic production and agri-environmental climate protection practices which go beyond the Pillar 1 greening.

The introduction of greening marks the beginning of a process towards normalising public good delivery across the entire CAP. Organic farming is deemed to be *ipso facto* greening compliant. This acknowledges the public good delivery aspect of organic farming as the only EU-wide certified, systemic approach to sustainable agriculture. The recognition can be seen as a strong political signal from EU policymakers that they view organic farming as a priority model of agricultural sustainability, and as an active contribution to the protection and enhancement of biodiversity, as well as for climate change mitigation and adaption (IFOAM EU Group, 2010). On the other hand, the low level of ambition of the greening measures as well as the introduction of questionable exemptions will severely curtail the potential of greening to drive public good delivery. For instance, in the European Commission's original proposals the greening component referred to all farms[4]. However, in the final political agreement the measures are targeted primarily at arable farmers and will probably have very little impact on livestock farming. The concept of equivalency, whereby practices undertaken as part of agri-environmental measures or special certification schemes exempt farmers from greening requirements, also weakens the greening component. Ultimately, therefore, achieving a genuine paradigm change in agricultural sustainability will require corrections and improvements to be made in subsequent reforms.

Recognising organic farming as greening compliant

From the perspective of organic farming, the ultimate impact of greening recognition will depend on how the CAP Regulations are implemented. For instance, there might be significant adverse impacts if Member States use the recognition as an excuse to neglect support for organic farming under Pillar 2. Member States must therefore guarantee a more confident and dynamic support framework for the progression towards sustainable agriculture in Europe, by ensuring that greening is combined with strong support for organic farming under Pillar 2. Support for organic farming is based on the requirements set out under EU Regulation (EC) No 834/2007, as well as national legislation. It reaches beyond the scope of the greening objectives. Pillar 2 payments must therefore provide comprehensive support for organic farming, with recognition serving as a positive signal of the EU's commitment to sustainability that can help to drive agro-ecological transformation throughout Europe.

Advanced sustainability in rural development

Whereas the orientation of Pillar 1 towards public goods delivery is a welcome development, measures under Pillar 2 are still the main drivers for the growth of organic farming and greater sustainability in rural areas. In the new rural development programming period of 2014 to 2020, organic farming is to be viewed as a measure in its own right, with support available to certified organic farmers or groups of farmers for a period of five to seven years, on a per-hectare basis. Payments are designed to compensate farmers for additional costs incurred and income foregone, and to cover transaction costs such as increased management efforts, certification costs and training and advice.[5] Today most authorities in the Member States offer organic support payments under their national or regional rural development programmes (RDPs). However, support levels differ between and within Member States, and they often fail to adequately cover all the extra costs, or to take into account the reduction in yields organic farmers might face (DG AGRI, 2013; Pohl, 2009). Therefore, organic farming support payments must represent a significant top-up compared to conventional farm support payments, in order to provide farmers with strong incentives to convert to and maintain organic farming. In the new programming period, organic farmers are also still eligible for optional agri-environment-climate payments that go beyond the requirements of organic production, such as the preservation of indigenous animal breeds or the conservation of plant genetic resources. However, the provision of combination payments is at the discretion of Member States; it can be made organic-specific or may apply to all farmers, varying significantly across national and regional RDPs (Schwarz *et al*, 2010). To stimulate more far-reaching agro-ecological approaches, organic farming systems should be clearly prioritised under new agri-environment-climate schemes.

Combining organic farming support with other RDP measures

New RDPs also continue to offer options for combining organic farming support with other RDP measures, such as farm investments, diversification, advisory services, information and promotion activities, and producer groups. Explicit support for organic farming is now more visible in a number of measures. For instance, organic farmers are now eligible for a 20 % higher rate of support for investments that improve farm sustainability and performance or activities related to processing, marketing and farm product development. Furthermore, the organic sector can also be supported in EU information and promotion activities, while the new CAP Regulations state that organic advisory services should be covered by the Member States' farm advisory systems. Other measures are also relevant to organic sector, such as support for diversification of non-agricultural activities, assistance with the setting-up of producer groups, and support for collaborative initiatives related to the environment and climate change, the formation of short supply chains, or innovation. In some Member States organic farming is explicitly mentioned or specifically prioritised in similar measures under RDPs for 2007-2013. However, provisions under these measures vary significantly between countries and within Member States, with many authorities failing to go beyond the classical agri-environmental area payments model by introducing a more holistic model combining organic support payments with other RDP measures (Sanders *et al.*, 2011; Schwarz *et al.*, 2010 IFOAM EU Group, 2012a). The greater visibility of organic farming in other relevant RDP measures, such as investments and advisory services, provides new opportunities to mainstream organic farming in RDPs.

Stimulating agro-ecological innovation in the new EIP-AGRI

Of particular interest in terms of mainstreaming organic farming in rural development is the acknowledgment by EU leaders of the need for agro-ecological innovation to redirect European agriculture onto a more sustainable path. Innovation is a priority of the next programming period, and will be promoted through the newly established European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI). This is an EU policy instrument supported jointly under Horizon 2020 and rural development policy until 2020. The main objective of the EIP-AGRI is to bridge the gap between research and farming practice by encouraging stakeholders from different areas of the agri-food system – farmers, businesses, researchers and advisers – to share ideas and experiences, develop innovative solutions to current problems and challenges, and to put the results of research projects into practice. Under the Rural Development Regulation, the EIP-AGRI asserts the need for progress in the development of agro-ecological production systems, emphasising the important role of organic farmers at the heart of innovation activities supported by the new RDPs. The EIP-AGRI therefore offers a lot of potential to promote the development of agro-ecological approaches by building on the strengths of organic farming, addressing its existing weaknesses and taking advantage of new opportunities for innovation (IFOAM EU Group *et al.,* 2012a).

Much of the work implemented under the EIP-AGRI will be conducted by operational groups. These groups are meant to build bridges between different stakeholders to tackle specific practical problems and will be supported as a voluntary measure in the Rural Development Regulation. This means that it will ultimately be up to national and regional authorities rather than EU officials to determine the objectives and the content of the EIP-AGRI in the Member States. It is therefore vital that these authorities support the operational groups that embed organic and agro-ecological problem solving in the new initiative. The EIP-AGRI will also act as a catalyst to boost the flow of information and foster exchanges of knowledge and expertise across projects, sectors and borders. It will link farmers, advisors, agri-businesses, researchers and civil society to form a network – the EIP Network – facilitated by the EIP-AGRI Service Point.[6] One particularly welcome development has been the creation of a 20-member focus group on optimising organic arable yields, headed by the European Commission. This brings together various different stakeholders. It is looking at ways of increasing yields on less productive organic farms, so that they match the higher levels of production on other farms using similar farming systems. The focus group will collect existing knowledge (from scientific reports and projects, as well as practical experience) that can contribute to innovative solutions, while also identifying specific areas where new research is needed. It will also be able to propose the topics and criteria for future operational groups, as well as tools and methods for knowledge sharing.

A new common framework for the Cohesion Fund and Structural Funds

The programming period for 2014 to 2020 also offers the potential to prioritise and increase the visibility of organic farming, not only under RDPs, but across a range of different EU policy frameworks as programmes are linked to a new EU instrument called the Common Strategic Framework (CSF).[7] This will pursue a set of clear investment priorities for the financial planning period 2014-2020, in Member States and their regions. Here, for the first time, an effort is being made to connect rural development with the Cohesion Fund and other EU structural funds. This should encourage better policies, while combining funds with other efforts to meet Europe's growth and jobs targets for 2020, as well as national priorities. The CSF is also linked to other EU policy instruments such as CAP direct payments, Common Fisheries Policy (CFP) and the EU Framework Programme for Research and Innovation, Horizon 2020. Commitments between the European Commission and the national and regional authorities for the next seven year period are set in the partnership agreements. With greater institutional recognition of the social, economic and environmental benefits of organic food and farming, prioritisation in these agreements provides opportunities to mainstream organic farming across the new RDPs and other EU policy frameworks.

CAP spending 2014-2020

Agricultural policy is the only sector that is almost entirely funded by the EU, with the bulk of funds spent on annual direct payments and market measures (100 % financed by the EU) while the remainder are allocated to multi-year rural development measures which are also co-financed through national and regional budgets. For over a decade, Pillar 2 measures have orientated the CAP toward the long-term competitiveness and sustainability of farming enterprises, and toward greater economic diversification and quality of life in rural areas. Member States have also been obliged to build up their available funding for rural development through so called modulation – moving funds from Pillars 1 to 2. Despite the trend towards greater support for rural development over the last ten years, Pillar 2 spending is still just a fraction of that for Pillar 1. Over the next seven years (2014-2020), rural development will account for just 9 % of the total EU budget, compared to the 29 % provided for direct payments and market measures. A comparison of figures for 2013 and 2020, for example, would see a reduction of -18 % for rural development (from EUR 13.9 billion to EUR 11.4 billion) compared to -13 % for direct payments and market measures (from EUR 43.2 billion to EUR 37.6 billion). If voluntary modulation is included the reduction for 2020 would rise to -19.7 % (Little *et al.,* 2013).

Furthermore Member States now have the possibility to modulate 15 % of their direct payments and rural development funds from Pillar 1 to 2, but also in the opposition direction from Pillar 2 to Pillar 1. Through what is known as reverse modulation, some Member States can even move up to 25 %.[8] Member States also have the option to adjust the percentage for specific years during the programming period.[9] It is still unclear how Member States will decide to use these options, with some likely to make full use of the reverse modulation option, while others will choose modulation to close the gap in Pillar 2 spending which results from budget cuts. While the new CAP places a stronger emphasis on public goods delivery across both Pillars 1 and 2, the low level of ambition with respect to greening, coupled with the threats of reverse modulation and cuts to the Pillar 2 budget, could seriously undermine support for organic farming and other measures that could potentially contribute to the development of more sustainable food and farming in Europe.

Taking stock of EU organic legislation and policy developments

In addition to support under the CAP, EU legislation on organic food and farming has continued to develop since EU Regulation (EEC) No 2092/91 was established in the early 1990s. This development process also included a full revision of the Regulation, culminating in the adoption of EU Regulation (EC) No 834/2007. Since its adoption, rules on its implementation have been agreed, detailing the organic production, as have specific rules on organic wine,

organic yeast and organic aquaculture. EU organic regulations seek to develop a harmonised approach to consumer protection, preventing unfair competition and ensuring common standards for organic production, labelling and marketing in the EU. At the same time, private and other national organic standards build on the EU requirements reflecting the specific cultural, structural, geographic and climatic diversity of individual Member States and regions, and help to pioneer innovation in organic standards across the sector. Since they constitute the only EU-wide sustainability label for food, organic standards and certification can help boost sustainable agriculture, while highlighting the scope for increased sustainably across the whole agri-food sector (IFOAM EU Group, 2012b).

A review process of organic policy and legislation initiated by the European Commission in 2012 is expected to culminate in the development of a new EU Organic Action Plan in 2014, and the replacement of EU Regulation (EC) No 834/2007 in the next EU legislative term 2014-2019. This should enhance the development of the EU framework for organic food and farming by striking a balance between policy aspirations and legislative necessity. That could affect issues ranging from the incomplete and unreliable collection of data and the outstripping of production by market demand, to the lack of specifically organic inputs such as seeds, young animals and protein feed, as well as the administrative burdens that discourage smaller-scale farmers and operators. It is important to remember that the current Regulation only came into force in 2009. Therefore, the review must consider that the aims, objectives and principles of the existing Regulation have not yet been fully exploited through the development of additional implementing rules, and that any improvements to the regulatory and policy framework must be seen in the context of ongoing developments in organic farming. The review process must also facilitate coordinated and coherent responses between EU organic legislation and the new EU food and farming policy frameworks for 2020, such as the CAP and Horizon 2020.

Ensuring organic legislation is fit for purpose

It is essential for any review that the legislative goals and objectives reflect the rich diversity of opportunities and challenges facing organic food and farming across the EU. While EU policymakers have the ultimate power to decide between small improvements to EU legislation or an entirely new regulation based on organic principles or market forces, they must remember that any changes will have significant implications for the organic sector's future in Europe.[10]

For instance, a market-driven approach could place too much emphasis on market-orientated outcomes, resulting in fewer strict legal requirements and sacrificing organic principles. For example, moves to secure on a permanent basis any exemptions granted to Member States under the current Regulation, or to reintroduce the option of national ministries authorising imports could have a seriously adverse impact on the development of truly sustainable organic agriculture, and incur the risk of competition distortion between Member States.

A principle-driven approach could help to orientate organic production more closely to the principles set out in the Regulation, while strengthening the standards. However, if this would necessitate the removal of elements of flexibility or exemption rules available to Member States, this approach would not be fit for purpose and could impede the sustainable development of organic farming. Sector realities in different Member States and regions must be taken adequately into account. Whilst some exemptions are no longer necessary, others need to be modified in line with the progressive increases in standards that the organic sector has delivered since the inception of the Regulation. However the immediate removal of all the exceptional rules would be inconceivable today, since a number of them remain critical for certain production sectors and in geographical areas where the organic sector is still in its infancy.

Therefore, a mix of the different approaches is needed to ensure a good balance between the fundamental principles of organic farming and the long-term development and expansion of the European organic sector. Changes, such as the introduction of group certification systems (which are currently only accepted in developing countries outside Europe), or the requirement that processors and traders measure the environmental performance of their activities, present opportunities. Group certification systems in the EU, for example, would enable groups of small-scale farmers to gain certification as single entities, thereby decreasing the bureaucratic burden of certification; and greater environmental performance requirements for processors could build on sustainability standards delivered by organic growers and livestock producers in order to move EU organic food to an even wider concept of sustainability. Regulation (EC) No 834/2007 has been an important driver of the organic sector in Europe. A new regulation should continue to support the development of the sector by enabling a process orientated approach that advances standards in the direction of the fundamental organic farming principles. Consumers and producers should work hand in hand to support the growth of the sector, with EU and national policy frameworks contributing to this dynamic through new EU and national organic action plans.

A new EU Organic Action Plan

Interest in organic farming is growing in the context of EU food and farming policies, as policymakers begin to appreciate the multi-layered significance of organic systems and sustainable food and agriculture. This ranges from the production of high quality food products and the delivery of public goods, to job creation and the stimulation of the agri-food sector and rural economies. Nevertheless, a coherent organic policy framework with a mix of policy measures is still needed in order to exploit the full range of benefits provided for by organic production. Following the implementation of a number of actions set out in the 2004 EU Organic Action Plan, such as specific standards for organic wine and aquaculture, the Commission's announcement of a new EU Action Plan in 2014 is a welcome initiative.

This should foster the continued development of the organic sector until 2020. The final outcomes of the 2004 Action Plan also provide the impetus to take stock of progress towards a coherent organic policy framework at EU level, including not only the achievements, but also an assessment of where work still needs to be done. For instance, better links are needed between national organic actions and national and regional RDPs, as outlined in Action 6 of the 2004 Action Plan, in order to establish greater coherence of policy frameworks for the organic sector in Member States (Sanders *et al.*, 2011). This is an area in which more work still needs to be done in order to mainstream organic farming in new RDPs by 2020.

The EU and national organic action plans clearly need to be complementary, in order to ensure the right outcomes are achieved across Member States and regions. Consequently, all action plans up until 2020 should benefit fully from all EU policy frameworks. They should:

- make best use of all relevant instruments and measures under the CAP, from organic and agri-environmental support payments to tools that support knowledge transfer and innovation, market development and capacity building
- mainstream organic approaches in EU research programmes and innovation tools, in order to promote greater transition to agro-ecological approaches
- align the organic regulations with the horizontal legislation more effectively, such as labelling and the regulation of farm inputs
- increase the availability of quality protein feeds by promoting local protein feed production and exploring alternative protein sources
- increase the availability of organic seeds and propagating material by financing long-term breeding programmes for locally adapted and organic plant varieties that enhance agro-biodiversity and maximise the yield potential of organic farming
- launch a new promotion campaign for organic products, associated with the EU organic logo, while prioritising organic farming in educational programmes and green public-sector procurement
- improve the collection of organic data, which is currently collected by researchers and Member States' authorities, but is not sufficiently harmonised for it to be used effectively by policymakers and stakeholders
- enhance legislation to protect the organic sector from GMO contamination
- support the registration of organic, traditional plant protection substances under horizontal legislation.[11]

For more information on national and regional organic action plans in Europe, see Chapter 4 in this volume.

EU research policy and organic funding scenarios

Since the early 1990s, organic issues have been gradually taken up into the EU research policy framework. Until the 1980s, research activities on organic farming had been carried out mainly by private research institutes, with the first EU projects on organic farming funded in the 1990s. Since then, the EU budget for organic research has increased from EUR 767 000 in 1993 to more than EUR 6 million in 2013. This makes the EU an important investor in organic research, and as such also in the development of the sector. It is therefore crucial to understand the different EU policy instruments for research and innovation, and how these can be influenced. The EU's most important funding instrument for research for the period 2014-2020 is the EU Framework Programme for Research and Innovation Horizon 2020, with a total budget of almost EUR 80 billion. As outlined above, support for agricultural innovation implemented under the EIP-AGRI comes from both Horizon 2020 and the new RDPs. Horizon 2020 addresses three key areas: *scientific excellence*, *industrial leadership* and *societal challe*nges. The last of these is particularly important for the agricultural sector (especially the issue of food security, sustainable agriculture and forestry, marine, maritime and inland water research, and the bio-economy). With at least 5 % of the total Horizon 2020 budget (EUR 4 billion) allocated to address *societal challenges* for the next seven years, the budget for these research areas has almost doubled compared to the previous programming period.

New instruments under Horizon 2020 include multi-actor projects and thematic networks. These will be used to fund specific projects contributing to the EIP-AGRI. Multi-actor projects are intended to involve different stakeholders (researchers, farmers, advisors, enterprises, educators, NGOs, administrations and regulatory bodies). They are targeted at the needs and problems facing farmers and other practitioners. They also seek to foster participatory research – something with which the organic sector already has broad experience, for example, through on-farm breeding programmes. Thematic networks, on the other hand, will focus on specific themes, mapping the current state of existing scientific knowledge and best practice. The networks will help to develop materials that facilitate knowledge exchange, and which are easily accessible. Like the multi-actor projects, thematic networks should involve all the relevant stakeholders, and provide a platform for actors in the organic sector to exchange their knowledge at EU level. Given the sector's long history of strong collaboration across disciplines and between researchers and producers, the multi-actor approach presents opportunities. Moreover, many of the calls for multi-actor research projects are expected to be specifically relevant to organic agriculture, for example calls related to soil quality and function, or genetic resources and agricultural diversity. The EU's big investments in research notwithstanding, the majority of research funds are still managed by Member States. Research funds of relevance to organic farming and sustainable food and agriculture include CORE Organic, ERA-Net SUSFOOD and the Joint Programming Initiative on Agriculture, Food Security and Climate Change (FACCE–JPI).[12] These examples of Member States pooling national research funding are supported by the EU. The aim is to establish greater coherence between the EU and national research policies.

Organic perspectives of the broader EU policy framework

While EU organic legislation and polices, such as the CAP and policies on research and innovation, affect organic farming directly and indirectly, other EU policies also have signifcant implications for the development of agro-ecological approaches. A paradigm shift towards sustainability in EU food and farming also depends on EU rules and regulations that empower rather that impede the growth of small and local businesses and sustainable consumption. Organic farmers have always been pioneers of sustainability of food and agriculture, offering solutions that not only benefit the rest of organic sector, but which can also inspire the entire food and farming sector. Below, a number of organic stakeholders share their outlook, and describe the challenges facing farmers and consumers with respect to other areas of EU policy that affect the future of our food and farming.

Rules adapted for small and local farm businesses

Many organic farms engage in on-farm processing and direct marketing. While these activities allow them to generate added value, implementing the 2004 EU food hygiene package has been difficult for the farmers of many Member States, since they incur additional costs in meeting strict requirements. Some farmers have had as a result to give up processing altogether. Meanwhile, Member States often do not properly implement the flexibility provisions, which permit adapted rules and derogations for primary producers engaged in direct supply chains involving small quantities of primary products, or for local retailers supplying directly to consumers.[13]

Hygiene rules have an impact on the processing sector, leading to greater consolidation of processing facilities. For example, many small slaughterhouses have been forced out of business due to a combination of strengthened hygiene rules and economic constraints. This limits the opportunities for organic farmers to deliver their products to certified organic processors within an appropriate distance of their farm.

Andrea Ferrante, AIAB, Italy

Farmers who want to build up local and short food chains or diversify their farms must face EU legislation that is made for large scale food factories and widely transported processed food that has a long shelve life. They also face seed marketing rules that disregard the importance of farmer-led breeding activities the support the maintenance of agro-biodiversity and the future of food security.

The EU is a Union of diverse regions - it must promote the diversity and sovereignty of food cultures and therefore must:

- *implement adapted food safety rules for small scale food processing and local food marketing*
- *allow free exchange and sales of seed and planting material between farmers without any registration or certification requirements. We must remember that farmer to farmer sales are built on trust*
- *maintain genuine food quality schemes of geographic origin, encourage the uptake of sustainability aspects in the quality schemes and promote the combination of geographic indications with organic farming.*

GMO-free food and farming

Despite the fact that a majority of European consumers reject genetically modified organisms (GMO) in food (Eurobarometer, 2010), the risk of GMO contamination in food is still not being properly addressed by the EU. The organic sector still incurs high costs in preventing this risk. For example, there have been several instances of GM maize contaminating organic fields in Spain, which led to farmers losing their organic certification and their premium prices. Many of these organic farmers consequently stopped growing maize in traditional maize growing regions, resulting in the loss of local varieties. In 2009, processing companies working with soy and maize reported costs of about EUR 20-86 per tonne for the prevention of contamination (Stolze and Then, 2009).

Dorota Metera, Organic farming expert, Poland

EU legislation must give consumers and farmers the freedom to choose food and feed that is free from genetically modified organisms (GMO). Not only do consumers want GMO-free food, but GMOs and the industrial farming methods associated with them put our environment and health at risk. Whilst organic food and farming is by definition GMO-free, the current legal situation in many Member States does not protect GMO-free producers.

The cost of keeping GMOs out of the food chain through segregation and prevention measures as well as the burden of costs for sampling and testing causes increasing financial headaches for producers. The EU and Member States must finally ensure that the burden of cost is put on the shoulders of the producers who cause these problems. This means the companies who place GMOs on the market are solely responsible. Furthermore the precautionary principle must be adhered to by the European Commission when conducting a risk analysis of any new GMO authorisation.

If our EU and national leaders really want the sustainable development of farming in Europe and quality food production, if they want to preserve biodiversity and cultural heritage, they must provide EU citizens with a policy framework that protects organic and other GMO-free farmers and food producers from GMO contamination!

Legislation on the marketing of seed and planting material

Organic farming relies on the availability of a broad range of plant genetics to respond to consumer demand and to different geographic conditions. With Europe facing growing environmental challenges such as resource depletion and climate change it is essential these plant genetic resources are preserved and developed in use. It must be possible to market new varieties and populations adapted to low input and local conditions. As EU legislation on the marketing of seed and planting material restricts market access to registered plant varieties and sets strict criteria for registration and certification of plant reproductive material, it contributes to market concentration in seed companies and loss of genetic diversity in crops. Legislation therefore needs to be adapted to support farmers' rights and facilitate the conservation and further development of genetic resources and the diversity of crops (IFOAM EU Group, 2013).

Gebhard Rossmanith, Bingenheimer Saatgut AG, Germany

The future of organic farming depends on the availability of adapted varieties which are in line with the organic principles and the independence of our seed supplies. The ongoing trend in conventional breeding and farming towards even more uniformity and the use of high-tech-hybrids must be confronted face on by the organic sector through activities that promote the breeding of adapted varieties and keep crop genetic diversity alive.

EU legislation on the marketing of seed and planting material must not put disproportionate burden on organic breeders or farmers who use and preserve traditional varieties. We need a legislative framework that guarantees fair market access of organically bred natural varieties and finally recognises the importance of increasing the availability of a broad diversity of crop varieties for farmers and gardeners.

Encourage young people to start organic farming

Europe's farming population is aging rapidly. In 2007, for every farmer under the age of 35 in the EU, there were nine farmers over 55. From 1975 to 2007, total farm numbers for Belgium, Denmark, Germany, Ireland, France, Italy, Luxembourg, the Netherlands and the UK fell by more than 2.6 million, which works out at an average loss of 83 000 farms per year. Of these, almost 1.8 million were in Italy and France alone. (European Commission, 2012).

Generational renewal is critical for the development of economically viable rural areas and the preservation of diverse cultural landscapes, and for high quality food production, biodiversity and food cultures. Younger farmers also need access to land. As no EU-wide framework can provide an all-in-one solution, a coordinated mix of policy measures is needed, which takes into account the CAP and other EU policies and encourages young people to take-up farming. This should include a common understanding between Member States of land use policy.

Lieve Vercauteren, Bioforum Vlaanderen, Belgium

Tackling demographic and structural change is a major challenge for farming and rural areas today and depends on young people who dare take up organic farming or start other small businesses in rural areas. To encourage young people to farm as profession, Member states need to provide information on farming as a profession for students, whilst offering appropriate training and advice for conversion to organic farming as well as management of an organic farm and marketing

We need to stop the loss of farmland through urban sprawl, transport infrastructure and land intensive industries. This can also mean regulating land markets and land property and setting limits on land concentration. The fact that large, intensive, specialised farms often have greater financial means to buy or rent land in some countries causes significant problems for smaller mixed farms and family farms, this also concerns many organic farms. Fair access to farm land is needed.

It's time to discuss priorities for land use through a democratic process with civil society that confronts issues such as food production versus agro-fuels

Empower consumers to make informed food choices

Food choices are influenced by many factors, from cultural backgrounds to the availability of information supporting the transparency of production process. The EU legislation on food information to consumers,[14] for instance, helps to provide consumers with detailed information about ingredients. The organic logo is a success story based on a certification scheme that considers a broad range of sustainability aspects. The introduction of different labels and logos is now also being discussed at EU level. Examples include an animal welfare label, a logo for local products and the extension of the eco-label for food.[15]

Cecile Lepers, SYNABIO, France

Sustainability, animal welfare, nutritional and health aspects are increasingly important for consumers making their food purchasing choices. The EU must set clear rules to facilitate these choices. Overloading consumers with irrelevant, unreliable or confusing information must be avoided with consistent labelling rules, and the credibility of labels ensured.

The EU organic farming logo has been established as an EU flagship label for sustainability in the food chain. The label gives the EU the possibility to promote a comprehensive farming system that is delivering numerous aspects of sustainability. Continuous efforts must be made to ensure the credibility and quality of the label, as well as to raise awareness of the label amongst consumers. An additional eco-label for food would confuse consumers and is therefore unnecessary.

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3 Refers to final agreement, reached by the EU Institutions in June/September 2013, concerning the Regulations on direct payments, rural development, the single common market organisation and financing, management and monitoring as part of the CAP post-2013. More information at: www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/agricult/138923.pdf

4 The Commission's legal proposals for the CAP after 2013 were published in October 2011, following a public debate on CAP launched in April 2010. More information available at: ec.europa.eu/agriculture/cap-post-2013/legal-proposals/

5 Up to 20 % of the premium payments for the organic commitments, 30 % in the case of groups of organic farmers who undertake commitments

6 Established in April 2013 EIP-AGRI Service acts as a mediator within the EIP Network and seeks to enhance communication and cooperation between innovation stakeholders at EU, national and regional level.

7 The CSF replaces the EU Strategic Guidelines for Rural Development 2007-2013

8 Member States with direct payments below the EU average have the option to shift an additional 10 % of the rural development budget back to Pillar 1

9 For Pillar 2 Member States must notify the European Commission of changes by the 31 December 2013, 1 August 2014 and 01 August 2017 for the years 2014, 2015-2019, and 2018-2020 respectively. For Pillar 1 the options to adjust the percentage apply to the years 2015, 2016-2020and 2019-2020

10 The Commission is expected to submit its proposal for a new Regulation to the European Parliament and the Council in March 2014.

11 More information on the future EU organic action plan is available at: www.ifoam-eu.org/sites/default/files/page/files/ifoameu_reg_organicactionplan_input_20131126.pdf

12 Core Organic is a consortium of 24 partners from 20 countries. It is the only transnational funding structure dealing 100 % with organic research. The most recent call has been launched in December 2013. More information available at: www.coreorganic2.org. ERA-Net SUSFOOD consists of 25 partners from 16 countries. It deals with sustainability of the food chain beyond the farm gate. The first SUSFOOD call was launched in February 2013 with a second SUSFOOD call expected in February 2014. More information available at: www.susfood-era.net. The Joint Programming Initiative on Agriculture, Food Security and Climate Change (FACCE –JPI) , brings together 34 partners from 21 countries. More information available at: www.faccejpi.com

13 These activities are excluded from the scope of Regulation (EC) No 852/2004 (general food hygiene) and of Regulation (EC) No 853/2004 (hygiene of products of animal origin). Member States are obliged to adopt national rules, general provisions of Regulation (EC) No 178/2002 and Regulation (EC) No 882/2004 also apply.

14 Refers to Regulation (EC) 1169/2011 on the provision of food information to consumers

15 Currently an EU Eco-label logo is given to non-food products or services that are deemed to be environmentally friendly.

ORGANIC FARMING POLICY IN ACTION

02 RURAL DEVELOPMENT PROGRAMMES AND ORGANIC FARMING IN ITALY

Gianluigi Cardone and Patrizia Pugliese[1]

INTRODUCTION

Italy is a leading country in the European Union's (EU) organic farming sector. In 2011, it accounted for 12 % of the total area under organic cultivation in the EU (Eurostat, 2013), second only to Spain. In 2012, the full amount was 1 167 362 hectares, a 6.4 % increase on the previous year (SINAB, 2013). The main crops are forage, cereals, and olive trees. Permanent pasture and grazing areas are also important land use categories. For further information on organic farming and markets in Italy see chapter 5 and 6 in this volume.

Policy support for organic farming in Italy is based on EU, national and regional instruments designed to encourage the spread of organic farming throughout the country, and secure the provision of public goods in terms of environmental protection, animal welfare and rural development. The aim is also to satisfy the increasing demand for organic products among national and international consumers.

ORGANIC AGRICULTURE SUPPORT UNDER RDPs 2007-2013

In recent decades, rural development programmes (RDPs), under the Common Agricultural Policy (CAP), have been the most important instrument for fostering organic farming in Italy's regions. Indeed, the expansion of organically farmed land and growth in organic operator numbers eased off when there was a temporary halt payments in agri-environment measures, between the last two programming periods.

After the publication of Regulation (EC) No 1698/2005 concerning support for rural development between 2007-2013, Italy developed its own National Strategic Plan. In line with this plan, every region has elaborated its own rural development programme (National Rural Network, 2013) with which to establish local policies that respect the heterogeneity of the various regional and local territorial contexts.

Linked to Italy's national strategy, the regional RDPs for 2007-2013 view organic production methods as instrumental for environmental protection and the preservation of natural areas, and as beneficial for the health of consumers and farmers. Actions in support of organic agriculture also support efforts to achieve the objectives for *improving the environment and the countryside* (RDP - Axis 2). These include the reduction of greenhouse gas emissions and water and soil pollution due to agricultural inputs, the mitigation of climate change and the improvement of air quality, with special attention being paid to areas at high environmental risk.

Substantiating the above claim, all regions have now implemented the action supporting organic agriculture as part of RDP measure 214 - agri-environment - for the 2007-2013 period. More resources were allocated to organic agriculture than to the other practices addressed under measure 214. In line with the EU strategic guidelines for rural development 2007-2013 and the National Development Plan, and based on experience gained from the previous programming periods, it was necessary to consolidate and extend support for organic production methods. Such methods promote a global and systemic approach to the sustainable management and use of resources, while enabling long-term processes of farm innovation and development, with respect to individual and specific agri-environmental actions.

Payments made to organic operators differ, depending on the crops they grow on the surfaces eligible for payments (Cardone *et al.*, 2010). They are calculated using a cost-benefit analysis to evaluate gross margin losses resulting from the conversion of conventional areas to organic.

Most regions distinguish between an organic payments for areas undergoing conversion, and payments for areas that have completed their conversion period, with conversion payments being higher than maintenance payments.

This is intended to stimulate the conversion to organic farming. By contrast, a few regions opted instead to make the same basic payment for all areas, the aim of which is to discourage farmers from quitting the certification system at the end of a programming period and rejoining it later to secure the higher conversion payments.

Payments for the same crops may vary between the different regions due to the heterogeneity of the soil and climatic conditions, as well as the differences in cultural techniques and prices of inputs, labour and outputs. In their classification of rural areas (e.g. zoning), some regions exclude places that are affected by detrimental environmental factors (e.g. urban centres and rural areas with a preponderance of intensive agriculture) from payments for organic agriculture. Some policymakers, however, believe that organic agriculture should be specially developed in these areas to counteract their excessive impact on the environment and on the management of natural resources. In all the regions, the principle applies that farms must undergo conversion in their entirety, although exemptions are possible in some localised situations.

The supply of organic products grown in Italy, such as cereals, potatoes, rice, extra-virgin olive oil, pulses, lemons, etc, does not meet the domestic demand. Processors and traders therefore buy on the international market (Callieris *et al.,* 2010). Many conventional farmers in Italy are still reluctant to proceed with organic conversion due to economic uncertainty and the bureaucracy that the change entails. Many organic farmers produce to access payments, but do not sell their products with organic certification. Organic payments do not take into account the cost of certification, which is covered under a different measure. This results in an additional bureaucratic burden for beneficiaries.

Most regions prioritise the expansion of organic farming in order to increase the positive environmental impact of the action, in compliance with the RDP objectives. However, only a few regions provide incentives to their producers to sell on the organic market. Some regions apply penalties to producers who do not sell their products as organic, and others use a payment system that prioritises farmers who sell goods with the organic logo, or who have on-farm points of sale. On the other hand other regions prefer not to compel recipients of organic payments to market their products, in order to avoid problems for beneficiaries who are unable to provide such evidence. Measure 214 includes other schemes intended to achieve environmental objectives such as increased biodiversity and improved soil quality. In some regions, organic payments are not combined with other agri-environment schemes through so called on-top measures. Various regions grant additional payments to promote other activities that either benefit sensitive and/or protected areas (e.g. territorially integrated projects and/or production clusters), or link beneficiaries along the supply chain (e.g. integrated projects). Interactions between farmers (e.g. associations) are intended to promote synergies among operators, enhance the positive impacts on the environment, and concentrate the supply of products through common agreements with processors and/or traders.

RDPs also take into account other important territorial factors such as farm location, areas of environmental interest, including protected areas and the Natura 2000 network, water protection zones, nitrate vulnerable zones and pesticide vulnerable zones. The beneficiaries of payments are usually younger farmers, who are viewed as a priority in many regions. Some regions exclude producers who have already retired.

CAP REFORM 2014-2020: POLICY SUPPORT INSTRUMENTS FOR ORGANIC AGRICULTURE

The new CAP 2014-2020 will strengthen the central role of organic agriculture in the fight against climate change, the protection of the environment and the preservation of biodiversity. For further information about opportunities available under the CAP reform post-2013, see Chapter 1 in this volume.

In Pillar 1, direct payments, those who are already farming organically will automatically qualify for a greening payment as they are seen to be *ipso facto* greening compliant since they are already undertaking agricultural practices that address climate change and environmental objectives. Greening requirements such as the diversification of annual crops or maintaining permanent grassland, vineyard, olive groves and fruit orchards, are already undertaken by organic farmers which go beyond the scope of the new greening component (De Filippis and Sandali, 2013). Pillar 2, rural development, has a strong focus on organic agriculture, ranging from agri-environment payments to new measures especially for organic farming, as distinct from agri-climate-environment measures, which include other sustainability interventions. However in Italy supplementary payments are not scheduled for organic farmers who farm in ways that bring additional agri-environmental benefits.

The organic farming measure may also face competition from other agri-environment-climate schemes concerning integrated pest management and other related environment-friendly practice) under the minimum spending requirement for the environment in Pillar 2. This is because all farmers will not have to comply with the Sustainable Use of Pesticides Directive 2009/128/EC from 2014 in order to receive CAP payments and can continue to be supported under Pillar 2.

The new CAP reform has been widely discussed within the Italian organic and environmental movement. In forthcoming RDPs, these stakeholders are calling for an increase in the budget share allocated to Pillar 2 environment measures from 30 % to 50 %, the transfer of 15 % of Pillar 1 funds to Pillar 2 and the creation of a specific thematic sub-programme for organic supply chains and market development (Greenreport, 2013a, Greenreport, 2013b). They also want Italian authorities to set a target for organic farming in Italy to reach 20% of the total agricultural land by 2020.

NATIONAL POLICIES BEYOND THE CAP

Italy has contributed to the development of organic agriculture through its National Strategic Plan, regional RDPs, the National Action Plan on organic agriculture and organic products, and through specific research programmes in the field of organic farming. The Italian Ministry for Agriculture, Food and Forestry Policies (MiPAAF) has established an *ad hoc* office to coordinate activities, as well as an advisory committee and a working group for organic agriculture. The advisory committee brings together institutions and operators to exchange experiences, in order to promote and enhance organic production. The working group provides technical and scientific advice to the Ministry for its regulations, support policies and guidelines (INEA, 2012).

The National Action Plan 2005 on organic agriculture (MiPAAF, 2005) identified 7 strategy objectives.

- Strengthen the role of Italy in international markets and in global policies for the development of organic agriculture
- Strengthen, enhance and develop production and supply chains
- Develop organic animal husbandry
- Increase domestic consumptions
- Implement environmental and public health policies through organic agriculture
- Improve the environmental sustainability of organic holdings
- Introduce organic principles and techniques in non-productive sectors in order to reduce their impact on the environment, quality of life and public health

The National Action Plan includes 22 actions, grouped into the following 4 axes.

- Global market penetration
- Supply chain and market organisation
- Increased demand in the domestic market
- Strengthening and improving the institutional system and services

To implement this plan, MiPAAF has introduced a range of programmes, such as *Programma di azione nazionale per l'agricoltura biologica e i prodotti biologici* (MiPAAF, 2008), which operates along the following axes applying different actions for example:

- Axis 1 - Global market penetration - Creating and strengthening international networks (Action 1.2)
- Axis 2 - Supply chain and market organisation - Supporting intersectoral organisation (Action 2.3) and Initiatives supporting producer organisations (Action 2.4)
- Axis 3 - Increasing domestic demand and institutional communication - Promotion of organic agriculture in catering (Action 3.1) and Promotion of organic agriculture for the citizen-consumer (action 3.2)

CONCLUSION

The CAP reaffirms the central and instrumental role of organic agriculture in environment protection, climate change resilience, and the conservation of biodiversity. Unfortunately organic agriculture continues to face competition from other allegedly sustainable practices under the new CAP post-2013. To ensure the better use of the limited financial resources, attention must be paid to the coherent integration of all funds at community and national level.

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ENDNOTE

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03 POLICY SUPPORT FOR ORGANIC AGRICULTURE IN EU CANDIDATE AND POTENTIAL CANDIDATE COUNTRIES

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INTRODUCTION

Candidate[2] and Potential candidate[3] (CPC) countries are relative newcomers to organic agriculture when compared to EU Member States. Organic agriculture took off in the 1980s with the involvement of key actors such as private companies, NGOs, governments and international donors.

The organic land area has steadily increased in the last five years (see Figure 3.1), although data collection systems in the CPC countries remain fragmentary and less developed, and provide patchy information. Indeed, the decline in the total organic area in 2008, following on from high values registered in 2006 and 2007, was mainly due to the reassessment and revision of data related to wild collections in Serbia, Montenegro and the former Yugoslav Republic of Macedonia (FYROM).

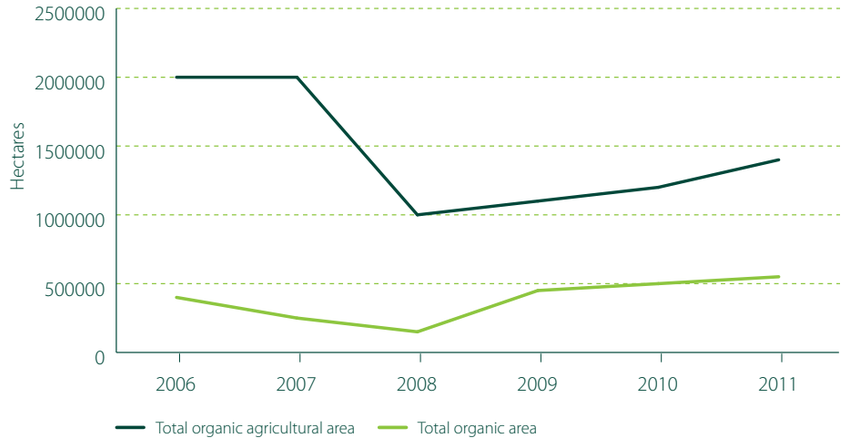

Figure 3.1: Total organic agricultural and total certified organic areas in CPC countries, 2006-2011

Source: MOAN, 2012.

In 2011, 45 589 operators were involved in organic agriculture in CPC countries, based on a total certified organic area of almost 1.25 million hectares. This amounted to 23 % of the total organic area in the Mediterranean region. The area available for organic wild collection was 741 146 hectares, while the agricultural area accounted for 502 879 hectares (see Table 3.1). The country with the largest cultivated organic agricultural area (442 582 hectares) was Turkey, while Bosnia and Herzegovina ranked first in terms of wild collection area (220 000 hectares).

Table 3.1: Organic statistics for the CPC countries, 2011

Country	Cultivated organic agricultural area (ha)	Total certified organic area[a] (ha)	Organic operators
Albania[b]	4 536	6 686	131
Bosnia and Herzegovina[b]	580	220 580	27
Former Yugoslav Republic of Macedonia (FYROM)	45 998	253 148	780
Montenegro	2 946	142 755	97
Serbia	6 237	6 237	323
Turkey	442 582	614 619	44 231
Total	**502 879**	**1 244 025**	**45 589**

[a] Area including wild collections, forests and non-agricultural grazing
[b] Data for 2010

Source: Mediterranean Organic Agriculture Network (MOAN), 2012

The national regulatory and institutional frameworks of these countries have shown considerable, though inconsistent, development over the past twenty years. The interest of the governments in organic agriculture, and their interventions in the field have always been preceded by pioneering NGO initiatives and export projects (Al-Bitar and Pugliese, 2008).

EU accession is a key driver for CPC countries in their continued investments in market consolidation, institution building and the harmonisation of laws and regulations, and in updating their statistics. However, the administrative fragmentation, the limited research, extension and human capital development, the market vulnerability and the limited financial resources all constitute a substantial challenge for these countries to overcome (Vittuari, 2011).

This article is intended to provide a brief update on the existing policy frameworks in those CPC countries that are members of the Mediterranean Organic Agriculture Network (MOAN)[4], while highlighting the levels of governmental engagement and the existing gaps in these frameworks.

EXISTING SUPPORT MEASURES FOR THE ORGANIC SECTOR IN CPC COUNTRIES

On the basis of the information collected we can observe a common and general trend of engagement in organic agriculture on the part of the CPC governments. A national organic regulation is in force in almost all CPC countries, which have also set up legislative frameworks. The exception is Bosnia and Herzegovina (see Table 3.2), where the absence of a national organic regulation is a consequence of institutional fragmentation: in the Republic of Srpska the existing law in is not harmonised with the EC No 834/2007, while in the Federation of Bosnia and Herzegovina (FBiH), the law is stuck in the parliamentary processes.

With the exception of Albania and FBiH, central offices and/or units have been established at the Ministries of Agriculture to deal with organic issues, though these are often understaffed and in need of capacity development to perform their multiple tasks effectively.

The design, implementation and assessment of financial support measures for the organic sector are developing, despite having only recently become established. The fact that they are new explains the modest impact they have made on the sector's growth in some cases. This is compounded by poor promotion and lack of transparency, as pointed out by targeted beneficiaries. The most widespread forms of support available for production are the coverage of a share of the certification costs, and area payments (or per-head payments for livestock and beehives). Other instruments, such as investment grants and reduced credit rates, are much less common.

Table 3.2: Policy support framework for organic agriculture in CPC countries, 2013

EU Candidate and Potential candidate countries (CPC)		State regulation, central office & interaction with the sector				Support for production & supply chain organisation				Support for market development		Pro-organic initiatives in public support structures			National Action Plan / strategic document [j]
		National regulation [a]	Central office [b]	Data collection [c]	Advisory/Consultative body [d]	Certification costs [e]	Area payment [f]	Investment grants	Other [g]	National logo [h]	Promotion [i]	Education	Extension	Research	
Albania		●	○	●	◖	●		●			●	●	●		●
BiH	FBiH		○	○							●				
	RS	◖	●	○		●	●			○					
FYROM		●	●	●	●	●	●		●	●	●	◖	●		●
Montenegro		●	●	●			●	●	●	●	●				●
Serbia		●	●	●		●	●			●	●	●		●	●
Turkey		●	●	●	●	●	●		●	●	●	●	●	●	●

a National regulation: ● fully implemented ◖ partially implemented ○ in draft
b Central office: ● established ministerial unit ○ Ministerial unit not established but ministerial personnel deals with organic agriculture issues.
c Data collection: ● officially conducted ○ no official data collection
d Consultative body: ● consultative body formed of representatives from the public and private sectors officially established and functioning ◖ established but not fully performing its tasks yet.
e In Montenegro and Turkey certification costs are covered for export products only.
f In Serbia, Montenegro and Turkey, per-head payments are also provided for livestock raising.
g In FYROM support for laboratory analyses is also provided and in Turkey organic farmers can benefit from loans at reduced interest rates.
h National logo: ● created and in use ○ in draft
i Promotion: This mainly includes participation in national and international fairs and events, production of promotional and educational materials, information and educational campaigns.
j National Action Plan: ● developed and formalised.

Various international cooperation initiatives, mainly implemented by foreign NGOs, have contributed to the establishment of locally based control and certification bodies (CCBs). In countries such as Albania and Bosnia and Herzegovina, where a national regulation has not yet been implemented or is substantially irrelevant (due, among other things, to the absence of a local market), domestic CCBs have built up lasting links with their foreign supporters. While the domestic CCBs operate closely with the public authorities and are integrated into the national policy frameworks, there is only marginal interaction between public authorities and foreign certification bodies, which have no local offices and almost exclusively serve export markets in CPC countries.

In CPC countries, EU Organic Regulations have always provided the main point of reference for national legislation and the certification of local and foreign CCBs. There are two reasons for this: firstly, the prospect of their pending EU accession, and secondly the fact that the EU is the main target market for exports. All the EU Candidate countries have already started the process of harmonising their national laws on organic production, in compliance with Regulation (EC) No 834/2007. Serbia and FYROM are particularly well advanced in the process.

Labelling regulations also reflect the state of the legislative framework. They are important for consumer clarity and transparency and they provide an explicit signal regarding the political commitment to the organic sector; they are also needed for compliance with EU integration requirements. The situation varies between the EU Candidate countries, where a national logo exists and is used, and the Potential candidate countries, which have no national logo and where the local certification bodies use their own (e.g. Albinspekt in Albania and Organska Kontrola in Bosnia & Herzegovina).

Governmental and local promotional efforts mainly include support for participation in local and international fairs. In some cases (FYROM and Turkey), support is also given for the production of educational and information materials. Financial support for organic measures is mostly drawn from the national budgets for agricultural development. In some countries a number of noteworthy pro-organic initiatives also exist within the public support structures, whereas in the field of education and research, less support is available for extension services. Short and long courses in organic farming are now organised by private and public colleges and universities, mainly in FYROM, Serbia and Turkey. In some cases, training has been provided to extension workers, for example in Turkey. However, significant investment is still necessary for the capacity development and strengthening of public extension services if they are all to meet the needs of organic producers.

As far as sector strategies are concerned, the situation varies considerably from country to country. In Albania a national strategy exists but it has only been implemented to a limited extent. In Turkey and Montenegro the existing national action plans for organic agriculture development are being implemented efficiently. Meanwhile, FYROM and Serbia are each preparing a second action plan, which should be ready by early 2014. In these cases, the plans are helping to secure a significant position for organic agriculture in the overall planning of agricultural development, mainly with specifically targeted financial measures (Vittuari, 2011).

CONCLUSION

The positive trend in organic farming in Italy needs to be consolidated against a backdrop of widespread awareness for more sustainable means of production, where the profitability of the farming system should also take into account environmental, social and health costs (Nemes, 2013; Znaor, 2013). Also significant is the shift in emphasis of the CAP towards the redistribution of resources in favour of rural development, with an eye to supporting small-scale family farms.

Stakeholder involvement in policy development is becoming broadly accepted, and policy-makers are increasingly aware of the need to fine-tune public actions to accommodate the capacities of all the stakeholders involved (public institutions, organic associations, market operators). Moreover, in places where organic agriculture is still at an early stage, international cooperation agencies operating in the field should be actively involved in the policymaking process. In CPC countries which have no unified and well-organised organic movements, there is still a lack of platforms for such dialogues and exchanges.

In the short and medium term, the inclusion of organic farming schemes in EU-funded rural development programmes represents a promising opportunity for CPC countries, but it also raises big challenges, especially in countries where the interaction between the different agriculture and rural development stakeholders is still relatively poor.

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2 EU Candidate countries refer to Montenegro, Serbia, the former Yugoslav Republic of Macedonia (FYROM) and Turkey.

3 Potential candidate countries refer to Albania and Bosnia and Herzegovina (BiH) with its two entities, the Federation of Bosnia and Herzegovina (FBiH) and Republic of Srpska (RS).

4 The Mediterranean Organic Agriculture Network (MOAN) is an institutional Network that seeks to bring together the Ministries of Agriculture of 24 Euro-Mediterranean countries: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Italy, Jordan, Lebanon, Libya, Former Yugoslav Republic of Macedonia (FYROM), Malta, Montenegro, Morocco, Palestinian Authority, Portugal, Serbia, Slovenia, Spain, Syria, Tunisia and Turkey. Membershipembership of Cyprus and Greece has not yet been finalised. It is a tool for decision makers to exchange information and good practices related to organic agriculture, to share common strategies for its further development in the Mediterranean area and to valorise its potential and identity in the global debate.

04 ORGANIC ACTION PLANS: MAINSTREAMING ORGANIC FARMING IN PUBLIC POLICY

Jürn Sanders[1] and Otto Schmid[2]

INTRODUCTION

Organic farming is supported in Europe[3] in different ways. Most countries have implemented specific area payments for organic farming through agri-environmental schemes to finance their contribution to environmental protection and the provision of other public goods. In the European Union these measures are typically financed through national or regional rural development programmes (RDPs) that are co-funded by the EU and Member State administrations. These payments are an important foundation for the financial performance of organic farms, since they compensate them for additional costs or income foregone due to their organic commitments. Besides payments, a wide range of other public policy instruments exist, such as financial support for processing and marketing organic products, investment aids, a range of training, advice and information policies, as well as research support for projects related to organic farming (Sanders *et al.*, 2011).

A MULTI-DIMENSIONAL POLICY APPROACH

In several countries, different organic support measures are combined and coordinated within an organic action plan. Typically, organic action plans are based on a detailed analysis of the strengths and weaknesses of the organic sector. They comprise a balanced mix of different supply-oriented policy measures (such as area payments, information for farmers, etc.) and demand-oriented policy measures (such as marketing aids, consumer information campaigns, etc.) tailored to local conditions. Other typical characteristics of organic action plans are (Schmid *et al.*, 2008; Stolze and Lampkin, 2009):

- participation of stakeholders and involvement of relevant government departments in the action plan development process and during implementation period
- explicit statements about the strategic role of organic farming in general agricultural policy
- analyses of the status quo and identification of conflicting and supportive policy areas
- formulation of clear strategic goals and growth targets in terms of land area or market share

The action plan mechanism is particularly useful, because efforts to develop the organic sector seek to address and enforce the growth capacity of the entire sector. One-sided support for farmers could have a negative impact on the market if there is a large imbalance between supply and demand of organic products. On the other hand, fostering only the demand for organic products does nothing to ensure the regional adoption of organic farming practices. Furthermore, an action plan may also address the challenge that the development of the organic sector usually depends on more than just economic factors. Other factors that need to be considered for an effective growth strategy are, for example, farmers' attitudes towards organic farming or access to information on organic production techniques.

It is worth noting in this context that different development stages require a different set of measures and a different design of the organic action plan, because the contribution of single policy measures varies depending on the size of the sector and/or the stage of the sector development. Area payments, for example, play a very important role in initiating the development of the supply side. They can dynamically influence the development of the organic sector at an early stage. In countries with developed organic sectors, organic area support is still important, but it is mostly not enough, on its own, to persuade a large number of conventional farmers to enter into organic production, thereby stimulating significant further growth of the supply side. Market signals and confidence in future market opportunities are also important factors. This underlines the importance of regularly evaluating and revising organic action plans, in order to adjust the policy framework to the respective stages of the sector's development and accommodate new external drivers such as a reform of the CAP, as these can have a direct effect on EU Members States. Thus, the action plan approach does not involve just a single step, but should be considered as a continuous process. For further information about opportunities presented by the CAP reform, see Chapter 1 in this volume.

ORGANIC ACTION PLANS DIFFER SUBSTANTIALLY ACROSS EUROPE

In the last 15 years, most countries in Europe have launched an organic action plan or a similar support programme. In some countries, an organic action plan existed only for a certain period of time (e.g. England), while others have continuously updated their action plans (e.g. Austria). There are some Member States with an on-going action plan (e.g. Germany) and others where an action plan was formulated but never implemented (e.g. Portugal). In 2013, there were 24 national organic action plans being implemented in Europe as well as regional action plans in Belgium, Spain and the UK (see Figure 4.1). Beside their frequency and duration, the action plans also differ in their nature and in the types of action they promote, which reflects the different support strategies and developmental stages of the organic sectors in Europe. Some action plans are less focused on individual support measures, but are rather a strategic policy document which provides an enabling framework for further actions. This was the case, for example, in Sweden. The action plan, implemented for the period 2007-2010, was general in nature and described strategies which could foster the development of organic farming. The involvement of the Swedish government was primarily to monitor and evaluate the implementation of the action plan by other stakeholders. Other action plans are much more detailed and include a list of specific actions. For example, the Irish Organic Action Plan proposes a large number of specific actions; it defines the roles of the institutions involved and sets a time frame for each action.

There are also substantial differences with regard to the financial endowment of the action plans. In many cases, no specific budget has been allocated to the organic action plans. Financial resources are made available by the actors involved in the action plan, or the plans are financed under other existing programmes (e.g. in the Czech Republic or Austria). In contrast to this, the German government has allocated a specific budget for its Federal Organic Farming Scheme, which is used to finance research and information measures. This scheme has recently been opened up to include other forms of sustainable agriculture, which means it is not an organic action plan in the true sense.

Table 4.1: Overview of organic action plans being implemented in European countries in 2013

Country / Region		Running period	Number of previous actions plans	Year of implementation of the first action plan	Quantitative targets		Target year
					Share of organic for total agricultural area	Share of organic food in the total food market[a]	
AL	Albania	2006 - 2013	0	2007	2 %[o]	-	-
AT	Austria	2011 - 2013	4	2001	20 %	-	2013
BE	Flanders	2013 - 2017	3	2000	-	-	-
	Wallonia	2013 - 2020	0	2013	14 %	-	2020
BG	Bulgaria	2007 - 2013	0	2007	8 %		2013
HR	Croatia	2011 - 2016	0	2011	8 %	-	2016
CZ	Czech Republic	2011 - 2015	1	2004	15 %	3 %[b]	-
DK	Denmark	2012 - 2020	2	1995	ca. 15 %[c]	-	2020
EE	Estonia	2007 - 2013	0	2007	ca. 3 %[d]	3 %[e]	2013
FI	Finland	2013 - 2020	1	2013	20 %	-	2020
MK	FYROM	2013 - 2020	1	2013	4 %	-	-
FR	France	2013 - 2017	2	2008	ca. 8 %	-	2012
DE	Germany	since 2002	0	2002	-[g]	-	-[g]
IE	Ireland	2013 - 2015	1	2008	5 %	-	2020
IT	Italy	-	1	2005	-	-	-
LV	Latvia	2007 - 2013	1	2007	10 %	-	2013
LU	Luxembourg	2009 - 2013	0	2009	ca. 5 %[h]	-	-
ME	Montenegro	2012 - 2017	0	2012	-	-	2017
NL	Netherlands	-	2	2001	-	-	-
NO	Norway	2009 - 2020	0	2009	15 %	15 %	2020
PL	Poland	2011 - 2014	1	2007	ca. 4 %[i]	-	2013[j]
RO	Romania	-	1	2004	-	-	-
SK	Slovakia	2011 - 2013	1	2006	5 %	-	-
SI	Slovenia	2005 - 2015	1	2007	20 %	10 %[k]	2015
ES[l]	Spain	-	1	2007	-	-	-
SE	Sweden	-	1	1996	20 %[m]	-	2014
TR	Turkey	2013 - 2016	0	2013	-	-	-
UK[n]	Scotland	since 2011	0	2007	-	-	-

[a] Related to the annual turnover
[b] CZ: 60 % of organic food sales are to be organic products produced in the Czech Republic.
[c] DK: Doubling the area under organic management
[d] EE: 120 000 ha organically managed area
[e] EE: Share of organic food produced in Estonia in the total food market
[f] FR: Doubling the area under organic management
[g] DE: No targets were set out in the Federal Organic Farming Scheme. But as part of its national sustainability strategy, Germany aims to achieve a share of 20 % in the long-run
[h] LU: Doubling the area under organic management in 2006
[i] PL: Annual growth of 5 % in the organically managed area
[j] PL: 600 000 ha organically managed area; target and target year of the previous action plan
[k] SI: Share of organic food produced in Slovenia in the total foood market
[l] ES: Regional action plans were also implemented in Andalucía, Asturias, Castilla-La Mancha, Cataluña, Extremadura and País Vasco
[m] SE: Objective of a government communication on organic production and consumption in 2006
[n] UK: In England and Wales, earlier regional organic action plans were phased out in 2007 and 2010, respectively
[o] AL: The total share of organic agriculture, including wild collections, is approximately 5%.

Source: Own presentation based on information supplied by national experts, FiBL and IAMB data for 2013 and country reports see Chapter 6 from this volume.

EFFECTIVENESS OF ORGANIC ACTION PLANS

The great diversity of the organic action plans in Europe indicates that implementing such a plan is not always the same as pursuing a comprehensive and coherent strategy to foster organic farming. A strong and coherent support strategy exists wherever a comprehensive package of policies provides the basis for balanced support that addresses the specific development needs of the organic sector. Furthermore, an effective policy framework requires strong links between organic farming and the wider policy goals, allowing the organic action plan to be embedded in the national agricultural policy. This is the case in Denmark, for example, where the government wants to effect a green transition of the country's agriculture, and it views organic production as a cornerstone in this conversion. The new action plan, introduced in 2012, includes various initiatives across the supply chain and provides new stimulus for growth in the sector, with the target of doubling the organically farmed area by 2020. This would be a substantial increase on the period 2000 to 2012, during which time the organic area expanded from 157 676 hectares to 182 930 hectares (+16 %), and the share of organic land in the total agricultural area increased only slightly, from 6.0 % to 6.9 %.

The consequences of a lack of a coherent support strategy can be illustrated, for example, with the case of Germany. The organic farming scheme has provided sustained financial support to improve the basic conditions for the expansion of organic farming through research and the provision of information on organic farming to all supply chain actors. However, this support is not linked to the agricultural policies of the German federal states, which are responsible for the RDPs, including organic area payments. Furthermore, this scheme, like other organic support strategies in Germany, does not adequately allow for the effects of the country's support programme for renewable energies. As a result of the latter programme, the production of energy crops, such as maize, has become financially very attractive to farmers. Consequently, fewer farmers are converting to organic farming and some have even reverted to conventional agriculture (Kuhnert *et al.*, 2013). Despite this, the organic farming sector has experienced continuous growth in Germany. Between 2002, when the scheme was introduced, and 2012, the organic area in Germany increased by nearly 50 % and the market for organic products more than doubled. The share of organically farmed land in the total agricultural area increased from 4.1 % to 6.2 %. There is some evidence to suggest that the organic farming scheme did contribute to this growth, but due to the complex interrelationships with other measures it is not possible to determine clearly the extent of its influence (Ekert *et al.*, 2012).

It is not only the provision of support for organic farming that matters, so too does its reliability and the farmers' confidence in the future prospects of the sector. This is because the decision to start an organic business usually requires producers and processors to make financial investments and take risks. Obviously, the willingness to take such risks is higher if there is confidence in the market, and this turn is influenced by a reliably supportive climate for organic agriculture on the government side (i.e. the government is effectively a risk-sharing partner). A reliably supportive climate can be established by a succession of action plans. In Austria, for example, four action plans of varying duration have been implemented consecutively between 2001 and 2013. Each of these included a clear development target, an assessment of the current situation and a number of measures in response to that situation. When the first action plan came into force, 14 % of the utilised agricultural area – or UAA – was already managed organically. By 2012, the share of organic land in the total agricultural area had risen to 19.7 %. Thus, Austria was able to provide the right conditions for the expansion of an already well-established organic sector.

In the EU, in addition to national and regional organic action plans, there is also an action plan at EU level. Introduced by the European Commission in 2004, the European Action Plan for Organic Food and Farming (EOAP) contains 21 action points, most of which relate to the work of revising and implementing the EU's Organic Regulations. Other points address the consumers' need for information and promotion campaigns, the needs for improved research, market intelligence and statistical data collection, and the utilisation of rural development measures. Since the nature of organic farming support is defined at the national and regional levels, the potential impact of the European Organic Action Plan is limited. A further weakness is that it gives no consideration to the interaction of organic farming with the main elements of the CAP, in particular the national and regional RDPs. Because the EOAP mainly addresses areas of regulation, it is understandable that Member States have not paid it much attention when planning their RDPs in general, and organic support policy in particular.

CONCLUSION

While it is essential to highlight the important role of organic action plans, it should be stressed that it is impossible to identify clearly the specific effects of such integrated policy programmes. This is because organic sector development is not the result of a single policy. It is the combination of public support and external factors that plays a significant role in shaping the organic sector.

When designing organic action plans, it is necessary to recognise the high interdependency that exists between individual public support measures. Their interaction seems to be decisive for the development of the organic sector. Furthermore, it is important to remember that it is not only the organic farming policies that matter, but that policies from other areas can influence the effectiveness of organic farming support measures. For this reason it is important that the organic action plan is embedded in the national agricultural policy.

At EU level, experiences with the EU Organic Action Plan 2004 have shown that such a support programme should address all the areas of EU policy that could have an impact on the development of the Union's organic sector. Besides the regulatory policies, this includes the framework of financial support policies (Pillars 1 and 2 of the CAP), as well as research programmes and promotional activities. Moreover, it is important that an EU Organic Action Plan also involves national or regional policy actors, and that it facilitates a common understanding of organic sector development principles in Europe.

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3 For the purposes of this article organic action plans in the EU-28, EU Candidate and Potential candidate countries (CPC), European Free Trade Association (EFTA) countries are outlined with a special emphasis on organic action plans in the EU Member States. CPC countries refers to EU Candidate countries Montenegro, Serbia, the Former Yugoslav Republic of Macedonia (FYROM) and Turkey and, Potential candidates - Albania, Bosnia and Herzegovina, Kosovo. More information available at: www.europa.eu/about-eu/countries.

ORGANIC FARMING AND MARKET DEVELOPMENT IN EUROPE

05

GROWTH TRENDS IN EUROPEAN ORGANIC FOOD AND AGRICULTURE

Helga Willer[1], Diana Schaack[2], and Marie Reine Bteich[3]

INTRODUCTION

In Europe today, organic agricultural land, operators[4] and markets[5], in almost all countries, continue to develop and grow. Furthermore in a global context Europe continues to be a forerunner in organic agriculture.[6]

This positive development in Europe and in particular in the European Union (EU) is due to a number of reasons, including strong consumer demand, legal protection and requirements for organic production and labelling as set out in EU and national legislation, and the development of private organic standards. In addition, policy support measures, such as conversion and maintenance payments for organic production and other relevant measures, provided for in most countries under the Common Agricultural Policy (CAP), Rural Development Programmes (RDPs) and support for research and advice, contribute to sectoral development. More coordinated policy approaches have also been promoted through national organic action plans which seek to link support measures with further development and growth. The organic sector also benefits from strong organisations, represented by International Federation of Organic Agriculture Movements (IFOAM) EU Group, which plays an important role in the development of organic food and farming in Europe.

This chapter summarises the key figures on organic farming and market development in Europe, the 28 Member States of the EU (EU-28), the EU Candidate and Potential candidate (CPC) countries[7], and the members of the European Free Trade Agreement (EFTA).[8] For the purposes of this report, the data for the organic sector in the EU-28 will be analysed from the perspective of two country groups, the EU-15[9] who were Member States of the EU before 2004 and the EU-13[10] who became Member States after 2004, as these two groups show different development trends. Data for the organic sector in non-EU Member States are presented from the perspective of countries that are members of EFTA or are prospective CPC countries.

Looking at the European organic sector by country group, it becomes evident that in the **EU-15** both organic agricultural land and the organic market have shown constant growth in the past ten years. Production is diversified, and domestic demand can be met to a large degree, even though imports play an important role for many countries. Overall the market is well developed, with a full range of products available. In a global context, the EU-28 and in particular the EU-15 countries, are leaders in terms of organic share of total agriculture and the overall market. The per capita consumption of organic products is also higher than in other parts of the world. Much of the market development has been driven by strong consumer interest, a well-developed organic sector with strong institutions, state support and through organic action plans.

After their accession to the EU many of the **EU-13** countries saw their organically farmed areas increase very fast, driven by support under the EU's RDPs. However, the market did not develop in the same way. Even though the share of organic land compared to total farmland is high, production, market shares, and per capita consumption remain low in some countries. The inadequate development of processing facilities means that local demand for processed products often cannot be met, and many processed products are imported. However, recent high growth rates in countries like Croatia, Poland, and Slovenia show that the market is beginning to develop fast. Like in the EU-15, many EU-13 countries have an organic action plan.

Similarly to the EU-13, the **EU Candidate countries** have experienced rapid growth in organic agricultural land over the past couple of years. However, domestic and export-led market development, as well non-agricultural activities such as processing, have not kept pace. The main exception is Turkey, which has witnessed a fast and steady development of production; much of this is for export, as well as the local market in recent years.

Data collection on organic farming for the **Potential candidates** is not well developed, but from the data available it seems that there has not been much growth since 2004. Nevertheless, while organic farming is at the very early stages of development in these countries, wild collections (e.g. fruit and mushrooms) are a prominent part of the total organic area.

In the **EFTA** countries, the development of organic land has not been as fast as in the other country groups since 2004. Nevertheless, Switzerland and Liechtenstein have very high shares of organic agricultural land, and have a strong organic sector, a good consumer base, and state support which have made it possible for the sector to become an established part of society.

Key indicators 2012

- **Organic agricultural land is** now at 10 million hectares in the EU-28. In Europe 1as a whole, 11.2 million, hectares are organic.

- The **share of agricultural land** managed organically represented 5.6 % of the total agricultural land of the EU-28. In a global context, the EU-28 has a high share of organic farmland. In 5 of the EU-28 countries (7 countries in Europe), 10 % or more of the agricultural land was organic.

- **Growth of organic agricultural land** has been substantial in Europe and in the EU-28 over the last decade, where the organic area has almost doubled since 2004. Organic farmland in the EU-15 has increased by 52 %, and it trebled in the EU-13. In the CPC countries high growth was noted, particularly for Turkey, whereas for EFTA growth was modest.

- **Land use data** shows a strong production base with permanent grassland and crop land representing almost equal shares of the organic farmland.

- Approximately one fifth of **organic land is in conversion**; therefore an increase of supply of organic products may be expected in the near future. The proportion of land under conversion is even higher in the EU-13 (31%) and in the CPC countries (55 %).

- **Producer** numbers have also grown significantly (more than 250 000 in the EU-28; 320 000 in Europe), and again growth rates in the new Member States have been considerably higher since 2004 than in the EU-15.

- A large proportion of **processors and importers** are located in the EU-15, showing that the EU-13 still needs to develop its processing capacities in order to become less dependent on organic imports and increase the value of its own products for export.

- Valued at EUR 20.8 billion in 2012, the EU-28 is the **second biggest single market** for organic products in the world after the United States. The European market has continued to grow during the financial crisis, showing a growth rate of approximately 6 % for 2012, representing a value of EUR 22.7 billion.

- Together with Switzerland, the EU-28 are among the top ranking countries for **market shares and per capita consumption** worldwide. Three countries have an organic market share of more than 5 % and 5 countries have a per-capita consumption of more than EUR 100. Individual products and product groups achieve even higher shares.

- Almost no data is available on **exports and imports**, but it may be assumed that, with the growing domestic markets, international trade activities will increase, both for inter-EU trade as well as exports and imports to and from the EU.

Table 5.1: Key indicators for the organic sector, 2012

Indicator	Europe	EU-28	EU-15	EU-13	CPC	EFTA	World (2011)[11]
Organic agricultural land (million ha)	11.15	9.98	7.64	2.34	0.56	0.19	37.2
Share of total agricultural land	2.3 %	5.6 %	5.9 %	4.7 %	1.6 %	4.3 %	0.8 %
Producers*	322 000	253 000	191 000	62 000	59 000	9 000	1 798 000
Retail sales (billon EUR)	22.7	20.8	20.4	0.5	0.04	1.7	47.8

Source: OrganicDataNetwork survey 2013 based on national data sources, FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources.
*Figures rounded off.

ORGANIC AGRICULTURAL LAND

In 2012, 11.2 million hectares were farmed organically in Europe and almost 10 million hectares in the EU-28, 7.6 million hectares of which were in the EU-15 and 2.3 million hectares in the EU-13 (see Table 5.1).

In the EU-15 the countries with the largest areas of organic land were in Spain, Italy, Germany, and France. In the EU-13 the largest areas were in Poland, the Czech Republic and Romania (see Figure 5.1 and Figure 5.2).

In the CPC countries 0.56 million hectares were organic (most of this area being in Turkey), and in the EFTA countries 0.19 million hectares were organic, more than half of this area being in Switzerland.

In the EU-28, CPC and the EFTA countries, 10.7 million hectares were farmed organically in 2012 (see Table 5.1).

Globally, 37.2 million hectares of farmland were organic in 2011 (Willer *et al.*, 2013). 29 % of the world's organic farmland was in Europe. Among the 10 countries with the largest organic areas (led by Australia with 12 million hectares) were 4 EU Member States (Spain, Italy Germany, and France).

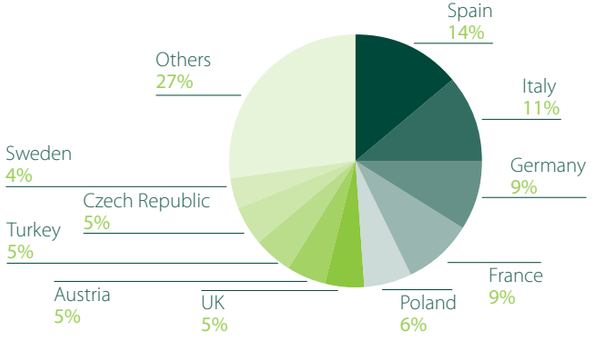

Figure 5.1: Distribution of organic agricultural in Europe, 2012 (11.2 million hectares)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

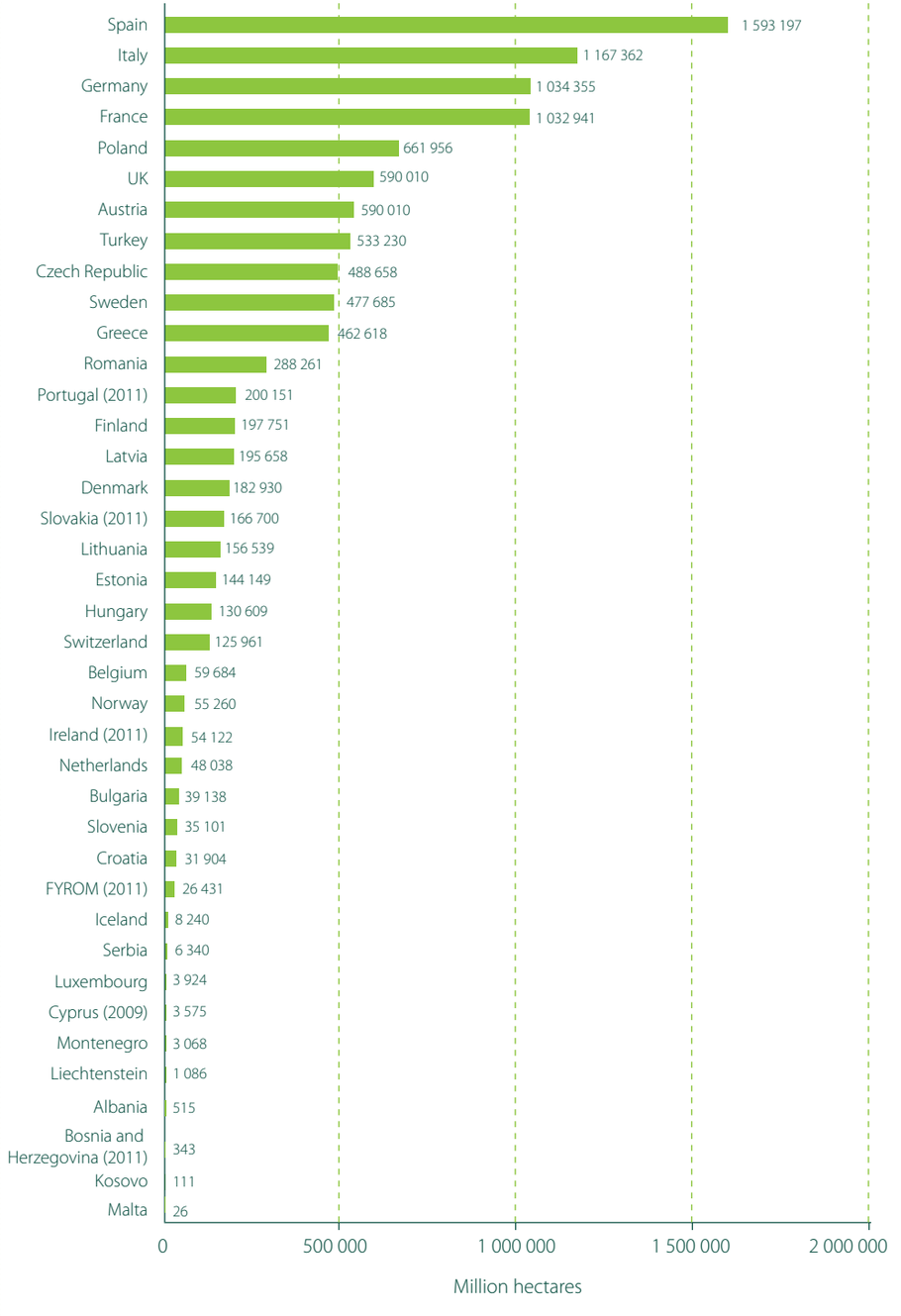

Figure 5.2: Total organic agricultural land by country, 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

Shares of organic agricultural land

In the EU-28, the 9.98 million hectares of organic farmland in 2012 constituted 5.6 % of the total agricultural land (see Table 5.2).

In 5 countries more than 10 % of the agricultural land was organic. The countries with the highest shares are Austria, Sweden, and Estonia. One of the goals of the Austrian Organic Action Plan was to achieve a 20 % share for organic land, which it achieved in 2010. The country had an organic share of 19.7 % in 2012.

In the EU-15, 5.9 % of the agricultural land was organic, a higher share than in the EU-13 (4.7 %). In the EU-13, Estonia, the Czech Republic and Latvia have more than 10 % organic land. Despite high organic shares of the agricultural land, in some EU-13 countries organic production remains low due to the high proportion of grassland and the lack of processing facilities.

In the CPC countries, total shares of organic agricultural land are still low, whereas two EFTA countries, Switzerland (12 %) and Liechtenstein (29.6 %), have very high shares for the European and global context.

In Europe 2.3 % of the agricultural land was organic in 2012.
Seven countries had more than 10 % organic agricultural land. The country with the highest share in Europe (and the second highest in the world) was Liechtenstein (see Figure 5.3).

Globally, 0.8 % of the agricultural land was organic in 2011. The country with the highest share was the Falkland Islands with 35.9 %, followed by a number of European countries. In ten countries, globally, more than 10 % of the farmland was organic. However, 64 % of the countries had less than 1 % organic land (Willer *et al.*, 2013).

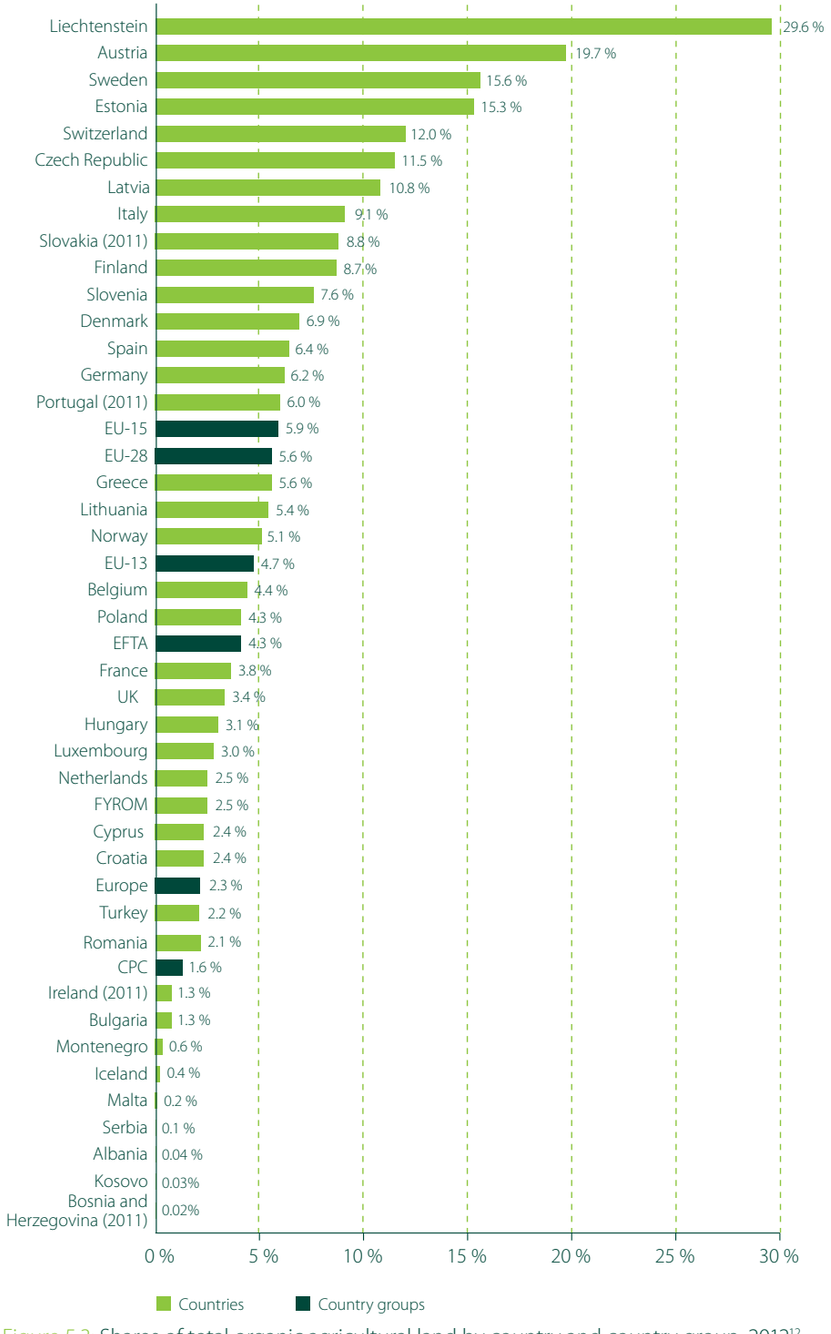

Figure 5.3: Shares of total organic agricultural land by country and country group, 2012[12]

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

Growth of the organic land

Since 2004, when 10 new Member States joined the EU, organic agricultural land has increased by 72 % in the EU (Europe: 76 %) – up from 5.8 million hectares in 2004 to 10 million hectares in 2012 (see Figure 5.4).

In the EU-15, growth was slower (+52 %) than in the EU-13, which almost trebled in area.

In the CPC countries, high growth (+400 %) was noted, most of this in Turkey, whereas in the EFTA countries growth was modest.

Since 2004 the organic farmland area in the EU-28, the CPC and EFTA countries has increased by 76 %.

Globally, since 2004, the area of organic farmland increased by 26 % from 29.4 to 37.2 million hectares in 2011, this is a considerably slower growth rate than in Europe (Willer *et al.*, 2013).

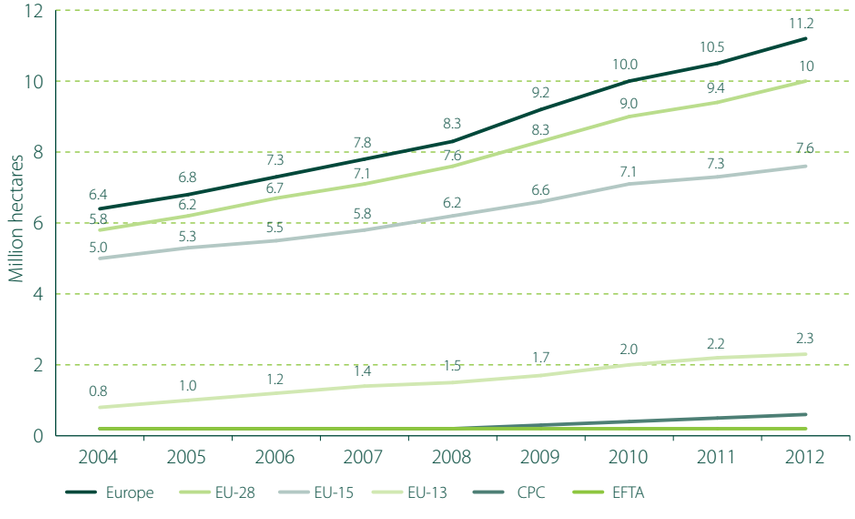

Figure 5.4: Growth of organic agricultural land, 2004-2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

Table 5.2: Organic agricultural land and share of total agricultural land, 2012; change for 2004-2012; and 2011-2012

Country group	Country	Organic agricultural land (ha)	Share of total agricultural land	Change 2004-2012	Change 2011-2012
Europe		**11 152 150**	**2.3 %**	**+76 %**	**+6 %**
EU-28		**9 981 173**	**5.6 %**	**+72 %**	**+5.4 %**
EU-15	Austria	533 230	19.7 %	+16 %	-1.7 %
	Belgium	59 684	4.4 %	+152 %	+7.9 %
	Denmark	182 930	6.9 %	+5 %	0.0 %
	Finland	197 751	8.7 %	+22 %	+5.1 %
	France	1 032 941	3.8 %	+94 %	+6.0 %
	Germany	1 034 355	6.2 %	+35 %	+1.8 %
	Greece	462 618	5.6 %	+86 %	+116.9 %
	Ireland (2011)	54 122	1.3 %	+76 %	
	Italy	1 167 362	9.1 %	+23 %	+6.4 %
	Luxembourg	3 924	3.0 %	+24 %	+5.5 %
	Netherlands	48 038	2.5 %	0 %	+1.8 %
	Portugal (2011)	201 054	6.0 %	+18 %	
	Spain	1 593 197	6.4 %	+187 %	-1.8 %
	Sweden	477 685	15.6 %	+115 %	-0.5 %
	UK	590 009	3.4 %	-15 %	-7.6 %
Total		**7 638 997**	**5.9 %**	**+52 %**	**+4.3 %**
EU-13	Bulgaria	39 138	1.3 %	+3 415 %	+56.4 %
	Croatia	31 904	2.4 %	+1 024 %	-0.4 %
	Cyprus (2009)	3 575	2.4 %	+260%	
	Czech Republic	488 658	11.5 %	+86%	+6.1 %
	Estonia	144 149	15.3 %	+213 %	+7.8 %
	Hungary	130 609	3.1 %	-1%	+5.0 %
	Latvia	195 658	10.8 %	+346 %	+6.3 %
	Lithuania	156 539	5.4 %	+326 %	+2.8 %
	Malta	23	0.2 %	+76 %	
	Poland	661 956	4.3 %	+700 %	+8.6 %
	Romania	288 261	2.1 %	+293 %	+25.4 %
	Slovakia (2011)	166 700	8.8 %	+226 %	
	Slovenia	35 101	7.6 %	+52 %	+9.2 %
Total		**2 342 274**	**4.7 %**	**+209 %**	**+8.7 %**
CPC	Albania	515	0.04 %		+15 %
	Bosnia and Herzegovina	343	0.02 %		+900 %
	FYROM (2011)	26 431	2.5 %	+13 633 %	
	Kosovo	111	0.03 %		
	Montenegro (2011)	3 068	0.6 %		
	Serbia	6 340	0.2 %		+1.6 %
	Turkey	523 627	2.2 %	+382 %	18.3 %
Total		**560 435**	**1.6 %**	**+409%**	**+17.0 %**
EFTA	Iceland	8 240	0.4 %	-16 %	-0.1 %
	Liechtenstein	1 086	29.6 %	+10 %	-0.8 %
	Norway	55 260	5.1 %	+35 %	-0.4 %
	Switzerland	125 961	12.0 %	+10 %	+2.4 %
Total		190 547	4.3 %	+15 %	+1.5 %

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

ORGANIC LAND USE AND CROPS

Land use

Land use and crop details are available for all countries in the EU-28, the CPC and EFTA countries. In this respect, these countries differ substantially from other parts of the world, for which such data is often not supplied.

In 2012, in the EU-28, 3.9 million hectares were used for arable crops (38.9 % of the agricultural land), and 4.7 million hectares were used as grassland (47.2 %). Almost one million hectares were used to grow permanent crops (10 %) (see Table 5.3).

In 2012, in Europe, 4.6 million hectares were used for arable crops (41.7 % of the agricultural land), 4.9 million hectares for grassland (44.2 %), and 1.1 million hectares to grow permanent crops (9.8 %) (see Table 5.3).

Table 5.3: Organic agricultural land by land use type, 2012

Land use (ha)	Europe	EU-28	EU-15	EU-13	CPC	EFTA
Arable crops	4 648 029	3 876 798	2 908 584	968 214	408 408	66 119
Permanent crops	1 096 038	997 347	892 034	105 314	88 771	1 481
Permanent grassland	4 925 911	4 694 681	3 500 557	1 194 123	49 869	110 040
Total[13]	**11 152 150**	**9 980 271**	**7 637 997**	**2 342 274**	**560 435**	**190 547**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

The area for all land use types has grown steadily since 2004. The largest increase was for permanent crops, which more than doubled (+139 %).

By country, the largest permanent grassland or grazing areas were in Spain, followed by Germany, and the UK. The largest crop land areas (i.e. arable and permanent crops together) were in Italy, Spain and France (see Figure 5.5).

Comparing the EU-13 and EU-15, it becomes evident that the proportion of grassland is higher in the new Member States (51%). The importance of arable crops is about the same, whereas permanent crops have a higher share in the EU-15, mainly because of large areas of olives and grapes in the EU-15 Mediterranean countries (see Table 5.3).

In summary, it can be said that organic agriculture and processing in the EU-15 produces a wide range of products according to the demand of the markets. Organic production in the new Member States has filled many gaps for the EU-15, where production volumes of raw materials are insufficient. Due to the lack of processing facilities in the EU-13, there is a demand for processed items, which are commonly imported from the EU-15. All European countries depend on imports of tropical crops like bananas, coffee, sugar and other products that cannot be grown in Europe.

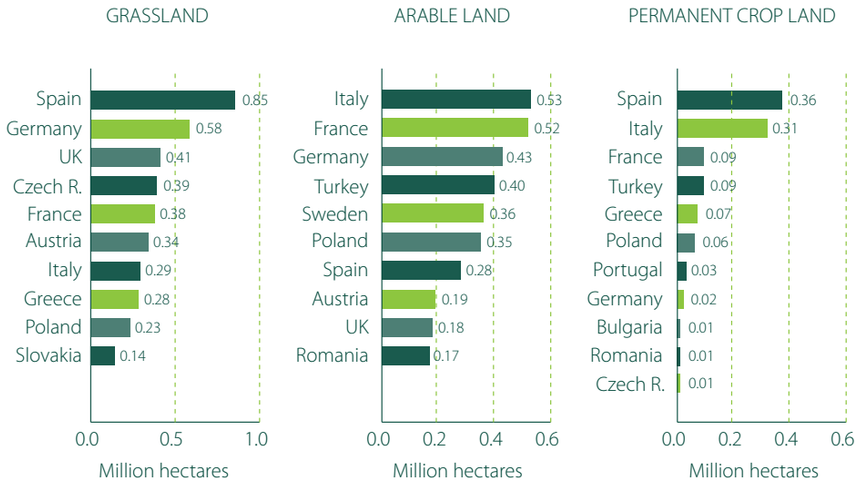

Figure 5.5: Top 10 countries with the largest organic areas by land use type, 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

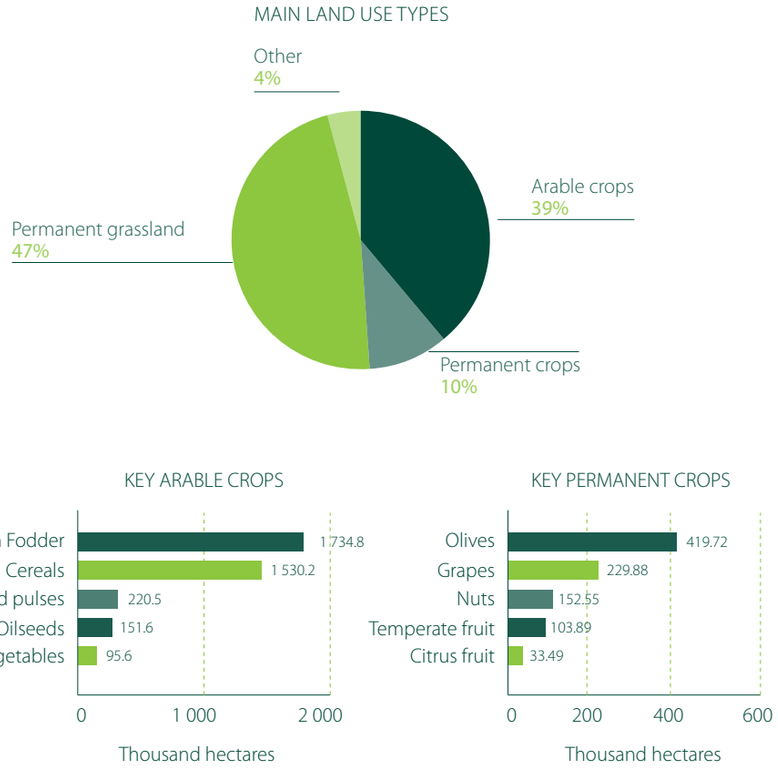

Figure 5.6: Organic agricultural land use in the EU-28, 2012

OrganicDataNetwork survey 2013, based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

ARABLE CROPS

In the EU-28, 3.9 million hectares were categorised as arable land in 2012. Of this, 75 % is in the EU-15. The countries with the largest arable crop areas are Italy, France, and Germany (see Figure 5.5). The key arable crop group is green fodder from arable land (1.5 million hectares, followed by cereals (1.4 million hectares). The largest cereal areas are in Italy, Germany, and Spain (see Table 5.5). Organic vegetables were grown on 99 500 hectares in 2012; key producing countries were Italy, France, and the UK. From 2004 to 2012, of the arable crops, the largest growth was noted for green fodder from arable land (+200 %), followed by oilseeds (+108 %) and cereals (+96 %) (see Figure 5.7).

PERMANENT CROPS

In the EU-28, 10 % of the agricultural land was used to grow permanent crops (1 million hectares). Almost 90 % of the permanent crop land is in the EU-15. The countries with the largest areas of permanent cropland are Spain, Italy, and France (see Figure 5.5). A large part of the permanent cropland is used for olives, grapes, and nuts. Whereas for most permanent crops the EU-15 countries have the largest areas, the EU-13 countries have considerable areas of temperate fruit (e.g. apples in Poland) and berries in the Baltic countries). High growth rates from 2004 to 2012 were achieved particularly for nuts (+233 %), grapes (+219 %), and temperate fruit (+170 %) (see Figure 7.5).

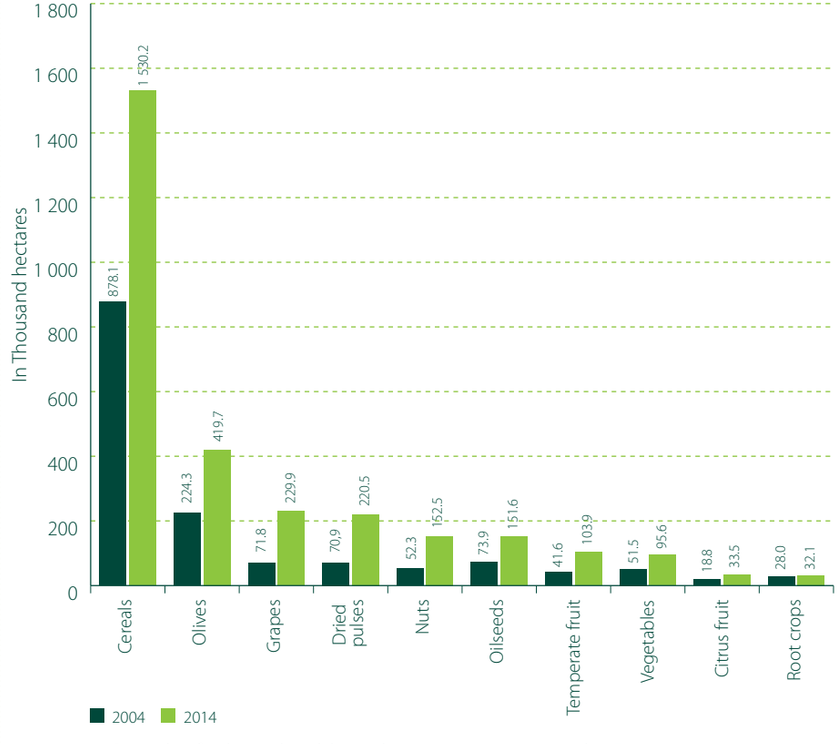

Figure 5.7: Growth of selected arable and permanent crops in the EU-28, 2004-2012

OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2006-2013, based on Eurostat and national data sources. Figure excludes areas for temporary grasslands/green fodder from arable land.

Table 5.4: Top 10 arable and permanent crop groups by country group area, 2011; 2012; change 2011-2012

Crop group	Country group	2011 Area (ha)	2012 Area (ha)	Change 2011-2012
Cereals	Europe	1 780 059	1 889 173	6 %
	EU-28	1 404 063	1 530 203	9 %
	EU-15	1 034 933	1 096 444	6 %
	EU-13	369 130	433 759	18 %
	CPC	222 827	204 115	-8 %
	EFTA	13 910	15 596	12 %
Olives	Europe	418 006	456 184	9 %
	EU-28	386 068	419 724	9 %
	EU-15	384 414	417 729	9 %
	EU-13	1 654	1 996	21 %
	CPC	31 937	36 460	14 %
Dried pulses and protein crops	Europe	233 299	245 273	5 %
	EU 28	211 576	220 491	4 %
	EU-15	171 787	175 749	2 %
	EU-13	39 789	44 743	12 %
	CPC	6 605	9 408	42 %
	EFTA	360	614	71 %
Grapes	Europe	231 212	241 614	4 %
	EU-28	217 156	229 880	6 %
	EU-15	211 464	222 718	5 %
	EU-13	5 693	7 162	26 %
	CPC	8 956	6 634	-26 %
	EFTA	370	374	1 %
Oilseeds	Europe	190 487	192 829	1 %
	EU-28	149 374	151 595	1 %
	EU-15	78 222	77 711	-1 %
	EU-13	71 152	73 885	4 %
	CPC	2 004	2 274	13 %
	EFTA	535	385	-28 %
Nuts	Europe	185 014	172 517	-7 %
	EU-28	164 856	152 549	-7 %
	EU-15	136 616	141 097	3 %
	EU-13	28 239	11 452	-59 %
	CPC	19 897	19 708	1 %
Temperate fruit	Europe	114 107	119 631	5 %
	EU-28	98 750	103 887	5 %
	EU-15	46 332	43 617	-6 %
	EU-13	52 418	60 270	15 %
	CPC	12 979	13 302	2%
	EFTA	666	730	10 %
Vegetables	Europe	109 390	105 123	-4 %
	EU-28	99 518	95 566	-4 %
	EU-15	86 566	80 017	-8 %
	EU-13	12 952	15 549	20 %
	CPC	2 362	2 201	-7 %
	EFTA	1 818	1 776	-2 %
Root crops	Europe	43 932	44 736	2 %
	EU-28	32 286	32 077	-1 %
	EU-15	25 818	25 511	-1 %
	EU-13	6 468	6 566	2 %
	CPC	3 434	4 492	31 %
	EFTA	741	696	-6 %
Citrus fruit	Europe	30 505	34 186	12 %
	EU-28	29 990	33 493	12 %
	EU-15	29 928	33 435	12 %
	EU-13	63	58	-8 %
	CPC	515	693	35 %

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2006-2013, based on Eurostat and national data sources, compiled by FiBL

Table excludes permanent grassland and areas for temporary grasslands/green fodder from arable land.
For detailed data sources see data sources at the end of this chapter.

Table 5.5: Top 5 arable and permanent crop groups by country area, 2004; 2011; and 2012

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
Albania	Olives	55	166	198	259 %	19 %
	Fruit			123		
	Medicinal and aromatic plants			90		
	Medicinal and aromatic plants, permanent		88	85		-3 %
Austria	Cereals	64 699	93 115	97 178	50 %	4 %
	Oilseeds	4 608	15 886	14 586	217 %	-8 %
	Dried pulses and protein crops	11 244	12 474	12 459	11 %	0
	Root crops	2 162	4 546	4 332	100 %	-5 %
	Grapes	1 657	4 178	4 259	157 %	2 %
Belgium	Cereals	2 397	4 816		101 %	
	Dried pulses and protein crops	118	1 284		988 %	
	Vegetables	430	744		73 %	
	Temperate fruit	355	439		24 %	
Bosnia and Herzegovina	Cereals		45			
	Berries		23			
	Grapes		8			
	Root crops		6			
	Medicinal and aromatic plants		5			
Bulgaria	Cereals		6 521	7 532		16 %
	Nuts		3 034	5 981		97 %
	Medicinal and aromatic plants		2 348	3 378		44 %
	Oilseeds		2 587	3 292		27 %
	Temperate fruit		1 440	2 155		50 %
Croatia	Cereals	1 371	8 288	7 261	430 %	-12 %
	Oilseeds		3 093	2 074		-33 %
	Nuts		1 089	1 754		61 %
	Medicinal and aromatic plants		726	1 159		60 %
	Temperate fruit	54	875	940	1 641 %	7 %
Cyprus (2009)	Olives	414	946		129 %	
	Cereals	155	476		207 %	
	Grapes	75	204		170 %	
	Tropical and subtropical fruit	31	90		190 %	
	Temperate fruit		75			
Czech Republic	Cereals	13 535	24 382		80 %	
	Temperate fruit		5 684			
	Oilseeds	23	2 319		9984 %	
	Dried pulses and protein crops	463	1 845		298 %	
	Medicinal and aromatic plants		1 449			
Denmark	Cereals	50 561	44 650		-12 %	
	Dried pulses and protein crops	5 821	5 579		-4 %	
	Vegetables	963	2 064		114 %	
	Root crops	1 261	1 476		17 %	
	Oilseeds	1 415	585		-59 %	
Estonia	Cereals		20 493	23 626		15 %
	Oilseeds		2 091	3 064		47 %
	Dried pulses and protein crops		739	1 917		159 %
	Berries		909	1 055		16 %
	Temperate fruit		371	507		37 %
Finland	Cereals	53 247	39 143		-26 %	
	Dried pulses and protein crops	1 527	8 145		433 %	
	Oilseeds	2 989	2 921		-2 %	
	Berries	700	430		-39 %	
	Root crops	497	381		-23 %	

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
France	Cereals	89 027	119 747	133 195	50 %	11 %
	Grapes	16 428	61 055	64 801	294 %	6 %
	Dried pulses and protein crops	12 532	45 624	45 069	260 %	-1 %
	Oilseeds	18 845	26 705	27 098	44 %	1 %
	Vegetables	7 711	12 491	13 600	76 %	9 %
FYROM	Cereals	63	3 670		5694 %	
	Nuts	29	387		1222 %	
	Oilseeds	2	119		6750 %	
	Vegetables		75			
	Dried pulses and protein crops	16	53		229 %	
Germany	Cereals	174 500	204 000	202 000	*16 %*	-1 %
	Dried pulses and protein crops	18 100	25 500	22 200	23 %	-13 %
	Vegetables	8 400	11 300	10 574	26 %	-6 %
	Root crops	7 600	9 550	9 610	26 %	1 %
	Oilseeds	7 600	5 800	8 200	8 %	41 %
Greece	Olives	25 811	51 937	62 702	143 %	21 %
	Cereals	12 582	26 758	51 544	310 %	93 %
	Grapes	3 303	4 807	4 997	51 %	4 %
	Dried pulses and protein crops	192	3 724	3 727	1841 %	0 %
	Medicinal and aromatic plants		1,806	2,141		19 %
Hungary	Cereals	27 716	23 112	27 029	-2 %	17 %
	Oilseeds	7 700	7 438	8 467	10 %	14 %
	Dried pulses and protein crops	1 356	1 813	2 417	78 %	33 %
	Vegetables	1 189	1 770	1 818	53 %	3 %
	Temperate fruit		1 793	1 626		-9 %
	Nuts	363	1 440	1 503	314 %	4 %

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
Ireland (2011)	Vegetables	234	274		17 %	
	Cereals	797				
Italy	Cereals	191 312	184 111	210 543	10 %	14 %
	Olives	88 963	141 568	164 488	85 %	16 %
	Grapes	31 170	52 812	57 347	84 %	9 %
	Nuts	6 512	27 839	30 071	362 %	8 %
	Citrus fruit	15 043	21 940	25 340	68 %	15 %
Latvia	Cereals	7 982	26 257	30 771	286 %	17 %
	Dried pulses and protein crops	55	3 301	3 299	5 927 %	0 %
	Root crops	1 187	1 324	1 381	16 %	4 %
	Oilseeds		1 316	877		-33 %
	Temperate fruit		533	542		2 %
Liechten-stein	Cereals		71	62		-13 %
	Root crops		9	7		-19 %
	Vegetables		5	3		-46 %
	Grapes		2	2		0
	Temperate fruit		1	1		0
Lithuania	Cereals	13 888	54 320	66 923	382 %	23 %
	Dried pulses and protein crops	3 747	24 387	26 486	607 %	9 %
	Medicinal and aromatic plants		25 183	6 848		-73 %
	Oilseeds	153	2 321	5 513	3 503 %	138 %
	Berries		3 627	4 040		11 %
Luxem-bourg	Cereals	571	633		11 %	
	Fruit/nuts/ berries	43	87		103 %	
	Dried pulses and protein crops	87	74		-15 %	

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
	Seeds and seedlings	56	73		30 %	
	Vegetables	17	33		97 %	
Malta	Vegetables		7			
	Olives		5			
	Grapes	1	5		400 %	
	Root crops		2			
	Tropical and subtropical fruit		1			
Netherlands	Vegetables	4 776	4 939	4 931	3 %	0
	Cereals	4 252	4 367	4 075	-4 %	-7 %
	Root crops	5 724	1 467	1 456	-75 %	-1 %
	Temperate fruit		340	363		7 %
	Dried pulses and protein crops	16	78	83	419 %	6 %
Norway	Cereals	7 126	7 518	8 844	24 %	18 %
	Vegetables	301	230	218	-28 %	-5 %
	Temperate fruit		156	199		28 %
	Dried pulses and protein crops			161		
	Root crops		134	117		-12 %
Poland	Cereals		109 511	122 818		12 %
	Temperate fruit		36 792	41 990		14 %
	Berries	872	11 971	14 633	1578 %	22 %
	Vegetables	829	7 364	9 379	1031 %	27 %
	Dried pulses and protein crops		4 194	5 698		36 %
Portugal (2011)	Olives	19 019	18 345		-4 %	
	Nuts	5 235	4 177		- 20 %	
	Grapes	909	2 523		178 %	
	Fruit		6 471			
	Medicinal and aromatic plants		1 324			
Romania	Cereals	20 500	79 167	106 149	418 %	34 %
	Oilseeds	20 100	46 046	43 923	119 %	-5 %
	Temperate fruit		2 725	4 668		71 %

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
	Dried pulses and protein crops		3 147	2 764		-12 %
	Grapes		842	1 649		96 %
Serbia	Cereals		1 169	2 522		116 %
	Temperate fruit		1 138	1 416		24 %
	Vegetables		78	114		46 %
	Berries		20	28		40 %
Slovakia (2011)	Cereals	7 762	15 406		98 %	
	Oilseeds	1 031	2 533		146 %	
	Temperate fruit		758			
	Vegetables	447	722		62 %	
	Medicinal and aromatic plants		292			
Slovenia	Cereals	792	1 198	1 386	75 %	16 %
	Fruit/nuts/ berries	334	723	767	130 %	6 %
	Grapes	49	287	324	561 %	13 %
	Oilseeds	22	92	249	1032 %	171 %
	Olives	4	92	184	4500 %	100 %
Spain	Cereals		175 880	174 005		-1 %
	Olives	90 042	168 619	168 039	87 %	0
	Nuts	39 159	96 990	98 272	151 %	1 %
	Grapes	14 928	79 016	81 262	444 %	3 %
	Dried pulses and protein crops		36 090	45 195		25 %
Sweden	Cereals	59 597	84 851	86 538	45 %	2 %
	Dried pulses and protein crops	8 076	10 173	9 761	21 %	-4 %
	Oilseeds	2 027	2 747	3 395	67 %	24 %
	Vegetables	532	958	990	86 %	3 %
	Root crops	1 175	1 013	907	-23 %	-10 %

Country	Crop group	2004 Area (ha)	2011 Area (ha)	2012[14] Area (ha)	Change 2004-2012	Change 2011-2012
Switzerland	Cereals	4 382	6 321	6 690	53 %	6 %
	Vegetables	1 198	1 582	1 556	30 %	-2 %
	Root crops	618	599	572	-7 %	-4 %
	Temperate fruit	514	509	530	3 %	4 %
	Dried pulses and protein crop		360	453		26 %
Turkey	Cereals		217 941	197 877		-9 %
	Olives		31 771	36 262		14 %
	Nuts		19 390	19 320		0
	Temperate fruit	1 658	11 764	11 835	614 %	1 %
	Tropical and subtropical fruit		11 329	10 672		-6
UK	Cereals	44 289	52 862	48 123	9 %	-9 %
	Vegetables	5 089	13 527	10 645	109 %	-21 %
	Root crops	2 621	3 021	2 650	1 %	-12 %
	Temperate fruit		1 752	1 703		-3 %
	Dried pulses and protein crops	6 365	1 597	1 335	-79 %	-16 %

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2006-2013, based on Eurostat and national data sources, compiled by FiBL

Table excludes permanent grassland and areas for temporary grasslands/green fodder from arable land.
2012 data for all countries was not available. For more details on data sources see chapter endnotes.

Animal Husbandry

In many countries, organic animal husbandry began with beef, milk and sheep production. These products continue to have the highest organic shares within the sector. The conversion of more extensive grass-based cattle and sheep production is comparatively easy. Milk and dairy products are among the pioneer products on the organic market. Germany is the largest organic milk producing country, with 670 million kg in 2012, followed by Denmark (478 million kg), France (451 million kg) and Austria (418 million kg). All in all, 731 000 organic dairy cows were kept in the EU-28 in 2012, constituting 3.2 % of all dairy cows.

The conversion of farms with monogastric animals like pigs and poultry is far more complicated, due to the requirements for animal husbandry in the Regulation (EC) No 834/2007 and dependence on sometimes expensive forage crops. In 2012, farmers in the EU-28 kept 505 000 organic fattening pigs (average stock), which accounted for only 0.3 % of all fattening pigs in the EU-28. The largest production countries were Germany (127 000) and France (107 000).

15.3 million organic laying hens were kept in the EU-28 in 2012 (3 % of all laying hens). In some countries the shares were much higher as eggs are one of the success stories in the market. In Luxembourg, Austria, and Sweden more than 10 % of the laying hens were organic. The largest producers were France (3.36 million), Germany (3.30 million) and the Netherlands (2.12 million).

Conversion status of organic agricultural land

In the EU-28, of the 10 million hectares of organic agricultural land, 6.3 million hectares were fully converted, and 1.8 million were under conversion. Most but not all countries provided data on their fully converted and in-conversion area; however, no details are available for instance for Austria, Germany, Portugal and Switzerland.

Figure 9.5 shows that in France, Italy, Poland, Romania, Spain, and Turkey, large areas were under conversion, and therefore a major increase of supply may be expected from these countries in the near future.

By crop group, almost one million hectares of grassland (permanent and temporary as well as green fodder) were under conversion, as well as 400 000 hectares of cereals, 160 000 hectares of olives, 84 000 hectares of grapes, and 50 000 hectares of temperate fruit.

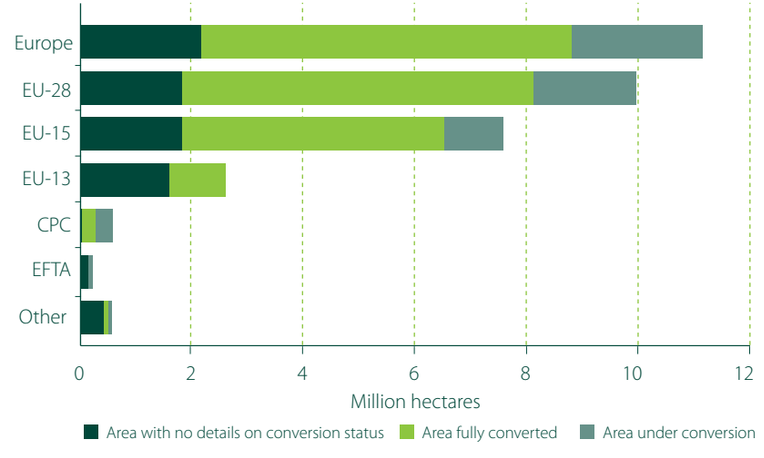

Figure 5.8: Total organic agricultural land - fully converted or in conversion - by country group, 2012

Source: OrganicDataNetwork survey 2013, based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

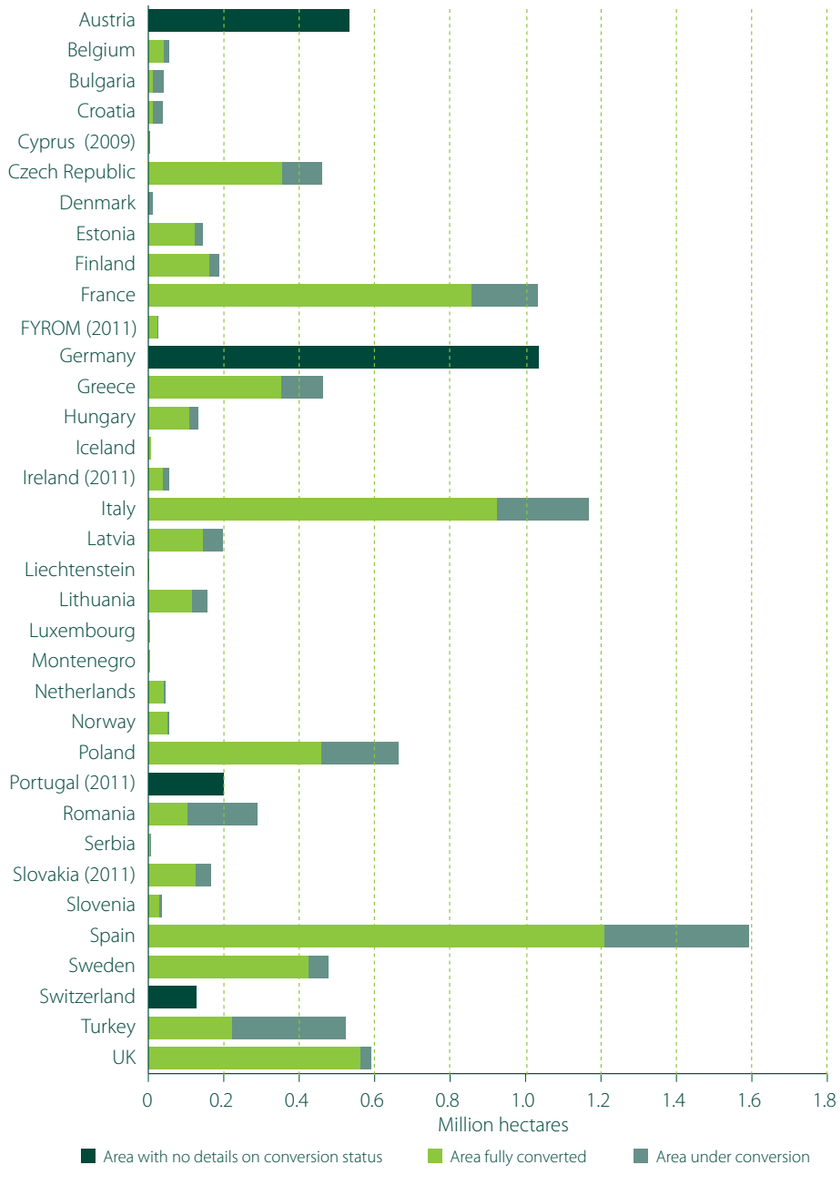

Figure 5.9: Total organic agricultural land - fully converted or in conversion - by country, 2012[15]

Source: OrganicDataNetwork survey 2013, based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources

PRODUCERS, PROCESSORS AND IMPORTERS

PRODUCERS

In the EU-28, there were more than 250 000 **producers** in 2012. The country with the largest number of producers was Italy (43 852), followed by Spain (30 462), Poland (25 944), and France (24 425). A large number of the organic producers were in the EU-15 (more than 190 000), and more than 62 000 producers were in the EU-13.

Since 2004, when 164 571 producers were counted, their number has almost doubled (EU-28: +77 %; EU-15: +47 %; EU-13: +366 %).

In Europe more than 320 000 producers were counted in 2012. The country with the largest number of producers in Europe was Turkey (57 259).

Globally, 1.8 million producers were counted in 2011. 16 % of these were in Europe (Willer *et al.*, 2013).

PROCESSORS

In the EU-28, the CPC and EFTA countries there were almost 40 000 **processors** in 2012. It should be noted, however, that countries that have a large organic market and well developed processing facilities, such as Austria and Switzerland, do not have data on the number of organic processors in their countries. According to available data, an overwhelming number of processors (almost 37 000) are in the EU-15. In the EU-13, there were only 1 900, and in the other European countries almost 700. These figures, though far less complete than the producer data, clearly show that the processing infrastructure in the EU-13, and also in many of the CPC countries, is not yet well developed.

IMPORTERS

In the EU-28, almost 1 500 **importers** were counted in 2012 (1 600 in Europe). Of the entities in the EU-28, 93 % were in the EU-15, showing the importance of imports in these countries, most of which have well developed markets. In the EU-13 as well as the CPC countries, the number of importers is still low (see Table 5.6).

Table 5.6: Organic producers, processors and importers by country, 2012

Country group	Country	Producers	Processors	Importers
Europe		**321 486**	**39 624**	**1 610**
EU-28		**253 392**	**38 798**	**1 453**
EU-15	**Austria**	21 843		
	Belgium	1 389	691 (2011)	121 (2011)
	Denmark (2011)	2 677	517	
	Finland	4 322	352	27
	France	24 425	8 957	137
	Germany	23 032	8 293	309
	Greece	23 433	1 551	4
	Ireland (2011)	1 400	204	31
	Italy	43 852	9 542	297
	Luxembourg	102	43	3
	Netherlands	1 646	1 035	
	Portugal (2011)	2 603		
	Spain	30 462	2 790	111
	Sweden	5 601	680	218
	UK	4 281	2 206	95
Total		**191 068**	**36 861**	**1 352**
EU-13	**Bulgaria**	2 754	81	1
	Croatia	1 528	57	36
	Cyprus (2009)	732	53	
	Czech Republic	3 934	454	9
	Estonia	1 478	64	
	Hungary	1 560	414	14
	Latvia	3 496	87	2
	Lithuania	2 527	91	
	Malta (2011)	9	1	1
	Poland	25 944	312	30
	Romania	15 315	105	3
	Slovakia (2011)	365	41	5
	Slovenia	2 682	177	
Total		**62 324**	**1 937**	**101**
CPC	**Albania**	46	22	4
	Bosnia and Herzegovina	25	12	
	FYROM (2011)	419	23	3
	Montenegro	62	1	
	Serbia	1 073	28	32
	Turkey	57 259	113	32
Total		**58 884**	**203**	**69**
EFTA	**Iceland**	35	25	
	Liechtenstein	35		
	Norway	2 590	541	60
	Switzerland	6 173		
Total		**8 833**	**566**	**60**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources. Operator definitions can vary i.e. some operator data represents producers who are also processors as well as other specialised operators. This sometimes results in inconsistent reporting and explains discrepancies.

DOMESTIC MARKET DEVELOPMENT AND INTERNATIONAL TRADE

Retail sales

In 2012, the organic market continued to grow in the EU-28 (see Figure 5.10), even though some countries were still affected by the economic crisis, leading to stagnation or even decline.

The organic market in the EU-28 increased by approximately 6 % in 2012. It now amounts to slightly more than EUR 20.8 billion (provisional data). Germany, the largest market, had a growth rate of 6 %. Some countries like Denmark, Ireland, and Sweden showed stagnation; others showed strong growth, such as: Finland (+24 %), Norway (+17.2 %), the Netherlands (+14.2 %, including catering and restaurants). In contrast, retail sales decreased for the fourth consecutive year in the UK (-1.5 %), but a return to growth was noted in 2013. In Greece, the market declined substantially in 2013 due to the economic crisis; however data is not available.

Germany, the largest market in Europe, had retail sales of EUR 7.04 billion, and France held second place with EUR 4.0 billion – a market that has shown very dynamic growth in the past couple of years. The UK was in third place (EUR 1.95 billion), followed by Italy (EUR 1.84 billion). As in recent years, the highest market shares were reached in Denmark (7.6 %), Austria (6.5 %), and Switzerland (6.3 %). The highest per capita consumption of organic food in 2012 was in

Switzerland (EUR 189), Denmark (EUR 159), Luxembourg (EUR 143), Austria (EUR 127, 2011), Sweden (EUR 95), and Germany (EUR 64). However, care must be taken in interpreting these figures as the costs of living differ quite considerably between countries (see Table 5.7).

In 2013, in many European countries the market experienced further significant growth, and growth rates were similar to those in 2012 (final figures are expected to be available by the beginning of 2014). Consumer interest in organic products remains high, even though they increasingly have to compete with other sustainability and regional labels. In spite of the difficult economic climate in some European ccountries where market shares are still low, consumer concern about the way food is produced is increasing.

The EU is the second largest organic market in the world after the United States. A comparison of the 2011 data for the whole of Europe (EU 21.5 billion in 2011) and North America (EUR 22.9 billion in 2011) shows that North America has the lead (see Figure 5.11), (Schaack *et al.*, 2013) (see Figure 5.11).

Figure 5.10: Organic retail sales in Europe and the EU-28, 2004-2012[16]

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006-2013, based on Eurostat and national data sources.

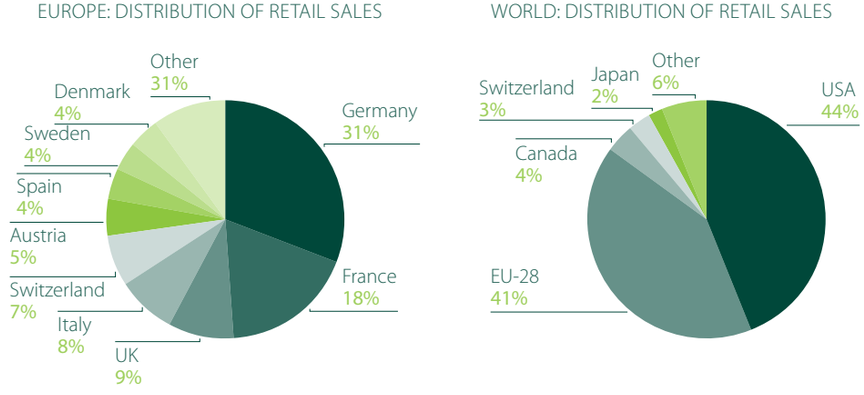

Figure 5.11: Distribution of retail sales in Europe, 2012; Distribution of retail sales worldwide, 2011

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006- 2013, based on Eurostat and national data sources.

Table 5.7: Market for organic food, 2012[17]

Country	Retail Sales (Million EUR)	Per capita consumption (EUR)	Share of total retail sales
Europe	22 670	34.7	
EU-28	20 817	41.7	
CPC	44.7	0.5	
EFTA	1 734	133.6	
Austria (2011)	1 065	127.0	6.5 %
Belgium	417	37.6	1.5 %
Bulgaria (2009)	7	0.9	
Croatia	104	24.0	2.2 %
Cyprus (2006)	2	1.9	
Czech Republic (2011)	66	6.0	0.7 %
Denmark	887	158.6	7.6 %
Estonia (2011)	20	14.9	1.6 %
Finland	202	37.4	1.9 %
France	4 004	61.0	2.4 %
Germany	7 040	86.0	3.7 %
Greece (2010)	60	5.2	0.4%
Hungary (2009)	25	2.5	0.3 %
Ireland (2011)	99	22.1	0.7 %
Italy	1 843	30.0	1.5 %
Latvia (2011)	4	2.0	0.2 %
Liechtenstein	5	129.0	
Lithuania (2011)	6	2.0	0.2 %
Luxembourg	75	143.0	3.1 %
Montenegro (2010)	0.1	0.2	0 %
Netherlands	791	47.2	2.3 %
Norway	209	42.0	1.2 %
Poland (2011)	120	3.8	0.3 %
Portugal (2011)	21	2.0	0.2 %
Romania (2011)	80	3.7	0.7 %
Serbia (2010)	40	5.5	
Slovakia (2010)	4	0.7	0.2 %
Slovenia	44	22.0	1.5 %
Spain	965	20.5	1 %
Sweden	918	95.3	3.9 %
Switzerland	1 520	189.2	6.3 %
Turkey (2009)	4	0.1	0 %
UK	1 950	31.8	

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006- 2013, based on Eurostat and national data sources. Per capita consumption and organic market shares for some countries have been calculated by FiBL and AMI.

Importance of organic product groups

Within the overall organic market in Europe, certain organic products are more dominant than others. A 2013 survey carried out as part of the OrganicDataNetwork (Willer and Schaack, 2013) produced the following results:

- Fruit and vegetables are the pioneering organic products in Europe. They now have shares of between one third and one fifth of many national organic markets. They are especially strong in Italy, Ireland, Norway, Sweden, and Germany. All over Europe, the organic market is dominated by fresh products compared to the conventional markets.

- In many countries, and in Northern Europe in particular, animal products, especially milk and dairy products, make up a high share of all organic products sold. Meat and meat products are very successful, with market shares of around 10 % in Belgium, the Netherlands, Finland, and France. On the other hand, in many countries, the meat and meat-based product market is not yet well developed, due to lack of manufacturing capacities and high price premiums compared to conventional products.

- Beverages – mainly wine – constitute an important part of the organic market – nearly 15 % in France and Croatia.

- Hot beverages (e.g. coffee, tea, and cocoa) make up 3 to 5 % of the organic market.

- Milled cereal products, which are easily sold and stored in the supermarkets, achieve high shares in the Czech Republic, Finland and Norway.

- Bread and bakery products are very important in the organic product range, with around 10 % of the market, in Switzerland, the Netherlands, France, Sweden, Finland, and Germany.

Comparison of organic products with total market

When comparing the market shares of organic products within the total market one of the success stories in many European countries is eggs. According to the OrganicDataNetwork survey, organic eggs have market shares of up to 20 % in Switzerland, and around 10 % in most of the countries for which where data was available (see Table 5.8). Sales of eggs reflect the high concerns of consumers with regards to animal welfare and also their readiness to pay relatively high price premiums. In Germany, for example, organic eggs are at least double the price of conventional eggs – one of the highest price differentials to be found within organic product groups.

After eggs, vegetables enjoy the highest market shares (in value), with organic accounting for 8 to 12 % of all vegetables sold in Switzerland, Austria and Germany.

In many countries, organic dairy products achieve market shares of about 5 % of all dairy products sold. In Switzerland, the figure is even 10 %.

Single products, such as organic baby food and meat substitutes, often achieve high shares of the total market in many European countries. Fresh carrots have a 30 % market share in Germany.

On the other hand, products like beverages and meat (especially poultry) generally have low market shares. (Willer and Schaack, 2013).

Table 5.8: Shares of organic product groups for total market in selected countries, 2011

Product group	Austria	Belgium	Finland	France	Germany	Norway	Switzerland
Beverages				2.5 %			2.1 %
Bread and bakery products			9.6 %	3.9 %	5.8 %		
Cheese	6.9 %		1.0 %	1.0 %	3.9 %	0.4 %	5.8 %
Eggs for consumption	17.9 %	8.7 %	9.0 %	14.4 %	13.2 %		19.2 %
Fruit	9.7 %				6.5 %		8.0 %
Meat and meat products	3.8 %	1.1 %		1.3 %	2.0 %	0.2 %	3.9 %
Milk and dairy products		1.8 %	2.0 %	1.7 %	5.5 %	1.7 %	10.1 %
Vegetables	10.2 %		4.0 %		8.2 %	1.9 %	12.2 %

Source: OrganicDataNetwork Survey 2012
Note: Due to classifications and nomenclatures differing from country to country it is not possible to supply data for all product groups. Not all countries have data on the shares of the organic products.

International trade

In many countries the growth of demand for organic products is outpacing the growth of the organic food supply. This is true in particular of the major markets like Germany, France, and Switzerland. Intra-EU trade and imports from third countries represent an important part of domestically consumed organic products. Dependence on imports, above all for processed products (whether from EU Member States or third countries) seems to be particularly prevalent in the new Member States (see also Chapter 6 in this volume). The lack of processing facilities means that organic processed food products consumed in the EU-13 are quite often imported from the EU-15.

A recent study shows that Germany is not only the largest market for organic products in Europe but also one of its largest organic producers. In spite of this fact, Germany imported between 2 % and 95 % of different organic products in 2009 and 2010, which could also have been produced in the country (Schaack *et al.*, 2011). For example 50 % of the apples were imported (mainly from Italy) as well as nearly 50 % of the carrots (mainly from the Netherlands and Israel).

Unfortunately, with the exception of Denmark and France, no country supplies data on exports and imports on a regular basis, and it is difficult to draw clear conclusions on the developments of exports and imports in the EU-28 and Europe.

CONCLUSION

Current available data on organic farming and the market in Europe and globally, show that in an international context, the European organic sector is well developed. Relatively high shares of agricultural land, a continual growth in the area and number of operators, as well as a fast growing market show the exceptional dynamics of this market in a global context.

The short data analysis provided in this report shows, however, that within the EU there are still large discrepancies between the countries. Even though the EU-13 countries have achieved considerable shares of organic agricultural land, consumer spending, though growing, remains low as a proportion of total spending on food in these countries. An issue of particular concern is the low number of processors, showing that the processing infrastructure – and thus the preconditions for adding value to organic products for export or, more importantly for placing on the domestic market, is still very much underdeveloped.

Another issue that needs to be solved is that of data availability. For instance, imports and exports play a very important role for the trade within the European Union and for the EU's international trade with external partners, but almost no data exists. Furthermore whilst the availability of domestic market data is improving, with a wide range of methods used for it collection. Strictly speaking it cannot be compared accurately. It is hoped that the Organic-DataNetwork,[17] funded under the 7th framework programme of the EU, can contribute to the improvement of the situation and to the development a clearer and detailed overview of the European organic market in the future.

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ENDNOTES

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4 Area, land use, crop and operator data: Austria: Lebensministerium; Belgium: Eurostat, Landbouw en Visserij; Bulgaria: Bioselena, Eurostat, Ministry of Agriculture Bulgaria; Croatia: Ministry of Agriculture, Croatia; Cyprus: Eurostat, Ministry of Agriculture (MOA); Czech Republic: Institute of Agricultural Economics and Information (UZEI); Denmark: Eurostat, Ministeriet for Fødevarer, Landbrug og Fiskeri; Estonia: Centre of Ecological Engineering; Finland: Eurostat, Evira; France: Agence Bio; Germany: Agricultural Market Information Company (AMI), Federal Agency for Agriculture and Food (BLE); Greece: Eurostat; Hungary: Eurostat; Iceland: Vottunarstofan Tún; Ireland: Eurostat, Department of Agriculture and Food; Italy: Ministry of Agriculture (MiPAAF) and Information System for Organic Farming (SINAB); Latvia: Eurostat; Liechtenstein: Klaus Büchel Anstalt (KBA); Lithuania: Eurostat; Luxembourg: Administration des services techniques de l'agriculture (ASTA), Eurostat, IBLA; Malta: Eurostat, Mediterranean Organic Agriculture Network (MOAN); Montenegro: Monteorganica; Netherlands: Eurostat; Norway: Debio, Eurostat, Norwegian Agricultural Authority (SLF); Poland: Eurostat; Portugal: Eurostat; MADRP; Romania: Eurostat; Serbia: Ministry of Agriculture, Forestry and Water, Mediterranean Organic Agriculture Network (MOAN); Slovakia; Eurostat; Slovenia: Eurostat; Spain: Eurostat; Sweden: Eurostat; Switzerland: Federal Agency for Statistics (BfS), FiBL; FYROM: Ministry of Agriculture, Forestry and Water Economy, Mediterranean Organic Agriculture Network (MOAN); Turkey: Ministry of Food Agriculture and Livestock, Mediterranean Organic Agriculture Network (MOAN); UK: Department for Environment, Food & Rural Affairs (DEFRA), Eurostat.

5 Market data: Austria: Organic Retailers Association; Belgium: VLAM, and GfK; Bulgaria: Bioselena; Croatia: Darko Znaor; Cyprus: Ecozept; Czech Republic: Institute of Agricultural Economics and Information (UZEI); Denmark: Danish Agriculture & Food Council/Organic Denmark/Statistics Denmark; Estonia: Centre of Ecological Engineering; Finland: Pro Luomo; France: Agence Bio; Germany: Agricultural Market Information Company (AMI); Greece: provided by N. van der Smissen; Hungary: Biokorsar Survey; Ireland: Bord Bia; Italy: AssoBio; Latvia: Ekoconnect; Liechtenstein: Klaus Büchel Anstalt (KBA); Lithuania: Ekoconnect; Luxembourg: IBLA; Montenegro: Ecozept; Netherlands: Bio-Monitor; Norway: Norwegian Agricultural Authority SLF; Poland: IFOAM EU Estimate; Portugal: Interbio; Romania: BCG-Global Advisors; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: Institute for Sustainable Development (ISD); Spain: MAGRAMA; Sweden: Statistics Sweden (SBC); Switzerland: Bio Suisse; Turkey: Estimate of the Ministry of Agriculture; UK: Soil Association

6 This report aims at giving an overview of the key data on organic agriculture in Europe as a whole. However, a special focus was put on the EU-28, EU CPC and EFTA countries. The data presented in this report wwas collected by the Research Institute of Organic Agriculture (FiBL), Switzerland, and the Agricultural Market Information Company (AMI), Germany in collaboration with the Mediterranean Agronomic Institute of Bari (IAMB). Data sources comprise Eurostat, national data sources, and information provided in the country reports for this publication. Furthermore, in the framework of the FP7 project OrganicDataNetwork, partners provided market data for some selected countries that were used for this report. More information available at: www.organicdatanetwork.net For historical data, FiBL and AMI used data collected over the past couple of years. Please note that 2012 data was not available for all countries; for these countries, the latest available data was used and the data year is indicated wherever possible. Some data may be provisional and may be subject to change. Efforts were made to ensure consistency between the data in the country reports and those presented in the following tables. However, in some cases the data may differ due to a number of reasons (e.g. different data sources, data not available at the time of writing of the country reports). The authors would like to thank all those who have provided data and information for this report, in particular the partners of the OrganicDataNetwork project. Special thanks go to Raymond Aendekerk, Biolabel - Verenegung fir Biologesche Landbau Letzebuerg, Luxembourg; Uygun Aksoy, Ege University, Turkey; Gerald Altena, Debia, Norway; Stoilko Apostolov, Bioselena: Foundation for organic agriculture, Bulgaria; Olivera Bicikliski, Ministry of Agriculture, Forestry and Water Management, FYROM; Marian Blom, Bionext, The Netherlands; Lorcan Bourke, Bord Bia, Ireland; Klaus Büchel, Klaus Büchel Anstalt, Liechtenstein; Johan Cejie, KRAV, Sweden; Marian Cioceanu, Bio Romania, Romania; Catarina Crisostomo, Portugal; Philip Cullen, Department of Agriculture, Food and Rural Development, The Organic Farming Unit, Ireland; Teresa De Matthaeis, MIPAAF, Ministero delle politiche agricole alimentari e forestali, Italy; Zoltán Dezsény, Hungarian Research Institute of Organic Agriculture (ÖMKi), Hungary; Dóra Drexler, Hungarian Research Institute of Organic Agriculture (ÖMKi), Hungary; Tomaz Dzuban, Ministry of Agriculture, Forestry and Food, Ljubljana, Slovenia; Tomas Fibiger Norfelt, Knowledge Centre For Agriculture, Denmark; Dorian Flechet, Agence Bio, France; Lisa Gauvrit, ECOZEPT; France; Catherine Gerrard, Organic Research Centre, UK; Francesco Giardina, Sistema d'informazione nazionale sull'agricoltura biologica (SINAB), Italy; Victor Gonzálvez, Sociedad Española de Agricultura Ecológica (SEAE), Spain; Gunnar Á. Gunnarsson, Vottunarstofan Tún ehf., Reykjavik, Iceland;; Sarah Harris, Defra, UK; Sampsa Heinonen, Evira, Finland; Otto Hofer, Lebensministerium/ BMLFUW, Austria; Andrea Hrabalová, Institute of Agricultural Economics and Information, Czech Republic; Helmut Hübsch, GfK, Nürnberg, Germany; Jakub Husák, Czech University of Life Sciences (CULS), Czech Republic; Basri Hyseni, Initiative for acricultural development of Kosovo (IADK), Kosovo; Josefine Johansson Zuazu, IFOAM EU, Belgium; Iris Kazazi, Albanian Association of Marketing, Albania; Burcin Keremoglu, IMO-CONTROL Sertifikasyon Tic. Ltd. Sti., Izmir, Turkey; Andrey Khodus, Ecocontrol, Russia; Elisabeth Klingbacher, FiBL Austria, Austria; Marja-Riitta Kottila, Pro

Luomu, Finland; Kai Kreuzer, Biomakt.info, Germany; Clara Larsson, Statistics Sweden, Sweden; Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Switzerland; Ralph Liebing, ORA ~ Organic Retailers Association, Austria; Michal Lošťák, Czech University of Life Sciences (CULS),Faculty of Economics and Management, Czech Republic; Grace Maher, Irish Organic Farmers & Growers Association, Ireland; Boldizsár Megyesi, Hétfa Research Institute, Hungary; Elisabeth Mercier Agence Bio, France; Stephen Meredith, IFOAM EU, Belgium ; Dorota Metera, Bioekspert, Poland; Merit Mikk, Centre of Ecological Engineering, Estonia; Jelena Milic, Ministry of Agriculture, Forestry and Water Management, Serbia; Eugene Milovanov, Organic Federation of Ukraine, Ukraine; Natasa Mirecki, University of Montenegro, Biotechnical Faculty, Montenegro; Mersida Musabegovic, Organska Kontrola (OK), Bosnia & Herzegovina; Darija Musulin, Ministry of Agriculture, Croatia; Aleksandra Nikolic, University of Sarajevo, Bosnia and Herzegovina; Gustavs Norkārklis, Association of Latvian Organic Agriculture, Lativa; Susanne Padel, Organic Research Centre, UK; Ejvind Pedersen, Landbrug & Fødevarer, Copenhagen; Elias Pfäffli, bio.inspecta, Switzerland; Joan Picazos, Biocop Productos Biológicos, S.A. (BIOCOP), Spain; Roberto Pinton, ASSOBIO, Italy; Patrizia Pugliese, and Lina Al-Bitar, International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM), Mediterranean Agronomic Institute of Bari (IAMB), Italy; Nathalie Rison, Agence Bio, France; Elisabeth Rohner-Thielen, Eurostat - Statistical Office of the European Union, Luxembourg; Marta Romeo, Sistema d'informazione nazionale sull'agricoltura biologica -SINAB, Italy; Elin Røsnes, Norwegian Agricultural Authority SLF, Norway; Vincent Samborski, Landbouw en Visserij, Belgium; Burkhard Schaer, ECOZEPT, France; Aender Schanck, BIOGROS Logistique, Luxembourg; Virgilijus Skulskis, Lithuanian Institute of Agrarian Economics (LIAE), Lithuania; Anamarija Slabe, Institut za trajnostni razvoj, Slovenia; Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Switzerland; Nicolette van der Smissen, Greece; Francesco Solfanelli, Università Politecnica delle Marche, Italy; Matthias Stolze, Research Institute of Organic Agriculture (FiBL), Switzerland, Erdal Süngü, Ministry of Food Agriculture and Animal Husbandry; Turkey, Paul Verbeke, BioForum Vlaanderen; Belgium; Daniela Vairo, Università Politecnica delle Marche, Italy; Paul Verbeke, BioForum Vlaanderen, Antwerpen, Belgium; Katerina Wolf, KRAV Ekonomisk förening, Sweden Raffaele Zanoli, Università Politecnica delle Marche, Italy; Darko Znaor, Independent Consultant, Zagreb, Croatia. Special thanks to the Swiss State Secretariat of Economic Affairs (SECO) and NürnbergMesse, the organisers of the BioFach World Organic Trade Fair, for providing continual support to FiBL for the data collection on organic agriculture worldwide.

7 Candidate and Potential candidate (CPC) countries refers to EU Candidate countries - Montenegro, Serbia, the Former Yugoslav Republic of Macedonia (FYROM) and Turkey and, Potential candidates - Albania, Bosnia and Herzegovina, Kosovo. More information available at: www.europa.eu/about-eu/countries. Please note that data collection systems in some CPC countries are still under development. This sometimes results in inconsistent reporting and explains discrepancies.

8 EFTA refers to Iceland, Norway, Switzerland, and Liechtenstein.

9 EU-15 refers to the 15 Member States of the EU before 2004, Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, United Kingdom (UK).

10 EU-13 refers to the 13 Member States of the EU that joined from and after 2004, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, and Slovenia.

11 Global data are from 2011 according to FiBL (Willer et al., 2013).

12 Countries with a share of at least 0.1 %.

13 Total includes other agricultural land and land for which no further details were available.

14 Data for 2012 was not available for all countries.

15 Only countries with more than 1000 hectares

16 Based on provisional data for 2012

17 Blank cells refer to no information available. Where no published data exists, best estimates from a range of experts have been used, but these were not available for2012 for all cases, so sometimes earlier estimates are shown. Shares of all retail sales calculated by AMI and FIBL where the national data sources did not provide data. Values published in national currencies were converted to euros using the 2012 average exchange rates (central European Bank). Revisions and updates should be sent to helga.willer@fibl.org.

06 COUNTRY REPORTS

Helga Willer, Marie Reine Bteich and Stephen Meredith

INTRODUCTION

Organic food and agriculture has a significant presence throughout Europe. Whilst the current growth trends, outlined in Chapter 5 of this volume, give a clear synopsis of the sector's ongoing development, the country reports presented in this section provide a snapshot in time of the prospects in different countries as well as outlining the diversity of European organic farming and markets.

This section builds on the information and analysis in Chapter 5, with reports from over 30 countries. The reports begin by summarising the key indicators for 2012, from developments in the area of agricultural land under organic production and the number of different organic operators to the latest information on the organic market and trade. In addition the authors observe the sector's current highlights and history, key institutions, production base and the market for organic products. The reports also consider the application of organic standards, legislation and logos and public policy and research and advice environment in each country. Finally the authors look at the challenges and outlook for the future as well as sources for finding further information.

It is a little over a decade since a similar exercise was conducted by the German Foundation Ecology & Agriculture (Stiftung Ökologie & Landbau - SÖL), who compiled country reports on organic farming in 25 European countries, in association with the Research Institute of Organic Agriculture (FiBL). The editors therefore hope that these new reports can build on the success of this previous exercise and wish to take this opportunity to thank all experts who contributed to this section. While all efforts were taken to collect reports for each country not all information was available at time of press. Readers will therefore be able to find additional country reports and the latest information at: www.ifoam-eu.org. The editors trust that the reports will provide organic stakeholders, policymakers, journalists and other interest parties with a fresh overview of organic developments across Europe.[1]

AUSTRIA

Elisabeth Klingbacher[1a]

KEY INDICATORS 2012[2]

Area	Organic agricultural area	533 230 hectares
	Change 2002 to 2012	+25.4 %
	Change 2011 to 2012	-0.7 %
	Share of total agricultural area	19.7 %
Operators	Organic producers	21 843
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 1 064.7 million (2011)
	Share of total market	6.5 % (approx.)
	Per capita consumption	EUR 127 (2011)
	Change in retail sales 2010 to 2011	+8 %
	Organic exports	EUR 79.7 million (2011)
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- 20th *Freiland-Tagung*, one of the most important and successful animal husbandry conferences in German-speaking countries (2013)
- FiBL Austria celebrates its 10th anniversary (2014)
- The marketing of organic products via conventional supermarket chains as well as the organic line Ja!natürlich celebrates its 20th anniversary (2014)

HISTORY OF ORGANIC FARMING

- 1920s: The first organic farms are established
- 1979: Foundation of Ernte für das Leben, the largest organic farming association at that time
- 1990s: Organic sector expansion (increasing ecological awareness, marketing via supermarket chains, implementation of the Austrian agri-environment programme)
- 2004: Foundation of the Research Institute of Organic Agriculture (FiBL) Austria
- 2005: Foundation of Bio Austria, Austria's largest organic farmers organisation

KEY SECTOR INSTITUTIONS

- Bio Austria: www.bio-austria.at
- Research Institute of Organic Agriculture (FiBL) Austria: www.fibl.org
- University of Natural Resources and Applied Life Sciences, Vienna: www.nas.boku.ac.at

PRODUCTION BASE: LAND USE AND KEY CROPS

- Of the total organic area of 533 230 hectares, 63.1 % consists of permanent grassland and grazing area, 35.7 % arable land and 1.2 % permanent crops
- The key arable crops are cereals (97 178 hectares), green fodder from arable land including temporary grasses and grazing areas (53 899 hectares) and oilseeds (14 586)
- The key permanent crops are grapes (4 259 hectares), apples (978 hectares), and berries (265 hectares)

MARKET[3]

The organic market in Austria is dominated by conventional supermarket chains and discounters which account for about two-thirds of the annual turnover. Specialised organic shops also play an important role and are expanding and modernising their premises, while organic supermarkets are attracting new customers. Another important and growing marketing channel is catering, in both the public and private sectors.

Top-selling products: Eggs (18.4 % of all eggs sold on the food market), milk (17.8 %), potatoes (17.2 %), fresh vegetables (11.6 %) and butter (11 %).

Market channels: Distribution comprises general retailers (78.9 %), organic retailers (15.1 %) and direct sales (6 %). The data are from 2011.

STANDARDS, LEGISLATION, ORGANIC LOGO

The EU legislation on organic farming, other regulations and Chapter A 8 of the *Codex Alimentarius Austriacus* (Austrian food codex) apply.

In addition to the code number of the control agency and the logo of the European Union (EU), the AMA label for organic farming may be printed on the product. This label exists in two variations:

- The label *Austria Bio-Zeichen* (with indication of origin) may be used by approved organic farmers, processors and trading companies. It guarantees that products showing this label originate from organic farming and that at least 70 % of all ingredients originate from domestic organic farming
- The label *Bio-Zeichen* (without indication of origin) does not refer to the regional origin. Products with this label have been produced according to organic standards but less than 70 % of the ingredients originate from Austrian organic production

Additionally there are various organic logos of organic associations such as Bio Austria and from supermarket chains and discounters.

POLICY SUPPORT

National action plan: The Organic Farming Action Plan of the Ministry of Life, www.lebensministerium.at is intended to improve marketing strategies, and to undertake public relations work to further increase the market share of organic products. The most recent Organic Farming Action Programme (2008 – 2013) (*Bio-Aktionsprogramm 2008 – 2013*) includes the following goals:

- All products produced according to organic farming criteria are marketed as organic products.
- Capacities are created enabling the demand for organic foods to be satisfied predominantly from Austria
- The market share is increased further, especially for organic products for which there is less demand (for instance meat and meat products)
- The production of organic products which are not yet available in sufficient quantities (such as fruit and vegetables) is stimulated
- The public are better informed about the environmental services provided by organic farming and students of agricultural schools are provided with more comprehensive knowledge about organic farming

Support under EU rural development programmes: The Austrian Agri-environmental Programme (*Österreichisches Programm zur Förderung einer umweltgerechten, extensiven und den natürlichen Lebensraum schützenden Landwirtschaft ÖPUL*) aims to ensure that the environmental impacts of domestic agriculture are taken into account. ÖPUL 2007-2013 operates through approximately 30 measures. From the perspective the Austrian government the Organic Farming measure is seen as important to maintain Austria's position as the leading country for organic farming, in terms of total share of organically managed agricultural land.

In 2011, more than 20 000 organic farmers received compensatory payments under the national measure *Organic farm management* amounting to EUR 99.6 million. Altogether, some EUR 168 million, or 30 % of the total ÖPUL funds, were paid to organic farmers.

RESEARCH & ADVICE

The main institutions engaging in research on organic agriculture are FiBL Austria, the University of Natural Resources and Applied Life Sciences in Vienna, the Agricultural Research and Education Centre Raumberg-Gumpenstein www.raumberg-gumpenstein.at and the Organic Research Austria (Bio Forschung Austria) www.bioforschung.at. Advice, training courses, and technical information for practitioners are provided by Bio Austria, the regional chambers of agriculture, and FiBL Austria.

CHALLENGES & OUTLOOK

Austria plays a leading role in organic agriculture, and experts predict an upward trend for the organic market. However, in order to achieve the goal of maintaining the proportion of organic farms and organic area, and to expand organic agriculture in the long term, all relevant players, including policymakers, market players, researchers, producers, and consumers need to cooperate. The future poses several challenges for organic agriculture as a forward-looking and sustainable strategy for society. It will be important to accomplish the balancing act between greater professionalism and sector growth without losing sight of the fundamental ideals and core values of organic agriculture.

FURTHER INFORMATION

- Organic Eprints for Austria: www.orgprints.org/view/projects/at.html
- Ministry of Life, organic farming pages: www.lebensministerium.at/en/fields/agriculture/Organicfarming.html

For other relevant websites, see the sections on key sector institutions and research & advice.

BELGIUM[4]

Paul Verbeke[5]

KEY INDICATORS 2012[6]

Area	Organic agricultural area	Flanders: 4 939 hectares Wallonia: 54 745 hectares Belgium: 59 684 hectares
	Change 2002 to 2012	Flanders: +27 % Wallonia: +176 % Belgium: +148 %
	Change 2011 to 2012	Belgium: +8 %
Operators	Organic producers	Flanders: 299 Wallonia: 1 090 Belgium: 1 389
	Organic processors	691 (2011)
	Organic importers	121 (2011)
	Organic exporters	No data
Market and trade	Retail sales Share of total market	Belgium: EUR 417 million Belgium: 1.5 % (1.9 % fresh products)
	Per capita consumption	Belgium: EUR 37.9
	Change in retail sales 2011 to 2012	+7 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- Flemish action plan *Strategisch Plan Biologische Landbouw 2013 - 2017*
- Walloon action plan *Plan stratégique pour le développement de l'agriculture biologique en Wallonie à l'horizon 2020*

HISTORY OF ORGANIC FARMING

- 1960: The first organic farmer in Flanders
- 1970: VELT, Association of Ecological Living and Gardening (*Vereniging voor Ecologische Leef- en Teeltwijze*) is founded
- 1982: The private organic label BioGarantie is launched
- 1992: The first two control bodies are founded
- 1998: PCBT (*Interprovinciaal Proefcentrum voor de Biologische Teelt*), the first organic demonstration and research farm, is founded
- 1999: The organic sector organisation BioForum is founded

KEY SECTOR INSTITUTIONS

Belgium

- Biogarantie, owner of private Belgian organic logo: www.biogarantie.be

Flanders

- BioForum Flanders (*BioForum Vlaanderen),* sector organisation: www.bioforumvlaanderen.be
- Coordination Centre for Applied Research in Organic Agriculture (*Coördinatiecentrum praktijkgericht onderzoek en voorlichting Biologische Teelt - CCBT*): www.ccbt.be
- Flemish Centre for the Marketing of Agricultural and Fishery products (*Vlaams Centrum voor Agro- en Visserijmarketing vzw - VLAM)*: www.vlam.be/who/
- Inagro – extension, research and other services: www.inagro.be

Wallonia

- BioForum Wallonia (*BioForum Wallonie*), sector organisation: www.biowallonie.be
- Centre for Organic Field Experiments (*Centre d'Essais Bio - CEB*)
- *Nature & Progrès*, promotion of organic agriculture: www.natpro.be
- National Union of Organic Producers (UNAB): www.unab-bio.be

PRODUCTION BASE: LAND USE AND KEY CROPS

- Of the total organic area (55 304 hectares in 2011) 71.9 % consists of permanent grassland and grazing area, 26.6 % is arable land and 1 % permanent cropland
- The key arable crops are green fodder from arable land including temporary grasses and grazing areas (6 233 hectares), cereals - mainly wheat, triticale and barley – (4 816 hectares), protein crops (1 284 hectares), and vegetables (744 hectares)
- The key permanent crops are orchards with temperate fruits (439 hectares, 214 hectares of which are apples; and 72 hectares of berries).

MARKET

The Belgian organic market is rather small, but has grown steadily in the past years. The per capita spending on organic products is about EUR 37.9. The market share for fresh organic products is 1.9 %, and for all organic products it is 1.5 %.

Top-selling products: Meat substitutes (24.5 % of all meat substitutes), eggs (8.9 %), and vegetables (5 %). These are sorted by share of the respective total market.

Market channels: Distribution comprises general retailers (44.4 %), discounters such as Aldi and Lidl (4.2 %), local groceries (11.5 %), farmers' markets (4.3 %), specialised organic shops (31.5 %) and farm stores, vegetable boxes and direct selling (4.1 %).

Exports and imports: Global data on exports and imports are not (publically) available. As Belgium is a small country situated between producer (e.g. The Netherlands) and/or consumer (e.g. Germany) countries, it may be assumed that many products are imported and exported. We assume that more products are imported than exported.

For instance, up to 90 % of raw vegetables for frozen or canned vegetable production are imported from Germany and the Netherlands. However, up to 90 % of the finished frozen or canned products are again exported. Organic eggs on the Belgian market are mainly of Belgian origin.

STANDARDS, LEGISLATION, ORGANIC LOGO

In Belgium, the EU legislation on organic farming, other regulations, and regional (Flemish and Walloon) legislation apply.

Most organic products bear the Belgian label Biogarantie. This is a private label that has existed for more than 30 years and is owned by the non-profit organisation Biogarantie vzw, which represents the Belgian organic sector. It can only be used on organic certified products and after the payment of royalties and membership. The standards are broader than EU legislation on organic farming and take different aspects of sustainability during production and handling into account. The Biogarantie label signifies that a product is more than just organic.

There are quite a lot of foreign organic products on the Belgian market, with one or more labels. In Belgium, the best known labels are the EKO logo from the Netherlands, the Agriculture Biologique (AB) logo from France, and the German labels. Foreign organic products can also obtain the Belgian Biogarantie label. This facilitates recognition by the Belgian consumer. Some products comply with the standards of the organic-dynamic movement. In Belgium, only a few farmers follow Demeter, and products are only sold in specialised organic shops.

POLICY SUPPORT

National action plans: The Flemish and Walloon regions both have their own action plans. In Flanders there is the *Strategisch Plan Biologische Landbouw 2013 to 2017,* which focuses on sustainable qualitative and quantitative growth of organic agriculture in Flanders and balanced market development. Wallonia has the *Plan stratégique pour le développement de l'agriculture biologique en Wallonie à l'horizon 2020.*

Support under EU rural development programmes: The Flemish and Walloon regions each have their own programmes. Different financial support measures are available for organic farmers. These include support for investments, organic inspections and certification costs, as well as organic area payments and extension services, and assistance in planning the conversion to organic production.

RESEARCH & ADVICE

The Flemish and the Walloon region each have their own research and extension programmes. In Flanders, organic research is coordinated by CCBT. Research and extension itself is conducted by six agricultural institutes, each with its own specialisation. Five of them work in both conventional and organic research and extension. One, Inagro, has a division working exclusively on crop production. In Wallonia, research is conducted by CEB.

CHALLENGES & OUTLOOK

Important challenges include the needs to achieve a balance between the supply and demand of organic products, and to stimulate conventional farmers to convert to organic farming. More organic farmers are needed to supply the domestic market with domestic organic produce.

FURTHER INFORMATION

Belgium

- Organic Eprints for Belgium: www.orgprints.org/view/projects/Belgium.html

Flanders

- *Bio Mijn Natuur*, Information for consumers: www.biomijnnatuur.be
- Database of Belgian organic products for producers, processors, retailers and traders: www.biobedrijvengids.be
- Annual organic week: www.bioweek.be

Wallonia

- *Centre Pilote Bio*, training for organic producers and applied research: www.cebio.be
- Annual organic week: www.semainebio.be

For other relevant websites, see the section on key sector institutions.

BULGARIA

Stoilko Apostolov[7]

KEY INDICATORS 2012[8]

Area	Organic agricultural area	39 138 hectares
	Share of total agricultural area	1.3 %
	Change 2011 to 2012	57 %
Operators	Organic producers	2 754
	Organic processors	81
	Organic importers	1
	Organic exporters	14
Market and trade	Retail sales	According to unofficial information, the market for organic products in Bulgaria ranged from EUR 6 – 8 million in 2009.
	Share of total market	No data
	Per capita consumption	Approximately EUR 1
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2014

- A new national rural development programme will be launched in 2014, with possible compensatory payments for organic livestock.

HISTORY OF ORGANIC FARMING

- 1987: The Agroecological centre is established at the Agricultural University Plovdiv
- 1996: Bioselena, the foundation for organic agriculture, is established
- 2001: National organic legislation published
- 2001: First organic certification in Bulgaria
- 2004: First organic shop in Sofia
- 2005: Organic food can be found for the first time in supermarkets
- 2008: *Organic boom* – more than 1 500 shops selling organic products
- 2008: First compensatory payments available for organic farming under measure 214 of the national rural development programme
- 2009 Bulgarian organic farmers' association established

KEY SECTOR INSTITUTIONS

- Ministry of Agriculture and Food (MoAF): www.mzh.government.bg
- Bulgarian organic products Association (BOPA): www.bgbio.org
- Foundation for organic agriculture, Bioselena: www.bioselena.com
- Bulgarian organic trade association: www.abt-bulgaria.org
- Agricultural University Plovdiv: www.au-plovdiv.bg

PRODUCTION BASE: LAND USE AND KEY CROPS

- Of the total organic area of 39 138 hectares (2012), 45.8 % consists of arable land, 28 % permanent crops, and 20.3 % permanent grassland and grazing areas
- The key arable crops are cereals, primarily wheat (7 532 hectares), oilseeds (primarily sunflower and rape; 3 292 hectares), and green fodder from arable land including temporary grasses and grazing areas (2 044 hectares)
- The key permanent crops are nuts, primarily walnuts and hazelnuts (5 981 hectares), orchards with temperate fruits (2 155 hectares), and vineyards (2 058)
- In addition to organic agricultural area, Bulgaria has a notable organic wild collection area of 473 941 hectares

MARKET

Both production and the market are growing rapidly, but organic producers continue to mainly export raw materials. An estimated 90 % of the organic products are exported as raw material, whilst 95 % of the organic goods consumed domestically are imported. Almost all supermarket chains offer organic products. The number of specialised shops for organic products is increasing. There are no national statistics for market data. According to the only survey conducted by Bioselena, in early 2009 (unofficial information), the volume of the market for organic products in Bulgaria ranges from EUR 6-8 million.

Top-selling products: Baby foods and dairy products (milk, yoghurt, cheese).

Exports and imports: Most of the organic products (about 90 %) are exported to Central and Western European countries, North America, and Japan. There is no official data on exports. About 90 % of organic products marketed in Bulgaria are imported from the European Union. There are no imports from third countries.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations directly applicable in Bulgaria. The national ordinance N. 1/2013 regulates the work of the control bodies.

The national organic logo is voluntary and free, but rarely used. The Ministry of Agriculture and Food owns the logo.

POLICY SUPPORT

National action plan: Bulgaria has a national action plan for the development of organic farming in Bulgaria 2007-2013 (*Националенпланзаразвитиенабиологичнотоземеделие в България 2007-2013*).[9] The total budget is approximately EUR 82 million. Its goals include that 8 % of agricultural land should be managed organically by 2013, and 3 % of the food sold in Bulgaria should be organic by 2013.

Support under EU rural development programmes: Compensatory payments under agri-environment schemes have been available since 2008. The payments are higher during the transition period and depend on the crop. Lower payments are made for pastures and meadows (EUR 120 per hectare); the highest payments are for orchards and vineyards (EUR 729 per hectare). Payments for organic apiculture are EUR 18.5 per beehive. Additional points are given to organic farmers for investments and for the projects of young farmers.

Extension services for farmers and forest owners (Measure 143) under the national rural development programme have been implemented since the end of 2010. This offers farmers the use of consultancy services. The maximum value of the services supported is EUR 1 500 per farm for a period of two years. 80 % of the sum spent by the farmer is refunded through the programme. Only 83 farmers have applied; 12 consultancy organisations were approved by the Ministry of Agriculture and Food (including Bioselena and Agrarian University of Plovdiv).

RESEARCH & ADVICE

Organic research is occasionally undertaken by some NGOs and research institutes as part of international projects. NGOs, private companies and research institutes offer advice on organic production and processing.

Specialised consulting organisations, such as Bioselena, offer advice to farmers. Some of the researchers also offer consulting services. Traders in fertilisers and plant protection products also offer advice. The Agrarian University of Plovdiv offers a facultative academic programme of 30 hours for students, as well as master degree programmes in organic farming. Bioselena offers professional training in organic agriculture for farmers.

CHALLENGES & OUTLOOK

Certified organic livestock farms make up only a small share of all organic farms (there are only 18 livestock farms out of 2 754 farms). This creates an imbalance in production, and it diverges from the principles of organic agriculture, which view animals as an essential element for the nutrients cycle on the farm.

FURTHER INFORMATION

- Organic Eprints for Bulgaria: www.orgprints.org/view/projects/bg.html

For other relevant websites, see the section on key sector institutions.

CROATIA

Darko Znaor[10]

KEY INDICATORS 2012[11]

Area	Organic agricultural area	31 904 hectares
	Change 2002 to 2012	+4563 %
	Change 2011 to 2012	-0.4 %
	Share of total agricultural area	2.4 %
Operators	Organic producers	1 528
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 104 million (approx.)
	Share of total market	2.2 %
	Per capita consumption	EUR 24
	Change in retail sales 2011 to 2012	0.7 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- Croatia joined the European Union (EU), thus importing and exporting organic produce from and to EU countries have become easier
- A peer-reviewed study on the environmental and economic feasibility of large-scale conversion to organic farming in Croatia was published by the Heinrich Böll Foundation[12]

HISTORY OF ORGANIC FARMING

- 1861: Rudolf Steiner, founder of bio-dynamic agriculture born in Croatia
- 1970s: First publications on organic farming by Pavao Kriković
- 1991: Establishment of BIOS, the first organic farming association
- 1996: Book, *Organic Farming – Farming for the Future*, published
- 2001: Law on organic farming adopted, followed by first certified production in 2002 and 2003

KEY SECTOR INSTITUTIONS

- Association of Croatian Organic Agriculture Producers: www.eko-sever.hr
- Agricultural Advisory Service: www.savjetodavna.hr
- Bioinspekt (certification): www.bioinspekt.com
- Zadruga Agri Biocert (certification): www.agribiocert.hr
- Biotechnicon (certification): www.biotechnicon.hr/certifikacijsko_tijelo.asp

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 31 900 hectares under organic cultivation, 56 % consists of arable crops, 24 % grassland, 13 % orchards and vineyards, 4 % herbs/medical plants and 3 % other crops. The key arable crops are cereals and oil crops (notably soya). Exact data is not publicly available. Cherries, sour cherries, apples and olives occupy the majority of the area of 2 800 hectares under fruit production. Grapes are grown on 634 hectares and herbs/medical plants on 1 160 hectares.

MARKET

The organic market has been steadily growing over the last couple of years. Processing is still at an early stage of development, but is becoming more popular among organic producers. Most baby food in Croatia is organic, but nearly all is imported.

Top-selling products: There is no precise data on the best-selling products, but organic baby food, soya and cereal drinks are in high demand and can be found in nearly all supermarkets.

Market channels: There is no precise data on market channels, but the great majority of organic food and drinks are sold by general retailers. Two major Croatian traders with shops in the bigger cities dominate the specialised retail segment. Direct marketing is limited, partly due to complicated administrative procedures and controls. Internet sales are becoming more popular. Fresh fruits and vegetables are also sold at farmers markets.

Exports and imports: Data on exports and imports are not publicly available, but some estimates suggest that imported produce makes up approximately 60 % of the value of the organic food and drinks market.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Law on Organic Farming Production and Sale of Organic Farming Produce (Official Gazette 139/10) and several by-laws are in place, and they are being implemented and enforced fairly well. Since July 2013, the EU legislation on organic farming and other regulations are applied.

There is a national organic logo in green and white, with the text: *Croatian ECO produce*.

POLICY SUPPORT

National action plan: An Action Plan 2011-2016 was adopted in 2011, targeting use of 8 % of the total agricultural area for organic production by 2016. Its implementation is patchy, with no systematic monitoring, public reporting or funding available.

Support under EU rural development programmes: Croatia became a member of the EU on 1 July 2013. Organic farming payments have existed since 2005 and are approximately 30 % higher than conventional payments. However, organic farmers (like their conventional colleagues) receive these funds with a great delay of up to two years.

Other policy support: Funding by the central and regional governments for certain events, notably agricultural fairs and free extension services as part of the public extension service.

RESEARCH & ADVICE

Research on organic farming is marginal and practised only by individuals with a particular interest. Farmers can receive free advisory services and training through the public extension service.

CHALLENGES & OUTLOOK

Over the last ten years, the organically farmed area has increased by about 35 % per year, although in 2012, the organic area shrank by 0.4 %. This is because a significant number of farms, including some major producers, were no longer granted in-conversion status in 2012. There are significant subsidies for organic production, and effective organic advisory, inspection and certification services. EU membership will offer new funding opportunities and will further ease trade to and from EU countries.

FURTHER INFORMATION

- Organic Eprints for Croatia: www.orgprints.org/view/projects/Croatia.html
- Ecologica, with information for organic farmers and producers: www.ecologica.hr
- BioBio, a leading specialised retailer: www.biobio.hr
- Garden, the second largest specialised retailer: www.garden.hr/o-gardenu
- Ministry of Agriculture, organic farming pages: www.mps.hr/default.aspx?id=6184

For other relevant websites, see the section on key sector institutions.

CZECH REPUBLIC

Andrea Hrabalová[13]

KEY INDICATORS 2012[14]

Area	Organic agricultural area	488 658 hectares
	Change 2002 to 2012	+108 %
	Change 2011 to 2012	+1.2 %
	Share of total agricultural area	11.46 %
Operators	Organic Producers	3 934
	Organic processors	454
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 66 million (2011)
	Share of total market	0.65 % (2011)
	Per capita consumption	EUR 6 (2011)
	Change in retail sales 2010 to 2011	+4.6 % (2010-2011)
	Organic exports	EUR 23 million (2011) (approx.)
	Organic imports	

HIGHLIGHTS FOR 2013

- The organic movement is preparing new, individual measures for organic farming in the Rural Development Programme
- The fourth control body, Bureau Veritas Czech Republic, entered into operation

HISTORY OF ORGANIC FARMING

- 1993: The first national directive for organic farming, including an inspection and certification system, is established, and the national BIO label is introduced
- 2001: Act No. 242/2000 on organic farming comes into force and the Ministry of Agriculture entrusts KEZ o.p.s. with inspection and certification
- 2004: Support for organic farming is implemented as a part of agri-environmental measures within the Rural Development Plan (2004-2006); Action Plan for Organic Farming to 2010 is approved
- 2006: New control bodies start to operate: ABCert AG and Biokont CZ
- 2010: Action Plan for Developing Organic Farming in 2011-2015 is approved, and UKZUZ (Central Institute for Supervising and Testing in Agriculture) starts to carry out official state controls of organic farming

KEY SECTOR INSTITUTIONS

- KEZ, inspection body: www.kez.cz
- ABCERT AG, inspection body: www.abcert.cz
- Biokont CZ, inspection body: www.biokont.cz
- ÚKZÚZ, Central Institute for Supervising and Testing in Agriculture: www.ukzuz.cz
- PRO-BIO Association of organic farmers: www.pro-bio.cz
- Bioinstitut, Institute for Organic Agriculture and Sustainable Landscape Development: www.bioinstitut.cz
- ČTPEZ, the Czech Technology Platform for Organic Agriculture: www.ctpez.cz

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic agricultural area of 488 658 hectares (2012), 83.1 % consists of permanent pasture and grazing areas, 11.8 % arable land and 1.6 % permanent crops, while 3.5 % is given over to other uses (hedges, boundaries, landscape features, trees, avenues, etc.). The key arable crops (2011) are green fodder from arable land (25 500 hectares) and cereals (24 400 hectares). The key permanent crops (2011) are fruit (6 300 hectares, 2 300 of which are apples), grapes (1 000 hectares) and hops (11 hectares).

MARKET

After a significant increase in the organic food market in 2005-2008, turnover has stagnated in recent years (increase in 2011 was 4.6 %). The share of organics in total food and beverage consumption remains below 1 %, and the average per capita consumption in 2011 did not rise above EUR 6. Even so, the Czech organic food market is one of the most advanced among the countries of Central and Eastern Europe.

Top-selling products: Milk and dairy products (19.6 %; EUR 13.0 million), baby food (16.0 %; EUR 10.6 million) and fruit and vegetables, including juice (13.6 %; EUR 9.0 million).

Market channels: General retailers (supermarkets/hypermarkets; 65 %), specialised shops with health and organic food (20 %), direct marketing, mainly from farms and other forms of direct sale (5 %), pharmacies (5 %), drugstores (3 %), independent small food shops (1 %), and gastronomy (1 %)

Exports and imports: In 2011, around 25 % (EUR 23 million) of the total turnover of Czech organic operators came from exports – mainly to Austria and other countries of the European Union (EU) not bordering the Czech Republic (estimated figures only).

The share of total organic consumption taken by imported organic foodstuffs is 46 % for processed food. This figure rises to 60 % if foodstuffs for further processing are included. The main import products are processed foodstuffs from Germany and Austria, mainly baby foods (more than 50 % of imports) and processed fruits and vegetables, including juice, coffee, tea, chocolates and non-alcoholic drinks.

STANDARDS, LEGISLATION, ORGANIC LOGO

In the Czech Republic, organic farming has its own law (Act No. 242/2000 on organic farming), which came into force in 2001 and remains valid. Decree No. 16/2006 sets out the rules of usage for the national organic logo.

The Czech Republic has a national organic logo, the *Bio zebra*. There is a discussion on the future of the Czech logo. With the mandatory use of the organic logo of the EU, the two logos (national and EU) communicate the same information to the consumer. Therefore, it was decided that a national logo should be used only for domestic Czech organic food production. The realisation of this strategy is not finished yet.

POLICY SUPPORT

National action plan: The Action plan of the Czech Republic for the development of organic farming 2011-2015 (*Akční plán ČR pro rozvoj ekologického zemědělství v letech 2011-2015*) runs from 2011 to 2015. It has six main targets, the first being to achieve a 15 % share of all agricultural land – including a minimum of 20 % of arable land – for organic farming[15].

Support under EU rural development programmes: Support for the establishment of organic farms was first made available as early as 1990–1992. State support for organic farming was renewed in 1998. Until 2003 it was provided on the basis of a government regulation that specified programmes to support non-productive functions of agriculture. Since 2004, support for organic farming has been provided under the agri-environmental measures of the EU rural development programme. Since 2007, companies registered in organic farming can also utilise their bonus points for further measures within Axes I and III, and they have a much greater chance of getting their projects approved and financed. Advice on organic farming issues is one of the areas supported under the measure *Use of advisory services* within Axis I.

Other policy support: Support from the Ministry of Agriculture for promotional and education events, such as the Organic Food Month, the Bioacademy Lednice, training for the staff of control bodies, participation in trade fairs, the printing of the Yearbook on Organic Farming[16] and other promotional materials, and the collection of organic farming data for Eurostat. Support is also available to NGOs (Bioinstitut, PRO-BIO Association, PRO-BIO League) and the Czech Technology Platform for Organic Agriculture.

RESEARCH & ADVICE

Research on organic farming is provided in fragmentary form by several research institutions, universities and NGOs. There is no research institution with a focus purely on organic farming. To improve coordination in research, the Czech Technology Platform for Organic Agriculture was established at the end of 2009. The Institute of Agricultural Economics and Information (IAEI) is the institution responsible for organic farming data collection for the Ministry of Agriculture and for Eurostat.

Advisory services for organic farms are carried out by professional organisations (PRO-BIO Association and its regional centres, EPOS Association of Consultants in organic farming, Bioinstitut, etc.) and by private (accredited and non-accredited) advisors. The accredited advisors are listed in the Ministry of Agriculture's register of consultants, and since 2007 the cost of seeking their agricultural advice has been reimbursable under measure 114 (Use of advisory services) of the Rural Development Programme. In 2011, there were 30 advisors accredited as organic farming consultants (of a total of 211 agricultural advisors), but only 10 of these are involved in organic farming full-time.

CHALLENGES & OUTLOOK

One of the key challenges is the need to increase organic production and improve the availability of Czech organic processed foodstuffs. The low levels of production have been criticised, as organic farmland already makes up a large share of total agricultural land, and considerable subsidies are spent on organic farming.

FURTHER INFORMATION

- Organic Eprints for the Czech Republic: www.orgprints.org/view/projects/cz-czech-republic.html
- Institute of Agricultural Economics and Information (IAEI), provides information related to agriculture and organic farming: www.agronavigator.cz/ekozem
- Green Marketing: www.bio-info.cz
- MZe ČR, the Ministry of Agriculture, organic farming pages: www.eagri.cz/public/web/mze/zemedelstvi/ekologicke-zemedelstvi

For other relevant websites, see the section on key sector institutions.

DENMARK

Tomas Fibiger Norfelt[17]

KEY INDICATORS 2012[18]

Area	Organic agricultural area	182 930 hectares
	Share of total agricultural area	6.9 %
	Change 2002 to 2012	+4.9 %
	Change 2011 to 2012	12.8 %
Operators	Organic producers	2 677 (2011)
	Organic processors	517
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 887 million
	Share of total market	7.6 %
	Per capita consumption	EUR 159
	Change in retail sales 2011 to 2012	0.5 %
	Organic exports (2011)	EUR 139.3 million
	Organic imports (2011)	EUR 195.7 million

HIGHLIGHTS FOR 2013

- Aarhus, the country's second largest city, receives subsidies to help it increase the amount of organic food used in catering for municipal institutions to 60 % by 2020
- The government expects to allocate approximately EUR 107 million (DKK 800 million)[19] for measures under its Finance Act to protect the environment, climate and nature. The Danish Agriculture & Food Council criticizes the Finance Act for not doing enough to promote organic farming
- A forecast shows that organic dairy farmers will earn an operating profit of approximately EUR 0.13 million (DKK 1 million) in 2013 and 2014
- The new Minister of Agriculture, Karen Hækkerup, says she will maintain an active organic farming policy in order to strengthen Denmark›s position as the leading country in ecology.
- A new campaign is launched to increase consumer awareness of organic pork

HISTORY OF ORGANIC FARMING

- 1987: The Danish Parliament adopts the world's first comprehensive legislation on organic farming
- 1993: The largest Danish supermarket chain, Coop Denmark, reduces its prices for a wide range of organic products by 15 to 20 %. General support for organic farming is introduced
- 1996: The 7th Scientific and Technical Conference of the International Federation of Organic Agriculture Movements (IFOAM) is held in Denmark
- 2008: The International Centre for Research in Organic Food Systems (ICROFS) is founded as an expansion of the former Danish Agricultural Research Centre for Organic Farming (DARCOF)

KEY SECTOR INSTITUTIONS

- Organic Denmark: www.okologi.dk
- Danish Knowledge Centre for Agriculture (DAAS): www.vfl.dk/english
- ICROFS, International Centre for Research in Organic Food Systems (ICROFS): www.icrofs.org
- Danish Agriculture & Food Council: www.agricultureandfood.dk
- Organic Food Council: 2.naturerhverv.fvm.dk/raad_og_udvalg.aspx?ID=7950

PRODUCTION BASE: LAND USE AND KEY CROPS

- Of the total area of 182 930 hectares (2012), 13 % consists of grassland/grazing areas, 86 % arable land and 1 % permanent crops. The key arable crops are green fodder from arable land (90 000 hectares), cereals (60 700 hectares), seeds (4 000 hectares), and vegetables (1 900 hectares). The key permanent crops are fruit (600 hectares), energy crops (willow, poplar, etc.) (700 hectares), and Christmas trees (300 hectares).

STANDARDS, LEGISLATION, ORGANIC LOGO

The state certification and inspection in Denmark adheres to EU legislation on organic farming and other regulations. The Danish law on organic farming sets out the rules for the certification procedure and for the few areas that are not covered by the EU legislation, such as rearing chickens for egg production.[20]

The Danish state-owned Ø label was launched in 1990. The logo is familiar to 98 % of all Danish consumers.

POLICY SUPPORT

National action plan: The Action Plan for Organic Production towards 2020, launched in June 2012, is intended to achieve the government's objective of doubling the area used for organic farming in Denmark by 2020. The government aims to effect a green transition of Danish agriculture, and it considers organic production as a cornerstone of this conversion. Key targets are the organic conversion of public kitchens (approximately EUR 7.5 million in 2012-2013; DKK 56 million), conversion of public land, the introduction of a number of new organic products (approximately EUR 5.36 million in 2012-2014; DKK 40 million), better focused and coordinated export activities (approximately EUR 2.68 million in 2012-2013; DKK 20 million), and targeted support for organic farms (approximately EUR 10.7 million in 2012-2013; DKK 80 million).[21]

Support under the EU rural development programme: Subsidies to convert to organic farming, amount to EUR 140 (DKK 1 050) per hectare annually, during the conversion period. An additional EUR 13 (DKK 100) per hectare annually will also be provided over the three subsequent years, during the first 5-year commitment period.

Other policy support: Farmers can apply for direct payments in support of extensive or environmentally friendly farming practices of EUR 110 per hectare. In addition to the financial support for organic farmers, the Danish government also discourages conventional farming by levying high taxes on products such as fertilisers and pesticides. Funding is provided to the International Centre for Research in Organic Food Systems (ICROFS), for investments in new technologies and for the development of new products.

RESEARCH & ADVICE

ICROFS calls itself a *centre without walls*, where scientists remain in their own locations while working across institutions. Its activities are coordinated by a secretariat at the Research Centre Foulum, Aarhus University. Since 1996 three major organic research programmes have been launched DARCOF I, II and III.

The Danish Agricultural Advisory Service is Denmark's oldest and largest organic extension service. Run by the farmers' union, the Danish Agriculture & Food Council, it operates on two levels. Regionally, about 30 agricultural centres provide advice to farmers, while the experts working at the central Knowledge Centre for Agriculture coordinate the development of the advisory services.

CHALLENGES & OUTLOOK

Consumers, politicians, companies and farmers are all looking for ways to secure sustainable development in Denmark. Organic farming plays a vital role in this. The challenges facing the stakeholders include the need to maintain the integrity and the quality of the organic products, while further developing organic farming and informing consumers about organic products. The political establishment must maintain its focus on organic farming as an effective environmental tool and not just a market opportunity, and conventional processors must become involved in the processing and promotion of organic products, both in Denmark and abroad.

FURTHER INFORMATION

- Organic Eprints for Denmark: www.orgprints.org/view/projects/1darcof.html
- Denmark's biggest agriculture website, providing more than 100 000 articles on agricultural practice: www.landbrugsinfo.dk

For other relevant websites, see the section on key sector institutions

ESTONIA

Merit Mikk[22]

KEY INDICATORS 2012[23]

Area	Organic agricultural area	144 149 hectares
	Share of total agricultural area	15.3 %
	Change 2002 to 2012	+370 %
	Change 2011 to 2012	+8 %
Operators	Organic producers	1 478
	Organic processors	64
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	Estimated value EUR 20 million (2011)
	Share of total market	1.6 % (all organic products, 2011); 0.47 % (Estonian organic products, 2011)
	Per capita consumption	Approx. EUR 15
	Change in retail sales 2011 to 2012	No precise data for all organic food; 39 % increase in Estonian organic food sales (2010 to 2011).
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- The new Organic Action Plan 2014-2020 is in preparation
- The first organic farmers' cooperative *Eesti Mahe* is 10 years old

HISTORY OF ORGANIC FARMING

- 1989: Foundation of the Estonian Biodynamic Association
- 1997: First Estonian Organic Farming Act
- 2006: Foundation of the Estonian Organic Farming Platform (uniting all the active organic farming organisations)
- 2007: First Estonian Organic Farming Action Plan

KEY SECTOR INSTITUTIONS

- Estonian Organic Farming Platform (EOFP)
- Estonian Organic Farming Foundation (EOFF): www.maheklubi.ee
- Farmers' Cooperative *Eesti Mahe* (Estonian Organic): www.eestimahe.ee
- Centre for Organic Farming of the University of the Life Sciences: www.mahekeskus.emu.ee
- Centre for Ecological Engineering (CEET)

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total agricultural area, 54 % consists of permanent grassland and grazing areas (78 453 hectares), 44 % is arable land (63 933 hectares), and 1 % is used for permanent crops. The key arable crops are temporary grasslands (31 415 hectares), cereals (23 626 hectares) and oilseeds (3 065 hectares). The key permanent crops are berries (1055 hectares), fruits (507 hectares) and medicinal and aromatic plants (not separated by arable and permanent crops, in total 51 hectares). In addition to the agricultural land, there are almost 130 000 hectares of wild collection areas.

MARKET

The development of organic processing and marketing has not kept up with developments at the farm level. The main obstacle to sales of locally produced organic food is that processing is under-developed (small number of processors and small production amounts). Therefore a lot of organic raw produce (mostly from animal husbandry) are sold as conventional. However, in 2012 strong growth was also recorded in these areas.

Market channels: No official data on market channels exist. Considerable amounts of organic food are sold through specialist organic and health-food shops (more than 40 shops). Direct marketing also has a notable share, but its importance is decreasing. The biggest increase in sales over the past two years is likely to have occurred in conventional stores and supermarkets. Some new marketing channels have appeared (e.g. fresh milk vending machines in supermarkets).

Exports and imports: Data on exports and imports are not publicly available. It is estimated that around 70 – 75 % of organic products sold are imported. These are mostly processed products, but also include some vegetables and fruits. Some milk and meat products are imported. A limited number of products are exported. Those sold in the largest quantities are cereals (mostly through the organic farmers' cooperative *Wiru Vili*) and meat. Exported amounts are growing every year.

STANDARDS, LEGISLATION, ORGANIC LOGO

Estonia applies EU legislation on organic farming and other regulations and is implemented at the national level by the Estonian Organic Farming Act and associated ordinances.

There is a national logo, and most of the Estonian producers use it on their products. The national logo is far better known than the EU organic logo.

POLICY SUPPORT

National action plan: The Estonian Organic Farming Action Plan 2007-2013 exists, together with a plan for its implementation (*Eesti Mahepõllumajanduse Arengukava ja selle rakendusplaan aastateks 2007-2013*). It aims to increase the competitiveness of organic farming, increase the market share of organic products, and make local organic food more easily available to consumers. No guarantees were made that all the planned measures in the action plan, or the plan for its implementation could be funded (or implemented), but the Ministry of Agriculture has allocated some money every year. Funds from the rural development programmes and other sources have also been used (often through projects initiated by organic organisations). Almost every year, the Ministry of Agriculture has financed a seminar to evaluate the implementation of the organic action plan. The preparation of the new organic action plan has started.

Support under the EU rural development programme: Organic farming support payments have been made since 2000; since 2004 (when Estonia joined the European Union) these have been part of the rural development agri-environment support. The support payments are granted for arable crops (cereals, oil and fibre crops, potatoes, fodder roots, legumes, and temporary grasslands); field vegetables, medicinal and aromatic herbs, fruits and berries; and grasslands (excluding temporary grassland) where at least 0.2 livestock units are kept per hectare. In addition, support is also available for organically kept grazing animals, poultry, pigs and rabbits, and for organic beehives.

Other policy support: State support for market development is not especially targeted at the organic sector, but organic farming organisations have been active in applying for it (e.g. to implement promotion activities, organise farmers/processors participation in local fairs, study trips for farmers to different countries).

RESEARCH & ADVICE

Only a few research projects exist in the field of organic farming. Most of them are conducted by the Jõgeva Plant Breeding Institute, the Agricultural Research Centre and the Estonian University of Life Sciences.

A specialised organic farming advisory system does not exist in Estonia. Advisors are mostly self-employed and connected to the county-level advisory services. There are no advisors specialising purely in organic farming. Organic farmers are offered courses of basic and further training, which meet the requirements of the Ministry of Agriculture and are financed through the rural development programmes. In addition to these courses, other financial resources are available for the organisation of training.

CHALLENGES & OUTLOOK

The Estonian organic sector needs to develop organic food processing and boost the domestic organic food supply. Consumers' interest in organic food has increased considerably, and the organic market has shown quite rapid development in both 2012 and 2013. Interest is also increasing in the catering sector (e.g. estaurants, kindergartens, schools).

FURTHER INFORMATION

- Organic Eprints for Estonia: www.orgprints.org/view/projects/estonia.html
- Ministry of Agriculture, with an organic section and links to legislation, a wide variety of published information materials and reports: www.agri.ee/mahepollumajandus

For other relevant websites, see the section on key sector institutions.

FINLAND

Sampsa Heinonen[24]

KEY INDICATORS 2012[25]

Area	Organic agricultural area	197 751 hectares[26]
	Share of total agricultural area	8.7 % (2012)
	Change 2002 to 2012	+20 %
	Change 2011 to 2012	+5.1 %
Operators	Organic producers	4 322
	Organic processors	352 (2011)
	Organic importers	27 (2011)
	Organic exporters	No data
Market and trade	Retail sales	EUR 202 million
	Share of total market	Slightly less than 2 %
	Per capita consumption	EUR 37.4
	Change in retail sales 2011 to 2012	24 %
	Organic exports	EUR 14 million (2009)
	Organic imports	No data

HIGHLIGHT FOR 2013

In May 2013, the Finnish Government launched a programme aiming to make 20 % of the cultivated area organic by 2020.

HISTORY OF ORGANIC FARMING

- 1918: First documented, intentional farm conversion to organic production (natural agriculture)
- 1927: First biodynamic farm
- 1946: The Finnish Bio-dynamic Society is founded
- 1930s: Artturi Virtanen develops the AIV-System, a cultivation method which includes crop rotation with intensive red clover leys and pastures and bread grains.
- 1985: Finnish Association for Organic Farming Luomuliitto is founded
- 1990: State programme for financial support for conversion to organic is launched
- 1995 Finland becomes a member of the EU, and many farms convert to organic farming
- 2011: Founding of Pro Luomu, an association for the marketing of organic products
- 2013: The Organic Production Development Programme is launched

KEY SECTOR INSTITUTIONS

- Evira, Finnish Food Safety Authority: www.evira.fi
- Finnish Association for Organic Farming Luomuliitto: www.luomuliitto.fi/in-english/
- Finnish Biodynamic Association: www.biodyn.fi
- Organic Food Finland, export and trade in organic products: www.organic-finland.com
- Pro Luomu, marketing support and promotion: www.proluomu.fi

PRODUCTION BASE: LAND USE AND KEY CROPS

70 % of the agricultural land (2011) is used for arable crops (131 000 hectares); 1.9 % is permanent grassland and grazing areas (3 600 hectares), and 0.3 % is permanent crops (560 hectares). The main arable crops are green fodder from arable land (79 500 hectares), followed by cereals (39 143 hectares), and protein crops (8 145 hectares). The main permanent crops are berries (430 hectares), followed by fruit (88 hectares). Finland has the world's largest non-agricultural organic area. There is a specialised certification system for organic wild products in Finland. In 2011, the most popular products were blueberries and lingonberries. The collection area, mostly in the northern part of Finland, covers about 7 million hectares. Organic wild berries comprise roughly 20 % of all collected wild berries in Finland.

MARKET

The organic market has developed rapidly in recent years, after having lagged behind the rest of Western Europe. The market grew by 46 % in 2011 and 24 % in 2012. According to Pro Luomu, the value of the Finnish organic market was EUR 202 million in 2012. Nevertheless, the overall market share of organic food in Finland is slightly lower than 2 %.

Top-selling products: The market share varies greatly between product categories. The highest market shares have been reached for eggs and vegetable oils. Market shares with over 3 % have been reached for root vegetables, tea, fresh milk, flour, flakes, ketchup, and soya sauces. Based on value, the most important organic product in retail sales is fresh milk.

Market channels: According to the Nielsen Company, 82 % of the organic products were sold in mainstream retail channels in 2012. This leaves 18 % to other types of outlets: speciality stores, open markets, direct sales etc. While this is a small part of the total sales, it is proportionately far higher than for overall food sales and underlines the importance of the alternative marketing channels in the organic sector.

Exports and imports: Organic product exports were estimated to be EUR 14 million in 2009. This represented 1 % of Finnish food exports. The most important Finnish export products originate from the grain sector (oats and oat flakes, wheat flour and bread). There are no statistics on organic imports, but it can be estimated that the share of imported products on the Finnish organic market is around 30 %. This includes raw-material imports and products imported as ready retail packed products.

STANDARDS, LEGISLATION, ORGANIC LOGO

A nationwide inspection system for organic production was first established by Luomuliitto in 1986. In July 1994, the responsibility for organising the inspection of organic plant production was given to the Ministry of Agriculture and Forestry. Presently, the EU legislation on organic farming is implemented by Statue No 846/2008, while the control system is entirely based on designated public inspection authorities.

The national label *Luomu – Valvottua tuotantoa /Kontrollerad ekoproduktion* (Certified Organic Production) is granted by Evira to operators whose production has been controlled by the Finnish public inspection authorities.

POLICY SUPPORT

National action plan: The Organic Production Development Programme, launched by the Finnish Government in May 2013, aims to get at least 20 % of the cultivated area farmed organically by the 2020. This goal has already been surpassed in the provinces of Åland, Kainuu and North Karelia.

Support under the EU rural development programme: Organic farmers in Finland receive support through different rural development measures.

Other policy support: Organic agriculture was one of the examples of the sub-tasks assigned by the Country Brand Delegation, appointed by the Minister for Foreign Affairs in 2010. The delegation proposed that the emphasis of Finnish agriculture should increasingly be shifted to organic production. The goal is for organic production to account for at least one half of overall production by 2030. Launched in 2013, the Finnish Organic Research Institute is one of the concrete results of the process.

RESEARCH & ADVICE

Research projects are carried out in a number of research units of the state research station MTT, the Agrifood Research Center, and, most notably, in the research centre of Mikkeli, in south-eastern Finland. Research into organic production focuses on the nutrient economy, production techniques and local food systems. The Finnish Organic Research Institute was launched in 2013. It is a multidisciplinary research organisation founded by University of Helsinki and the Agrifood Research Center MTT. The main idea of the institute is to support the whole food chain and promote organic food production in Finland through research, science communication, education, and development projects. The fields of research cover the whole food chain.

The advisory service for organic farming is coordinated and developed by the Association of Rural Advisory Centres. Practical advisory work is carried out by 16 regional advisory centres, which have about 50 advisors specialised in organic farming, usually in plant production. In addition to the Rural Advisory Centres, *Luomuliitto* and the Finnish Biodynamic Association provide advisory services for organic farming.

CHALLENGES & OUTLOOK

At present, the Finnish organic sector enjoys a favourable climate in terms of market conditions and the public attitude to organic products. Even the farmers see organic production as a viable option for the new European rural development programming period, starting in 2014. The rising cost of artificial fertilisers and animal feeds are an additional factor encouraging farmers to consider converting to organic production.

FURTHER INFORMATION

- Organic Eprints for Finland: www.orgprints.org/view/projects/fi.html
- Magazine of the Union of Organic Farming: www.luomuliitto.fi/luomulehti/Luomulehti
- News about organic production in Finland: www.luomu.fi
- Ministry of Agriculture and Forestry, Organic production statistics: www.maataloustilastot.fi/en/organic-production-statistics
- Information about Finnish companies exporting organic food: www.foodfromfinland.com/products/company_listing/organic

For other relevant websites, see the section on key sector institutions.

FRANCE

Elisabeth Mercier[27]

KEY INDICATORS 2012[28]

Area	Organic agricultural area	1 032 941 hectares
	Change 2002 to 2012	+99.4 %
	Change 2011 to 2012	+6 %
	Share of total agricultural area	3.8 %
Operators	Organic producers	24 425
	Organic processors	8 785
	Organic retailers	3 556
	Organic importers	179
	Organic exporters	No data
Market and trade	Retail sales	EUR 4 173 million;
	EUR 4 004 million without collective catering	Slightly less than 2 %
	Share of total market	2.4 %
	Per capita consumption	EUR 61
	Change in retail sales 2011 to 2012	+6.6 %
	Organic exports	EUR 309 million (wholesale stage)
	Organic imports	EUR 670 million (wholesale stage)

HIGHLIGHTS FOR 2013 & 2014

- New action plan for the development of organic farming: *Ambition Bio 2017*
- *Printemps BIO*, an annual event in the first two weeks of June. *Printemps BIO* is a national programme to inform about, and raise awareness of organic farming and organic products
- The international seminar on organic farming will take place on 27 February 2014

HISTORY OF ORGANIC FARMING

- 1930s to 1970s: Some pioneers are active, more and more organisations are created, promoting organic farming (among farmers, medical doctors, and consumers)
- 1959: The agronomist Jean Boucher and the grain dealer Raoul Lemaire develop the Lemaire-Boucher method, which uses a kind of seaweed, lithothamne, to fertilise soil. The first group of organic farmers is founded (GAB)
- 1964: Creation of *Nature & Progrès*
- 1972: Foundation of the International Federation of Organic Agriculture Movements (IFOAM) in Versailles

- 1976: Foundation of SYNABIO, the National Union of Organic Companies serving the organic farming sector
- 1978: Creation of FNAB, the National Federation of Organic Farming
- 1980: First recognition of *agriculture without synthetic chemicals and fertilisers* in a law
- 1982: Creation of ITAB, the Technical Institute of Organic Farming
- 1985: Creation of the Agriculture Biologique (AB) mark, the logo for organic products
- 1998: *Plan Riquois*, the first multi-year plan for the development of organic farming
- 2001: Creation of Agence BIO, the French Agency for Development and Promotion of Organic Farming
- 2008-2012 : Plan to develop organic farming by 2012 launched
- 2013-2017: Action plan, *Plan Ambition Bio 2017*

KEY SECTOR INSTITUTIONS

- FNAB, the National Federation of Organic Farming: www.fnab.org
- Synabio, the National Union of Organic Companies serving the organic farming sector: www.synabio.com
- APCA, the Permanent Assembly of Agricultural Chambers: www.chambres-agriculture.fr
- Coop de France, the Federation of Agricultural Cooperatives: www.coopdefrance.coop
- ITAB, the Technical Institute of Organic Farming: www.itab.asso.fr
- *Agence* BIO, French Agency for Development and Promotion of Organic Farming www.agencebio.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total 1 032 941 hectares of organic agricultural land (2012), 36.8 % consists of permanent grassland and grazing areas, 48.6 % arable land, 8.7 % permanent crops, 0.5 % aromatic and medicinal plants (annual and permanent), and 5.4 % other uses. The key arable crops are green fodder from arable land (281 930 hectares), cereals (133 195 hectares), and oilseeds (27 098 hectares). The key permanent crops are grapes (64 801 hectares) and fruits (20 000 hectares).

MARKET

The organic market more than doubled between 2007 and 2012.

Top-selling products: Dry grocery products, canned fruit and vegetables, and oils (21.2 % of the organic market, EUR 848 million), milk, dairy products and eggs (20.5 %, EUR 822 million), and fruit and vegetables (16.5 %, EUR 661 million).

Market channels: General retailers (45.6 %), specialised organic retailers (34.1 %), small shops, such as bakeries and butchers (4.4 %), direct sales (11.8 %), catering (4.0 %).

Exports and imports: Wine, selected categories of fruit and vegetables (cabbages, apricots, salads, nuts), and high value products (french specialties and delicatessen).

The main imported products are exotic goods (coffee, cocoa, bananas), citrus fruits, durum wheat, rice, oilseeds (especially soya), protein crops, a complementary range of fruit & vegetables (tomatoes, onions), and grocery products.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply. There are also special French specifications for rabbits, snails, ostriches, pet food and restaurants.

There is a French logo, the AB mark, which is owned by the French Ministry of Agriculture which is used according to the AB mark rules.

POLICY SUPPORT

National action plan: The action plan *Ambition Bio 2017* has the general goals of doubling the proportion of land farmed organically by the end of 2017, and promoting consumption of organic products. There are six main areas of activity: developing production; strengthening the organic food chain; developing domestic consumption and exports; strengthening research and the dissemination of results; training actors in the organic food chain; and adapting regulations.

Support under the EU rural development programme: Compensatory payments are available for the conversion and maintenance of organic farms.

Further policy support is given for the promotion of organic farming, food chain development, and research and extension services.

RESEARCH & ADVICE

The coordination of research on organic farming is carried out by the Technical Institute of Organic Farming (ITAB) and the French Agronomic Research Institute (INRA).

Advice is provided by several organisations.

CHALLENGES & OUTLOOK

Current challenges include the need to ensure solid development, with a good balance between supply and demand, the need to increase the supply of oilseeds and protein crops, and the need on the part of consumers and the food sector for more information, and for related promotional activities.

FURTHER INFORMATION

- Organic Eprints for France: www.orgprints.org/view/projects/fr.html
- Ministry of Agriculture: www.agriculture.gouv.fr
- Ministry of the Environment: www.development-durable.gouv.fr

For other relevant websites, see the section on key sector institutions.

GERMANY

Diana Schaack[29] and Helga Willer[30]

KEY INDICATORS 2012[31]

Area	Organic agricultural area	1 034 355 hectares
	Share of total agricultural area	6.2 %
	Change 2002 to 2012	+48 %
	Change 2011 to 2012	+1.8 %
Operators	Organic producers	23 032
	Organic processors	8 293
	Organic importers	309
	Organic exporters	No data
Market and trade	Retail sales	EUR 7.04 billion
	Share of total market	3.7 %
	Per capita consumption	EUR 86
	Change in retail sales 2011 to 2012	+6.3 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- The organic agriculture trainee programme celebrates its 10th anniversary
- 12th scientific conference held in March 2013
- Organic retail sales exceed EUR 7 billion

HISTORY OF ORGANIC FARMING

- 1924: Rudolf Steiner gives eight talks on the spiritual foundation of agriculture, later called bio-dynamic agriculture, at the Koberwitz estate near Breslau in Silesia (today Wroclaw in Poland)
- 1950s: Hans Müller of Switzerland develops the organic-biological farming method, the theoretical basis of which is provided by the German medical doctor and microbiologist Hans-Peter Rusch
- 1961: Foundation Ecology & Agriculture is established
- 1971: Bioland is founded, Germany's largest organic producer organisation
- 1988: The working group on organic agriculture (AGÖL) is founded as an umbrella organisation; AGÖL ceased its activities in 2002
- 1989: Support for organic farmers through the so-called extensification programme
- 1991: First scientific conference of the German-speaking countries takes place
- 2002: Federal organic farming scheme is launched
- 2002: German Federation of the Organic Food Industry (BÖLW) is founded

KEY SECTOR INSTITUTIONS

- Association of Organic Processors, Wholesalers and Retailers (BNN): www.n-bnn.de
- Federation of the Organic Food Industry (BÖLW) and its member associations: www.boelw.de
- Foundation Ecology & Agriculture (SÖL): www.soel.de
- Research Institute of Organic Agriculture Germany (FiBL): www.fibl.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the 1 034 355 hectares of organic agricultural land, 55.8 % consists of permanent grassland and grazing areas, 41.57 % is arable land, and 1.6 % is used for permanent crops. The key arable crops are cereals (202 000 hectares), followed by green fodder from arable land (153 000 hectares), and protein crops (22 200 hectares). The key permanent crops are grapes (7 400 hectares), temperate fruit (6 800 hectares), and berries 1 546 hectares).

MARKET

The share of organic food sales in the total turnover for food products in Germany increased from EUR 1.48 billion in 1997 to approximately EUR 7.04 billion in 2012 (excluding restaurants and catering). This accounted for 3.7 % of the food market. Experts believe that organic farming still has considerable growth potential.

Top-selling products: Vegetables, including potatoes (EUR 561.7 million, 8.2 % of the total market); bread and bakery products (EUR 459.3 million, 5.9 % of the total market);and fruit (EUR 389.2, 6.5 % of the total arket).[32]

Market channels: Approximately 50 % of organic products are sold through general retailers, 31.4 % through organic retailers and 18.5 % through other channels.

Exports and imports: Germany is not only the largest market for organic products in Europe, but also one of its largest organic producers. However in 2009/10 organic imports accounted for between 2 % and 95 % – depending on the product – all of which could have been produced domestically.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Organic Farming Act (ÖLG) pools specific executive functions in German organic farming, and has stricter requirements than EU legislation on organic farming. The Organic Farming Act was promulgated in the Federal Law Gazette on 15 July 2002.

Germany has its own organic logo, the *Biosiegel,* www.biosiegel.de.

POLICY SUPPORT

National action plan: In 2002, the Federal Organic Farming Scheme was set up to improve research and the general conditions for organic farming. The scheme was extended to include other forms of sustainable agriculture under a resolution adopted by the German Parliament on 26 November 2010. EUR 34.8 million were made available for the scheme in 2002, approximately EUR 36 million in 2003, EUR 20 million annually from 2004 to 2006, and EUR 16 million from 2007 to 2012. In 2013, EUR 17 million was made available. The programme's financial resources are to be maintained at this level in the medium term. However, since 2011 the scheme has been also open to other forms of sustainable agriculture.

Support under EU rural development programmes: Germany has used public funds to promote the introduction of organic farming since 1989. Since 1994, the federal states have carried out agri-environmental programmes to support the introduction and maintenance of organic farming.

RESEARCH & ADVICE

In 1981, the first chair in organic agriculture worldwide was established at the University of Kassel-Witzenhausen. Research also takes place at other universities, at state research stations and in private research institutes. A state research institute for organic agriculture was established in December 2000 in Trenthorst in Schleswig-Holstein, under the auspices of the *Johann Heinrich von Thünen Institute*, the federal agricultural research station. Every two years, a scientific conference takes place in the German-speaking countries, www.wissenschaftstagung.de, organised by a different university institute in cooperation with the Foundation Ecology & Agriculture (SÖL), the initiator of the conference in 1991.

There are several forms of organic advisory services: those provided by the producer associations and chambers of agriculture; the partly state-funded *Ringberatung*, in which a number of producers collectively hire an advisor; and the official advisory service. Training is available for advisors as part of the Federal Scheme for Organic Farming and Other Forms of Sustainable Agriculture.

CHALLENGES & OUTLOOK

One of the main challenges is the failure of supply to keep up with the continually growing demand for organic food. A large proportion of the organic products consumed are imported, although they could also be produced in the country.

FURTHER INFORMATION

- Organic Eprints for Germany: www.orgprints.org/view/projects/de.html
- Ministry of Agriculture, Food and Consumer Protection, organic farming pages: www.bmelv.de/SharedDocs/Standardartikel/EN/Agriculture/OrganicFarming/OrganicFarmingInGermany.html
- Office of the Federal Organic Farming Scheme and other Forms of Sustainable Agriculture: www.bundesprogramm-oekolandbau.de
- German information portal on organic agriculture: www.oekolandbau.de
- Organic market-related information: www.organic-market.info and www.bio-markt.info
- Agricultural Market Information (AMI) company: www.ami-informiert.com

For other relevant websites, see the section on key sector institutions and research & advice.

GREECE

Nicolette van der Smissen[33]

KEY INDICATORS 2012[34]

Area	Organic agricultural area	462 618 hectares
	Share of total agricultural area	5.6 %
	Change 2002 to 2012	+500 %
	Change 2011 to 2012	+117 %
Operators	Organic producers	23 433
	Organic processors	1 551
	Organic importers	4
	Organic exporters	No data
Market and trade	Retail sales	Approximately EUR 60 million in 2010, but since then the organic market has seen substantial decline.
	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2013

2013 marks 20 years since the official start of organic farming in Greece.

HISTORY OF ORGANIC FARMING

- 1980s: Production of organic olive oil and raisins for export
- 1993: EU Regulation (EEC) No 2092/91 comes into force
- 2004 to 2006: Increase in organic area due to support from the EU
- 2011: Fall in organic area and the organic market, due to the financial crisis and delays in compensatory payments for organic farming

KEY SECTOR INSTITUTIONS

- Organic Farmers Markets: www.bioagores.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic area of 462 618 hectares, 60 % consists of permanent grassland and grazing areas, 15.5 % permanent crops, 21.8 % arable land and 2.7 % other agricultural land. The key arable crops are cereals (51 544 hectares), green fodder from arable land, including temporary grasses and grazing areas (36 859 hectares), and protein crops (3 727 hectares). The key permanent crops are olives (62 702 hectares), grapes (4 997 hectares) and citrus fruit (1 521 hectares).

MARKET

The domestic market for organic products was estimated to be around EUR 60 million (2010). The market for organic products was developing slowly until 2010, when growth was halted by the economic crisis. Between 2011 and 2013, consumption of organic products fell by almost half.

Market channels: Supermarkets and specialised organic shops covering about 40 to 50 % of the market each. Further channels are farmers' markets and other points of sale.

Exports and imports: About one third of the organic products sold are Greek. Most of the processed products are imported. Key products for the growing export market are olive products, wine and to some extent fresh fruit, vegetables and feta cheese. No data are available on import and export volumes.

STANDARDS, LEGISLATION, ORGANIC LOGO

Greek organic production is certified according to EU legislation on organic farming and other regulations, which is fully implemented; some farmers have an additional certification (Demeter). Some products, usually those which are to be exported, are certified according to the private standards of other countries (e.g. Germany, Switzerland and USA).

There is no national logo. In most cases, the logos of the Greek inspection and certification bodies are used alongside the EU organic logo.

POLICY SUPPORT

National action plans: There is no national action plan.

Support under the EU rural development programme: The agri-environmental programme (Γεωργοπεριβαλλοντικές Ενισχύσεις, Μέτρο 2.1.4) was to be implemented from 2009 until 2014 (five-year cycle). It opened for applications in April 2012. However, these have not yet been evaluated (August 2013).

Other policy support: Another EU-funded programme to improve food quality (implemented since 2009 on a five-year cycle) is intended to cover inspection and extension costs. Due to delays, no payments have been made up to now.

RESEARCH & ADVICE

There is no organised organic research or advisory service. Activities are carried out and supported by individuals or non-governmental organisations (e.g. university professors, control and inspection bodies, farmers' groups).

CHALLENGES & OUTLOOK

The main need of the organic sector during a period of low economic potential, is for support through appropriate policy decisions and planning to sustain a basis on which it can develop again once the crisis is over.

FURTHER INFORMATION

- Organic Eprints for Greece: www.orgprints.org/view/projects/greece.html
- Ministry of Rural Development and Food: www.minagric.gr
- Agricultural Products Certification and Supervision Organisation (Agrocert): www.agrocert.gr
- Other control and certification bodies: www.dionet.gr, www.physiologike.gr, www.bio-hellas.gr, www.qways.gr, www.a-cert.org, www.irisbio.gr, www.greencontrol.gr, www.bio-geolab.gr, www.gmcert.gr, www.qmscert.gr, www.tuv-nord.com

For other relevant websites, see the section on key sector institutions.

HUNGARY

Zoltán Dezsény[35] and Dóra Drexler[36]

KEY INDICATORS 2012[37]

Area	Organic agricultural area	130 609 hectares[38]
	Share of total agricultural area	3.1 %
	Change 2002 to 2012	25.9 %
	Change 2011 to 2012	5 %
Operators	Organic producers	1 560
	Organic processors	414
	Organic importers	14
	Organic exporters	No data
Market and trade	Retail sales	EUR 25 million (2009)
	Share of total market	0.3 % (2009)
	Per capita consumption	EUR 2.5 (2009)
	Change in retail sales 2011 to 2012	No data
	Organic exports	EUR 20 million (2009)
	Organic imports	EUR 18 million (2009)

HIGHLIGHTS FOR 2013

- The Hungarian Biokultúra Alliance, organic advocacy organisation celebrates its 30th anniversary in 2013
- In October 2013, the 4th International Conference on Organic Agriculture Sciences (ICOAS) and the Organic Policy Summit took place in Budapest

HISTORY OF ORGANIC FARMING

- 1983: *Biokultúra Klub* is established
- 1990s: Hungary is included in the third country list under EU Regulation (EEC) No 2092/91
- 1992: Kishantos Rural Development Centre established
- 1996: The inspection body Biokontroll Hungária is founded
- 2002: The Ministry of Agriculture and Rural Development approves the inspection and certifying body Hungária Öko Garancia
- 2011: The Hungarian Research Institute of Organic Agriculture (ÖMKi) is founded

KEY SECTOR INSTITUTIONS

- Biokontroll and Hungária Öko Garancia, the two Hungarian inspection bodies: www.biokontroll.hu and www.okogarancia.hu
- Biokultúra Alliance, advocacy for organic agriculture, regional associations: www.biokultura.org
- KÖSZ, Organic Farmers' Association in the Carpathian Basin: www.karpatbio.hu
- Kishantos Rural Development Centre: www.kishantos.hu
- ÖMKi, the Hungarian Research Institute of Organic Agriculture: www.biokutatas.hu (HU), www.omki.org (EN)
- MÖSZ, Association of Hungarian Organic Farmers: www.hunorgfarm.hu

PRODUCTION BASE: LAND USE AND KEY CROPS

In 2011, of the total organic area of 130 609 hectares, 52.3 % consists of permanent grassland and grazing land, 39.2 % arable land, 4 % permanent cropland and other agricultural land. The key arable crops are cereals (23 112 hectares), green fodder from arable land including temporary grasses and grazing areas (15 652 hectares), oilseeds (7 438 hectares), and vegetables (1 770 hectares). The key permanent crops are orchards (apples, cherries, plums, 1 793 hectares), nuts (1 440 hectares), grapes (1 207 hectares), and berries (796 hectares).

MARKET

Organic products in Hungary have only a small market share (less than 1 %).

Exports and imports: About 85 % of the organic production is exported. Most of the products leave the country as raw materials or as products with low added-value. Most of the (modest) organic assortments in Hungarian food stores are imported processed products. Some estimates suggest that 90 % of domestic organic consumption is made up of imports.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations are implemented, and the decree on organic certification, production and distribution and labelling applies (*A vidékfejlesztési miniszter 34/2013. (V.14.) VM rendelete a mezőgazdasági termékek* és élelmiszerek ökológiai *gazdálkodási követelmények szerinti tanúsításáról, előállításáról, forgalmazásáról, jelöléséről* és *ellenőrzésének eljárásrendjéről*).

There is no national logo for organic products. The inspection bodies have their own logos.

POLICY SUPPORT

National action plan: A new national action is pending and is expected to be finalised in early 2014.

Support under the EU rural development programme: Compensatory payments for organic farming were granted under the Agri-Environmental Programme in the period 2009-2013 (payments for organic arable farming, organic grassland management, organic orchard management, and organic wetland management). The support levels ranged from EUR 100 – 500 per hectare.[39]

Other support: Grants for young farmers.[40]

RESEARCH & ADVICE

The main institutions conducting research on organic agriculture are the Hungarian Research Institute of Organic Agriculture (ÖMKi) and the Agricultural Universities in Hungary.

The advisory services are coordinated by the National Institute for Agricultural Advisory, Education and Rural Development (NAKVI), which provides training courses and technical information for advisors.

CHALLENGES & OUTLOOK

Hungarian organic production needs more strongly practice-oriented research. Furthermore, more dissemination work is needed, underpinned by local scientific evidence, and efforts are required to increase consumer awareness in order to establish a stable and growing organic sector. Cooperation and better communication between organic stakeholders (producers, traders, umbrella organisations, certifiers and research institutions) is crucial.

FURTHER INFORMATION

- Organic Eprints for Hungary: www.orgprints.org/view/projects/hungary.html
- Ministry of Rural Development **(***Vidékfejlesztési MInisztérium***)** www.kormany.hu/hu/videkfejlesztesi-miniszterium
- NÉBIH, National Food-chain Surveillance Office (*Nemzeti* Élelmiszerlánc-biztonsági *Hivatal*)

For other relevant websites, see the section on key sector institutions.

ICELAND

Gunnar Á Gunnarsson[41]

KEY INDICATORS 2012[42]

Area	Organic agricultural area	20 676 hectares[43]
	Share of total agricultural area	1.38 %[44]
	Change 2002 to 2012	+300 %
	Change 2011 to 2012	-0.1 %
Operators	Organic producers	35
	Organic processors	25
	Organic importers	No data
	Organic exporters	4
Market and trade	Retail sales	No data
	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- 2013: The first organic caterer, first organic coffee roaster, and the first in-conversion fish farm enter the certification scheme
- 2013: The number of certified organic sheep increases by nearly 100 %, and the amount of organic mutton entering the market doubles
- 2014: Vottunarstofan Tún will celebrate its 20th anniversary
- 2014: Tún will host the annual meeting of Nordic & Baltic control bodies for organic agricultural production

HISTORY OF ORGANIC FARMING

- 1930: Sesselja Sigmundsdóttir, a disciple of R. Steiner and anthroposophy, founds Sólheimar, the first organic farm in Iceland
- 1955: Dr Jónas Kristjánsson sets up the Organic Health Clinic and Horticulture Unit of the Nature Health Association of Iceland in Hveragerði
- 1993: VOR – Organic Farmers & Growers Association is founded
- 1994: The certification body Vottunarstofan Tún is founded
- 2011: The first organic conversion support scheme is introduced

KEY SECTOR INSTITUTIONS

- Farmers' Association of Iceland: www.bondi.is/english
- Vottunarstofan Tún ehf., Icelandic organic certification body: www.tun.is
- VOR – Organic Farmers & Growers Association: akurbisk@akurbisk.is

PRODUCTION BASE: LAND USE AND KEY CROPS

Figures for individual categories have not been assembled. However, of the total area, the largest part is used for collection of wild plants, and second in importance is permanent grassland.

MARKET

There are no data for sales volumes or values for the Icelandic organic market. The market has grown considerably over the last five years as exemplified by the ever increasing organic sections in supermarkets, a new, mostly-organic retail chain (*Lifandi markaður*), and several restaurants using organic food.

Exports and imports: No data available. A major part of the organic products sold are imported, mostly from Western Europe, but increasingly also from the United States. Seaweed meal is by far the most important organic export product.

STANDARDS, LEGISLATION, ORGANIC LOGO

Law no. 162/1993 on organic agriculture is still in force. In 2002 Iceland formally adopted EU Regulation (EEC) No 2092/91, to which it still adheres, as the European Economic Area (EEA) has not yet completed the incorporation of the new EU framework (e.g. EU Regulation No 834/2007 etc.) into the EEA agreement.

There is no official logo for organic products, but the Tún logo is used a lot.

POLICY SUPPORT

There is no official action programme in place in Iceland for the development of the organic sector. A limited conversion support scheme was introduced in 2011, but due to insufficient funding, it only applies to the few farmers who started the conversion process in that year. Some support has been provided by the authorities to develop organic courses at the agricultural college. The government also provides some support each year to Tún, for development projects.

RESEARCH & ADVICE

One of the national advisors at the National Farmers' Union specialises in advice for the organic sector. Ó. Dýrmundsson is a national adviser on organic farming: ord@bondi.is

CHALLENGES & OUTLOOK

The sector faces two main problems. One is the almost total lack of conversion support schemes (with the limited exception noted above); the other is the very low supply of domestic fresh produce, with the exception of a few vegetable products and lamb.

FURTHER INFORMATION

- Icelandic Food and Veterinary Authority (MAST): www.mast.is
- *Lifandi markadur,* health food store: www.lifandimarkadur.is/English

For other relevant websites, see the section on key sector institutions.

IRELAND

Grace Maher[45]

KEY INDICATORS 2012[46]

Area	Organic agricultural area	54 122 hectares (2011)
	Share of total agricultural area	1.3 %
	Change 2002 to 2011	+81 %
	Change 2009 to 2011	+13 %
Operators	Organic producers	1 400 (2011)
	Organic processors	204 (2011)
	Organic importers	31 (2011)
	Organic exporters	10[47]
Market and trade	Retail sales	EUR 100 million (multiple retailers only)
	Share of total market	1 %
	Per capita consumption	EUR 22.1
	Change in retail sales 2011 to 2012	No change 20011/2012
	Organic exports	EUR 69 million
	Organic imports	EUR 32 million (estimate)

HIGHLIGHTS FOR 2013

- Organic Farming Action Plan 2013-2015, launched in August 2013
- The reform of the Common Agricultural Policy is under preparation, with potential additional funding for organic production, market development and training in Ireland.
- The Irish organic market remains stable despite the recession.

HISTORY OF ORGANIC FARMING

- 1982: Irish Organic Farmers & Growers Association (IOFGA) is formed (private organic certification body)
- 1991: The certification body Organic Trust is founded
- 1994: the first financial supports are granted for organic farmers under the Rural Environment Protection Scheme
- 2007: A new dedicated Organic Farming Scheme is set up
- Late 1990s: A dedicated Organic Unit is established at the Department of Agriculture Food and the Marine

KEY SECTOR INSTITUTIONS

- IOFGA: www.iofga.org
- Organic Trust: www.organictrust.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic agricultural area of 54 122 hectares (2011), 96.2 % consists of permanent grassland and grazing areas (52 071 hectares), 3.7 % arable land (1 993.6 hectares, including 273.6 hectares of vegetables), and less than 1 % permanent crops (29 hectares).

MARKET

The organic market in Ireland has remained relatively static in the past years. The national food agency - *Bord Bia* compiles its figures using Kantar data based solely on the four major multiple retailers in Ireland. Farm-to-farm sales, direct sales and exports are not included in the EUR 100 million; therefore these figures do not represent the entire organic market in Ireland.

Top-selling products: Beef, aquaculture products, fruit and vegetables, and dairy products.

Market channels: Major multiple retailers (86 % of the market) and direct sales (14 %).

Exports and imports: Detailed information is not available. However, the main imported products are fruit and vegetables, animal feedstuffs, and shelf-stable and ambient foods. The main export products are aquaculture products and beef.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Department of Agriculture is the Competent Authority and delegates control duties to private bodies. EU legislation on organic farming and other regulations are applied, and the standards of the certifiers are used (IOFGA's Organic Food and Farming Standards in Ireland). There is no national logo, the organic logo of the EU and those of the certifiers are used.

POLICY SUPPORT

National action plan: There is an Organic Farming Action Plan 2013 to 2015. The target is to increase the certified land area to 5 % by 2020. The main objectives are to promote awareness of the potential export market and to identify issues which are impeding the growth of the organic sector.

Support under the EU rural development programme: There is a dedicated five-year Organic Farming Scheme, offering funding per hectare.

Other policy support: On and off-farm capital grant scheme.

RESEARCH & ADVICE

Agriculture Food and Rural Development Authority - *Teagasc*, the national advisory body, has two organic advisors: www.teagasc.ie

CHALLENGES & OUTLOOK

The stagnation in the supply of organic produce at national level leads to a heavy dependence on imported organic produce to meet demand. Another challenge is the lack of uptake of organic conversion due to the low level of support mechanisms under the Rural Development Programme.

FURTHER INFORMATION

- Organic Eprints for Ireland: www.orgprints.org/view/projects/Country-Ireland.html
- Department of Agriculture Food and the Marine, organic farming pages: www.agriculture.gov.ie/farmingsectors/organicfarming

For other relevant websites see the sections on key sector institutions and research & advice

ITALY

Marta Romeo[48] and Marie Reine Bteich[49]

KEY INDICATORS 2012[50]

Area	Organic agricultural area	1 167 362 hectares
	Share of total agricultural area	9.1 %
	Change 2002 to 2012	-0.07 %
	Change 2011 to 2012	+6.4 %
Operators	Organic producers	43 852
	Organic processors	9 542
	Organic importers	297
	Organic exporters	No data
Market and trade	Retail sales	EUR 1 843 million
	Share of total market	1.45 %
	Per capita consumption	EUR 30
	Change in retail sales 2011 to 2012	+ 6.7 %
	Organic exports	EUR 1 135 million in 2011
	Organic imports	No data

HIGHLIGHTS FOR 2013

- Computerised system introduced for managing a directory of certified organic operators, enabling their inclusion in the control systems and related administrative procedures
- Institutional anti-fraud measures introduced

HISTORY OF ORGANIC FARMING

- 1960s: Pioneering experiences made in organic agriculture
- 1970s: Organic agriculture begins to take off
- Mid 1980s: *Cos' è Biologico*, the National Commission for Organic Agriculture, is established.
- 1986: The first Italian Organic Agriculture Standards are published
- 1988: *AIAB* is founded. The Green Party presents the first proposal for a national law on organic agriculture
- 1990: The first International Conference of Organic Agriculture in the Mediterranean Countries, *AgriBioMediterraneo*, is held in Vignola
- 1992: *FederBio – Federazione Italiana Agricoltura Biologica e Biodinamica*, the Italian Federation of Organic and Biodynamic Agriculture is founded
- 2000: In collaboration with the Italian regions, the Ministry of Agriculture, Food and Forestry establishes SINAB, the National Information System for Organic Farming. This platform offers information and services to organic stakeholders for the development and promotion of the sector
- 2008: The 16th Organic World Congress of the International Federation of Organic Agriculture Movements (IFOAM) takes place in Modena

KEY SECTOR INSTITUTIONS

- AIAB, the Italian Association for Organic Agriculture: www.aiab.it
- CIHEAM–IAMB, Mediterranean Institute of Agronomy, research and teaching on organic farming: www.iamb.it
- CRA, Research Council: sito.entecra.it
- FEDERBIO, Italian Federation of Organic and Biodynamic Agriculture: www.federbio.it
- ISMEA, Information Services on Agricultural Markets: www.ismea.it
- SINAB, National Information System for Organic Agriculture: www.sinab.it

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic agricultural area, 45 %, (527 493 hectares), consists of arable crops, 26 % permanent crops (306 663 hectares), and 25 % is permanent grassland and grazing areas (290 700 hectares). The most important arable crops are green fodder from arable land (255 003 hectares), cereals for the production of grain (including seeds and rice, 210 543 hectares), and dried pulses and protein crops for the production of grain (20 837 hectares). The main permanent crops are olives (164 488 hectares), vineyards (57 347 hectares) and nuts (30 071 hectares).

MARKET

The Italian market has grown steadily over the past few years, with the financial crisis having no significant effect on it. It is estimated that most of the organic products consumed in the country are produced domestically.

Top-selling products: Fruit and vegetables (25 % of the organic market), dairy products (18 %), breakfast cereals and hot beverages e.g. coffee, tea (12 %) and beverages (10 %).[51]

Market channels: General retailers/supermarkets (27.4 %), specialised organic shops (44.9 %), restaurants and caterers (13.6 %), other channels (14.1 %).

Exports and imports: In 2012, 51 667 tonnes of organic products were imported from third countries. The main categories were processed products (14 321 tonnes), cereals (13 074 tonnes) and fresh and dried fruits (10 140 tonnes). Data on exports is not available.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply in Italy, but there are also additional and provisions. The competent authority is the Ministry of Agriculture, Food and Forestry (*Ministero per le Politiche Agricole, Alimentari e Forestali – MiPAAF*). Two organisations have private standards of national significance that are more restrictive than the EU Organic legislation: AIAB's Garanzia AIAB, certified by ICEA, CCPB, IMC, Bios and *QCertificazioni Codex*, and AMAB's Garanzia AMAB, certified by IMC.

In Italy the EU logo for organic products is used. There is no national logo.

POLICY SUPPORT

National action plan: The national plan for organic agriculture and organic produce (*Piano d'Azione Nazionale per l'agricoltura Biologica e i prodotti biologici*) was developed by the Ministry of Agriculture and Forestry Policies (MiPAAF) in 2005. In 2008, a national programme for the development of organic agriculture and organic produce was launched.

Support under the EU rural development programme: Direct payments and other types of support are structured in line with the CAP 2007-2013. At the national level, the National Strategy Plan (NSP) for rural development (*Piano strategico nazionale per lo sviluppo rurale*) applies. At the local/regional level, regional rural development programmes exist.

Other policy support: Special financing for research on organic agriculture at national level (*Programmi per la ricerca in agricoltura biologica*).

RESEARCH & ADVICE

Research on organic agriculture in Italy is mainly conducted by universities and national private and public research institutes. Research mainly focuses on agricultural techniques for organic systems (25 %), plant protection (19 %) and soil management and fertilisation (18 %). Less research is being done in areas of agroecology (5.8 %) and product processing and storage (4.5 %).

CHALLENGES AND OUTLOOK

Currently, the main sources for data collection on organic farming in Italy are institutions, control bodies, regions and market research companies. With the on-going computerisation it will be possible to improve data quality. The organisation of all the information in a data warehouse would improve its efficacy. This will be useful for controlling and surveillance activities, and the avoidance of fraud, especially when it comes to monitoring import activities.

FURTHER INFORMATION

- Organic Eprints for Italy: www.orgprints.org/view/projects/it.html
- Biobank, with information on organic farming, including address lists (farms, processors, farm holidays, restaurants, etc.): www.biobank.it
- Ministry of Agriculture, organic farming pages: www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/113

For other relevant websites, see the section on key sector institutions.

LATVIA

Gustavs Norkārklis[52]

KEY INDICATORS 2012[53]

Area	Organic agricultural area	195 700 hectares
	Share of total agricultural area	10.8 %
	Change 2002 to 2012	+1 515 %
	Change 2011 to 2012	+6.2 %
Operators	Organic producers	3 496
	Organic processors	138
	Organic importers	2
	Organic exporters	No data
Market and trade	Domestic market value	No data
	Share of total market	Estimated at approx. 1 %
	Per capita consumption	No data
	Increase 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS 2013 & 2014

- For 2013, only a small increase is expected in the extent of organic farmland (less than 10 000 hectares), as the lack of funding prevents newcomers from joining the organic support scheme.
- For 2014, too, just a small increase is expected, depending on when the Ministry of Agriculture is able to start with the new planning period for organic agriculture.

HISTORY OF ORGANIC FARMING

- 2004-2006: After Latvia joins the European Union there is a rapid increase in the organic area and the number of organic producers
- 2006 and forward: there is a steady increase in the organic area (10 to 15 % each year), whereas the number of farmers remains stable (around 3 500)
- 2010 and forward: the number of organic processors increases quickly (56 in 2009, 138 in 2012)

KEY SECTOR INSTITUTIONS

- ALOA, Association of Latvian Organic Agriculture: www.lbla.lv
- FVS, Food and Veterinary Service (control authority)
- Ministry of Agriculture: www.zm.gov.lv
- STC, Certification and testing centre (certification body): www.stc.lv
- Vides Kvalitāte (environmental quality; certification body): www.videskvalitate.lv

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 195 658 hectares of organic agricultural land (2012), 51.2 % consists of arable land, 45.8 % permanent grassland and grazing areas, and 0.5 % is permanent crops. The key arable crops are green fodder from arable land (62 251 hectares), cereals (30 771 hectares) and protein crops (3 299 hectares).

MARKET

Top-selling products: Milk and dairy products (yoghurt, sour cream, cottage cheese). As regards raw material for further processing, the most important products are milk, cereals, potatoes, meat, fruits and berries.

Market channels: Most of the organic products are sold directly, some through small and specialised shops.

Export and import: No data available.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and regulations applies. The organic logo *Latvijas ekoprodukts* is owned by the Association of Latvian Organic Agriculture. For non-processed products, 100% of the produce must be grown in Latvia (fruits, vegetables, etc.).

POLICY SUPPORT

National action plan: There is currently no action plan for organic agriculture. However, there is a stated goal of converting 15% of agricultural land to organic by 2015.

Support under EU rural development programmes:
Farmers in Latvia receive support under the EU's rural development programme.

FURTHER INFORMATION

- Organic Eprints for Latvia: www.orgprints.org/view/projects/lv.html

For other relevant websites, see the section on key sector institutions.

LIECHTENSTEIN

Klus Büchel[54]

KEY INDICATORS 2012[55]

Area	Organic agricultural area	1 087 hectares
	Change 2002 to 2012	+10.4 %
	Change 2011 to 2012	-0.8 %
	Share of total agricultural area	29.6 %
Operators	Organic producers	35
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 4.7 million
	Share of total market	No data
	Per capita consumption	EUR 129
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- A new website is to be launched for organic agriculture in Liechtenstein (www.bioland.li).
- Four new farms are in conversion to organic production (start 2013).

HISTORY OF ORGANIC FARMING

- 1991: Organic farming begins in Liechtenstein
- 1991: *ÖKO-BAUER* project is launched, and a professional conversion advisory service is set up
- 1995: Twelve farms in one village (Triesenberg) convert to organic agriculture
- 2009: The agricultural law is introduced, which regulates direct payments

KEY SECTOR INSTITUTIONS

- Organic advisory service Liechtenstein: www.bioland.li
- Farmers' association in the principality of Liechtenstein: www.vbo.li
- Bio Suisse, the Swiss Federation of organic organisations: www.biosuisse.ch

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 1 087 hectares, 67.5 % consists of permanent grassland and grazing areas, 27.3 % arable land, 4.7 % other agricultural land and 0.5 % permanent crops. The key arable crops are green fodder from arable land, as well as cereals and vegetables. The key permanent crops are fruits (apples, berries, pears) and grapes.

MARKET

The most important branch of agricultural production in Liechtenstein is dairy production. More than 60 % of the gross yield in agriculture comes from dairy farming.

An extensive range of organic products is produced in Liechtenstein. The *Milchhof Liechtenstein AG* processes and markets all milk and dairy products from the country, either in Liechtenstein itself, or in Switzerland. During the last years, direct marketing of farm products has become increasingly important.

Top-selling products: Cows' milk, meat (beef and lamb), and cereals.

Market channels: Food processors (*Hilcona AG, Milchhof AG*), wholesalers (*MIGROS, COOP*), trading firms and regional markets are the most important purchasers of organic products from Liechtenstein.

Exports and imports: There are no data on exports and imports. A large share of Liechtenstein's organic produce is sold in Switzerland.

STANDARDS, LEGISLATION, ORGANIC LOGO

The production standards of the Swiss organisation Bio Suisse provide the basis for organic production in Liechtenstein. All the organic farms produce according to the Swiss guidelines, and are subject to annual controls. The standards and practice of controls are the same as in Switzerland, and the Swiss ordinance on organic farming also applies.

An organic logo has been introduced (*Bioland Liechtenstein*) to raise the profile of the country's organic products. It guarantees compliance with the Bio Suisse standards, and proves that products come from Liechtenstein. Because of the shared economic area with Switzerland, that country's organic labels are also used for products from Liechtenstein. Many farmers produce to supply the retailers MIGROS or COOP with organic goods; one farmer produces according to the Demeter standards.

POLICY SUPPORT

As an independent country, Liechtenstein has its own agricultural policy with its own programmes, although that policy is aligned with Swiss agricultural policy, as the two countries operate in the same economic area. There are, however, some differences in legislation. Based on a mission statement by the parliament in 2004, an agricultural framework law was created, which came into effect on 1 July, 2009. According to this, agricultural production in Liechtenstein should be sustainable and market-orientated, and produce healthy and safe food. The agricultural regulations define the rules for organic production and for the different support programmes. Compensatory payments are made according to the area managed organically.

National action plan: There is no action plan for organic farming in Liechtenstein.

Other policy support: The Liechtenstein government provides support for organic advisory services.

RESEARCH & ADVICE

As regards research, Liechtenstein makes use of activities in Switzerland, where the Research Institute of Organic Agriculture (FiBL) plays a leading role.

Advice for farmers is provided by *Bioberatung in Liechtenstein*.

CHALLENGES & OUTLOOK

Organic agriculture has developed strongly in recent years, and a consolidation process is now noticeable. Organic farming has become an inherent part of agriculture in Liechtenstein. It is also anchored in government regulations, with the clear aim of optimising and further developing production.

The goals are to consolidate the organic market by improving processing facilities and adding value to organic products; to expand organic farming further and improve the standard of organic production at the farm level through professional farm management, based on the principles of organic farming; to achieve the market-orientated enhancement of organic production (especially in the vegetable and crop sector) as a basis for diversification in organic farming; and to secure rural livelihoods through the targeted economic development of organic farms.

FURTHER INFORMATION

- VBO, news and information on agriculture in Liechtenstein: www.vbo.li

For other relevant websites, see the sections on highlights for 2013 and key sector institutions.

LITHUANIA

Virgilijus Skulskis[56]

KEY INDICATORS 2012[57]

Area	Organic agricultural area	156 539 hectares
	Change 2002 to 2012	+1 682.9 %
	Change 2011 to 2012	3 %
	Share of total agricultural area	5.4 %
Operators	Organic producers	2 527
	Organic processors	91
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	No data
	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2013

- 7th European Organic Congress takes place in Vilnius in July 2013, organised by the IFOAM EU Group, in cooperation with the Lithuanian EU Presidency

HISTORY OF ORGANIC FARMING

- 1987: The beginning of the organic movement in Lithuania
- 1990: The Lithuanian Association of Organic Agriculture Gaja is established
- 1991: The country's first programme for the transformation to organic farming is approved by the government and implemented by the Tatulos fund in the north of Lithuania
- 1995: First trade fairs for organic food are organised by the Tatulos programme
- 1997: The certification body Ekoagros is established
- 2004: Area-based EU support encourages farmers to convert to organic farming and causes the rapid growth of organic farms, and the expansion of the certified organic area

KEY SECTOR INSTITUTIONS

- Ekoagros (certification body): www.ekoagros.lt
- Gaja, Lithuanian Association of Organic Agriculture: www.lgi.lt/gaja
- Lithuanian Association of Organic Farms
- Tatulos programme (Tatulos programa): www.organic.lt/lt

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 156 539 hectares, 68 % consists of arable land, 27 % is grassland, and 3.4 % permanent crops. The key arable crop groups are cereals (66 923 hectares), protein crops (26 486 hectares), aromatic spices and herbs (6 856 hectares), and oilseeds (5 513 hectares). The key permanent crops are buckthorn (1 992 hectares), black and red currants (1 853 hectares), and apples (832 hectares).

MARKET

The Lithuanian market for organic food is growing, and is currently at an intermediate stage of development.

Top-selling products: Milk and dairy products, bread and cereal products, and vegetables.

Market channels: General retailers, direct sales and other channels.

Exports and imports: Data on exports and imports are not publicly available. For export, cereals are the most important product group.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply and based on this, national rules on organic farming have been prepared and approved by the Lithuanian Minister of Agriculture.

The EU organic logo, the Euro leaf, is used, as well as the national logo, which was adopted by the Minister of Agriculture in January 2009. Green and white or black and white versions can be used.

POLICY SUPPORT

National action plan: There is no national action plan for organic farming and food in Lithuania.

Support under the EU rural development programme: Since 2004, direct payments have been granted under a special scheme based on EU legislation.

Other policy support: Some measures exist for direct sales, research and consulting.

RESEARCH & ADVICE

The main research institutions for organic agriculture are the Aleksandras Stulginskis University (ASU) (former Lithuanian Agricultural University): www.asu.lt; the Lithuanian Institute of Agrarian Economics (LIAE): www.laei.lt; the Lithuanian Research Centre for Agriculture and Forestry (LAMMC): www.lammc.lt; the Institute of Agriculture of LAMMC: www.lammczi.lt; the Institute of Horticulture of LAMMC: www.lsdi.lt; the Lithuanian University of Health Sciences: www.lsmuni.lt and the Institute of Animal Science of the Lithuanian University of Health Sciences: www.lsmuni.lt/en/structure/veterinary-academy/institute-of-animal-science.

The main advisory institutions for organic agriculture are the Lithuanian Agricultural Advisory Centre: www.lzukt.lt; the Chamber of Agriculture of the Republic of Lithuania: www.zur.lt And the Lithuanian Association of Organic Agriculture Gaja.

CHALLENGES & OUTLOOK

One of the biggest challenges is the need for advisory and extension services. At the same time, an imbalance also exists between the large quantities of organic grain produced for animal feed, and the small number of animals.

FURTHER INFORMATION

- Organic Eprints for Lithuania: www.orgprints.org/view/projects/lt.html
- VIC, information about the organic market, organic seed database: www.vic.lt

For other relevant websites, see the sections on key sector institutions and research & advice.

LUXEMBOURG

Raymond Aendekerk[58]

KEY INDICATORS 2012[59]

Area	Organic agricultural area	3 924 hectares
	Change 2002 to 2012	+26 %
	Change 2011 to 2012	+5 %
	Share of total agricultural area	3 %
Operators	Organic Producers	102
	Organic processors	43 (2009)
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 75 million
	Share of total market	No data
	Per capita consumption	EUR 143
	Change in retail sales 2011 to 2012	5-10 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2013

- 25th anniversary of the organic farmers association Bio-Lëtzebuerg (bio-LABEL and Demeter labels)

HISTORY OF ORGANIC FARMING

- 1987: First bio-dynamic farm opens in Luxembourg
- 1988: Two farmers' associations (Bio-LABEL and Demeter) are founded
- 1989: The farmers' cooperative BIOG is founded
- 2007: The Research Institute of Organic Agriculture IBLA is founded
- 2012: The two organic organisations bio-LABEL and Demeter merge to form Bio-Lëtzebuerg

KEY SECTOR INSTITUTIONS

- *Bio-Lëtzebuerg*, the Luxembourgish organic organisation: www.bio-letzebuerg.lu
- *Oikopolis*, the organic trade and service centre: www.oikopolis.lu
- IBLA, the Research Institute of Organic Agriculture Luxembourg: www.ibla.lu

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 3 720 hectares of organic agricultural land (2010), 51.7 % consists of permanent grassland and grazing areas, 41.8 % arable land, and 3.3 % permanent crops. The key arable crops are green fodder from arable land (713 hectares), cereals (633 hectares), and protein crops (74 hectares). The key permanent crops are fruits (87 hectares) and grapes (22 hectares).

MARKET

Luxembourg's organic market has grown steadily by 5-10 % per year, for a number of years. The country now has a small but well developed market, with one of the highest per capita consumption rates for organic products in the world. At least 80 % of the organic products are imported.

Market channels: 45 % general retailers, 45 % specialised retailers, 5 % direct marketing, 5 % other channels.

Exports and imports: Data on exports and imports are not publically available. It can be assumed that Luxembourg imports around 80 % of the organic products that are consumed nationally. Exports are nearly zero.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply in Luxembourg.

There is no national logo for organic products. The two logos of Bio-Lëtzebuerg (Demeter and bio-LABEL) are used.

POLICY SUPPORT

National action plan: An action plan for organic food and farming is in place in Luxembourg (2009–2013), covering research, marketing and processing, public awareness, schooling, and training. The plan is financed by the Ministry of Agriculture.[60]

Support under the EU rural development programme: Payments are granted under a special organic scheme (environment), which has been in operation since the beginning of the 1990s.

Other policy support: The Ministry of Agriculture supports the organic advisory services and the farmers' organisation Bio-Lëtzebuerg.

RESEARCH & ADVICE

The main institutions that conduct research into organic agriculture are the Research Institute of Organic Agriculture (IBLA), and the *Centre de Recherché Public Gabriel Lippmann,* www.crpgl.lu. The IBLA advisory service provides specialised advice to farmers and winegrowers, as well as training courses and technical information for practitioners.

CHALLENGES & OUTLOOK

One of the key challenges is the need to ensure a better domestic supply of organic food. Despite the rapidly growing market, the country's farmers are not converting. This problem is currently being actively addressed by *Bio*-Lëtzebuerg and the IBLA advisory service, who are working with actors in processing and marketing.

FURTHER INFORMATION

- Cooperative Biobauerengenossenschaft: www.biog.lu
- Organic farmers' shops: www.naturata.lu

For other relevant websites, see the sections on key sector institutions and research & advice.

MONTENEGRO

Nataša Mirecki[61]

KEY INDICATORS 2012[62]

Area	Organic agricultural area	3 068 hectares (2011)
	Change 2010 to 2011	+35 % (2010 to 2011)
	Share of total agricultural area	0.6 % (2011)
Operators	Organic producers	100 (2011)
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Domestic market value	No data
	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

In 2013, the country is to adopt a new organic law.

HISTORY OF ORGANIC FARMING

- 2004/5: Organic law and secondary legislation are adopted
- 2008 - 2012: Two projects of international support are implemented
- 2011: The National Association of Organic Producers of Montenegro is established
- 2012: The National Action Plan for the Development of Organic Agriculture is adopted

KEY SECTOR INSTITUTIONS

- Biotechnical Faculty of the University of Montenegro: www.btf.me
- Monteorganica, certification body: www.orgcg.org
- Organic Montenegro, the National Association of Organic Producers of Montenegro: www.organicmontenegro.me

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 3 068.07 hectares, 93.5 % consists of grassland/grazing areas, while 6.5 % are arable and permanent cropland. The key crops from arable land are field crops and cultivated herbs (119.81 hectares). The key permanent crops are fruit (75.52 hectares) and grapes (2.67 hectares). More than 139 000 hectares are certified for the collection of wild herbs and forest fruits.

MARKET

The organic market in Montenegro has grown in recent years; nevertheless most organic products are still imported. The main sales channels are specialised shops, supermarkets and direct marketing. Data on exports and imports are not publicly available.

STANDARDS, LEGISLATION, ORGANIC LOGO

In Montenegro, the organics law, Sl. List RCG, br. 49/04 applies. There is a national logo for organic products.

POLICY SUPPORT

Compensatory payments are granted under a special scheme which has been running since 2004.

National action plan: There is a national action plan for the development of organic production (2012-2017).

Other policy support: Additional support is provided for advisory services and participation in international projects.

RESEARCH & ADVICE

The main institution carrying out research into organic agriculture is the Biotechnical Faculty of the University of Montenegro. Advice is provided by the cantonal advisory services and by Switzerland's Research Institute of Organic Agriculture (FiBL). The latter provides specialised advice for farmers, as well as training courses and technical information for practitioners.

CHALLENGES & OUTLOOK

One of the key challenges facing the Montenegrin organic sector is the need to enhance the domestic supply of organic food. Meeting the demand for organic products in luxury hotels is also a big challenge for organic producers.

FURTHER INFORMATION

- Ministry of Agriculture and Rural Development: www.mpr.gov.me
- Information about activities of the advisory services: www.savjetodavna.org

For other relevant websites, see the section on key sector institutions.

NETHERLANDS

Marian Blom[63]

KEY INDICATORS 2012[64]

Area	Organic agricultural area	48 038 hectares
	Change 2002 to 2012	12.7 %
	Change 2011 to 2012	1.8 %
	Share of total agricultural area	2.5 %
Operators	Organic producers	1 600
	Organic processors	1 700
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 934.3 million[65]
	Share of total retail sales	2.3 %
	Per capita consumption	EUR 47
	Change in retail sales 2011 to 2012	14.3 %
	Organic exports	EUR 783 million
	Organic imports	No data

HIGHLIGHTS FOR 2013

- There are no signs that the growth of organic production in the Netherlands will fall off.
- As a further development of the private EKO label, it will be used to signify best practices in organic production and processing.

HISTORY OF ORGANIC FARMING

- 1947: The Warmonderhof establishes the first bio-dynamic agricultural school; it still offers training in organic agriculture today
- 1970s: The organic sector grows slowly: in 1972 there are 85 organic farms in the Netherlands, rising to 359 by the end of the 1980s
- 1992: *Platform Biologica* is founded as a new organisation for the entire sector (today renamed as Bionext)
- 2001 to 2004: First action plan implemented – Policy document on organic agriculture
- 2008 to 2011: Third action plan implemented – Policy document on organic agriculture 2008-2011 – Organic connections, perspectives for growth

KEY SECTOR INSTITUTIONS

- Biohuis, organic farmers' network: www.biohuis.org
- Bionext, umbrella organisation and information portal for the organic sector: www.bionext.nl
- Biowinkelvereniging, the organic shop foundation
- DLV – advisory services with an organic branch
- Biokennis, archive for organic food and farming research: www.biokennis.nl
- Louis Bolk Institute: research and international cooperation
- Skal, the inspection and certification body for organic production in the Netherlands: www.skal.nl
- VPB, Dutch trading and processing association: www.vbpbiologisch.nl
- Wageningen University and Research Centre (WUR): www.wur.nl

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 48 038 hectares, 58.9 % consists of permanent grassland and grazing areas, 38.8 % arable land, 1 % permanent crops and 1.3 % other agricultural land. The key arable crops are green fodder from arable land (7 966 hectares), vegetables (4 931 hectares) and cereals (4 075 hectares). The key permanent crops are apples (255 hectares), pears (92 hectares) and berries (69 hectares).

MARKET

Over the past ten years, the organic market has experienced sustained growth.

Top-selling products: Milk and dairy products (EUR 218 million; 4.8 % of all milk and dairy products sold), fresh vegetables and potatoes (EUR 129.7 million; 3.9% of all fresh vegetables and potatoes sold), meat and meat products (EUR 127.6 million; 2.7 % of all meat and meat products sold), and bread and bakery products (EUR 79.4 million; 3.2% of all bread and bakery products sold).

Market channels: General retailers (52.8 %), specialised/organic retailers (31.9 %) and catering (15.3 %)

Exports and imports: In 2012, based on interviews with a number of major exporters, the value of exports was estimated at EUR 783 million. As one of Europe's major ports is located in the Netherlands, large quantities of goods are imported and re-exported to other European countries.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply in the Netherlands.
Organic producers can use the EKO logo on Dutch products. The EKO programme is to be developed further in the coming years. Since 2010, the private EKO label has also included a scheme for shops and restaurants.

POLICY SUPPORT

National action plan: There is no separate policy or action plan for organic agriculture. The Dutch government has general policies for stimulating rural development and sustainable agricultural production from which organic producers can benefit.

Support under the EU rural development programme: Dutch organic farmers receive support under the EU's Rural Development Programme.

Other policy support: While there is no policy or action plan at the national level, some provinces, such as Noord-Holland, do have policies to stimulate conversion to organic farming.

RESEARCH & ADVICE

Farmers wishing to convert to organic farming can access support to avail themselves of technical advice and training from private consultancies. The Ministry of Economic Affairs provides up to a maximum of 60 % of the funding for research into organic food and farming. The rest is paid for by the sector. Research is carried out by the various institutes of Wageningen University and Research Centre, and the Louis Bolk Institute.

CHALLENGES & OUTLOOK

The challenge for the coming years is to increase the area under production and to guarantee the organic quality of the products being traded.

FURTHER INFORMATION

- Organic Eprints for the Netherlands: www.orgprints.org/view/projects/nl.html

For other relevant websites, see the section on key sector institutions.

NORWAY

Gerald Altena[66]

KEY INDICATORS 2012[67]

Area	Organic agricultural area	55 260 hectares
	Change 2002 to 2012	+70 %
	Change 2011 to 2012	-0.4 %
	Share of total agricultural area	5.1 %
Operators	Organic producers	2 590
	Organic processors	705 (incl. importers)
	Organic importers	33
	Organic exporters	No data
Market and trade	Retail sales	EUR 209 million
	Share of total market	1 %
	Per capita consumption	EUR 43
	Change retail sales 2011 to 2012	+17.2 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2013

- New organic labelling scheme for hotels, restaurants and catering (horeca) is introduced
- Retail sales increased by 17.2 % from 2011 to 2012

HISTORY OF ORGANIC FARMING

- 1931 First organic (biodynamic) farm, *Nordre Sletner gård*, opens
- 1973 The first organic association for consumers and producers, *Norsk Økologisk Landbrukslag,* is founded
- 1986 Debio is established as an organic control body
- 1994 EU Regulation (EEC) No 2092/91 is implemented in Norway as part of the Agreement on the European Economic Area (EEA); at the same time, a conversion grant is launched

KEY SECTOR INSTITUTIONS

- *Biologisk-dynamisk Forening*, Biodynamic Association: www.biodynamisk.no
- Debio, certification body: www.debio.no
- *Norsk Landbruksrådgiving (NLR)*, Norwegian Advisory Service: www.lr.no
- NORSØK, *Norsk senter* for økologisk landbruk, Norwegian Centre for Organic Agriculture: www.norsok.no
- Oikos: www.oikos.no
- *Bioforsk Økologisk*, Bioforsk Organic Food and Farming Division, organic research at the Norwegian Institute for Agricultural and Environmental Research: www.bioforsk.no/okologisk, www.agropub.no

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the organic agricultural land, 80 % (44 000 hectares) consists of arable crops, 18 % permanent grassland and grazing areas (10 124 hectares), and 0.5 % permanent crops (269 hectares).The main arable crops are green fodder from arable land (34 000 hectares), followed by cereals (8 874) and vegetables (218 hectares).

MARKET

The market share for organic production is proportionally lower than is the share of the total agricultural area being farmed organically. Most organic products are sold through supermarkets.

Top-selling products: Dairy products (EUR 41.4 million, 1.7 % of total sales); potatoes and vegetables (EUR 28.8 million, 2.2 % of total sales); cereals/bakery products (EUR 9.6 million (0.9 % of total sales); eggs (EUR 14 million, 5.3 % of total sales); fruit and berries (EUR 8.6 million, 0.8 % of total sales); and meat (EUR 7.7 million, 0.3 % of total sales).

Market channels: 76 % of organic products are sold through supermarkets and 23 % through other market channels. Direct sales account for 1 %.

STANDARDS, LEGISLATION, ORGANIC LOGO

Norway's relations with the European Union are mainly governed by the Agreement on the European Economic Area (EEA). This agreement, which has been in force since 1 January 1994, extends the EU's legislation on the single market to include Norway, Iceland and Liechtenstein.[68]

The *Debio Ø logo* is supported by the authorities; it is used on both national and imported products.

POLICY SUPPORT

Grants are available for organic plant production and organic animal production. Conversion support is being provided until 2014. New support for organic projects can be announced from year to year.

National action plan: The Norwegian Action Plan *Økonomisk, agronomisk – økologisk*! (Economic, Agronomical – Organic!) aims to ensure that 15 % of food production (crops and livestock) and 15 % of consumption (imported and national products) are organic by 2020. However, it is not clear how much money is available to achieve that goal.[69]

Other support: All conventional farmers have access to free advice from the Norwegian Advisory Service (NLR) on how to convert to organic production.

RESEARCH & ADVICE

Organic farming research is incorporated into national agricultural research at the state research stations of Bioforsk. The key institution for organic research is *Bioforsk Økologisk* located at Tingvoll Gård, Tingvoll, www.bioforsk.no.

Organic advice is incorporated in the national agricultural advisory services – *Norsk Landbruksrådgivning* in Ås, www.nlr.no.

CHALLENGES & OUTLOOK

There is a need to secure ongoing political support for action plans that include measures to support production. At the same time, a balance must also be struck between production and the domestic market.

FURTHER INFORMATION

- Organic Eprints for the Norway: wwworgprints.org/view/projects/no.html
- Information on organic agriculture in Norway: www.okologisk.no
- Norwegian Agricultural Authority, key figures for organic production and trade: www.slf.dep.no

For other relevant websites, see the sections on key sector institutions and research & advice.

POLAND

Dorota Metera[70]

KEY INDICATORS 2012[71]

Area	Organic agricultural area	661 687 hectares (2012)
	Change 2002 to 2012	+1137 %
	Change 2011 to 2012	+8.6 %
	Share of total agricultural area	3.4 % (2012)
Operators	Organic producers	25 944 (2012)
	Organic processors	312 (processors and traders)
	Organic importers	30
	Organic exporters	No data
Market and trade	Retail sales	EUR 120 million in 2011; EUR 146 million in 2013 (estimates)
	Share of total market	0.26 % (the value of the total food market in 2012 was EUR 56 billion)
	Per capita consumption	EUR 3.8
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHT FOR 2014

EKOLAND, the Association of Organic Producers, will celebrate its 25th anniversary in 2014.

HISTORY OF ORGANIC FARMING

- 1980s: The first courses on biodynamic and alternative farming systems are held in different cities by Mieczysław Górny and his team, and by experts of the Demeter Association
- 1989: EKOLAND, the Association of Organic Producers, is registered after the first free election following the country's political transition
- 1990: Producer inspections begin, based on the EKOLAND standards; the first 29 farmers receive their certificates
- 1999: A subsidy system for organic agricultural land is financed by the Ministry of Agriculture
- 2004: Poland joins the European Union (EU) and starts agri-environmental programmes with a support system for organic farming

KEY SECTOR INSTITUTIONS

- EKOLAND, the Association of Organic Producers: www.ekolandpolska.pl
- *Forum Rolnictwa Ekologicznego im. M. Górnego*, Forum of Organic Farming M. Górny: www.forumrolnictwaekologicznego.pl/cms
- *Podkarpacka Izba Rolnictwa Ekologicznego*, Lower Carpathian Chamber of Organic Farming: www.pire.swilcza.com.pl

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic area of 661 956 hectares[72], 53.4 % consists of arable land, 35.4 % permanent grassland and grazing areas, 8.7 % permanent cropland, and 2.5 % other agricultural land. The key arable crops are green fodder from arable land, including temporary grasses and grazing areas (207 923 hectares), cereals (122 818 hectares), and vegetables (9 379 hectares). The key permanent crops are apples (35 375 hectares), berries (14 633 hectares) and other temperate fruits (6 615 hectares).

MARKET

The market for organic products is growing slowly but continuously; organic products can now also be found in conventional shops and supermarkets, rather than just specialised small organic shops.

Top-selling products: vegetables, fruits and cereal products.

Market channels are specialised organic shops, supermarkets, covered markets, direct sales to consumers, internet shops.

Exports and imports: The key export products are mainly frozen berries, vegetables, and apple juice concentrate and cereals. The key imported products are processed products, exotic fruits, spring vegetables, and tea and coffee. No data are available for total exports and imports.

STANDARDS, LEGISLATION, ORGANIC LOGO

In Poland, organic farming is subject to both the EU legislation and other regulations, and the Polish act on organic farming of 25 June 2009, which introduced a certification system.

The EU organic logo is used.

POLICY SUPPORT

National action plan: The Action Plan for Organic Food and Farming for 2011-2014 (*Plan Działań dla* Żywności *i Rolnictwa Ekologicznego w Polsce na lata 2011-2014*) pursues the main targets of market development, consumer awareness and the development of production technologies. The level of available funding is not known.[73]

Support under EU rural development programmes: Include payments for organic agriculture as part of the Agri-environmental programme, and reimbursement of inspection costs as part of the measure Participation of farmers in *Food Quality Schemes*.

Other policy support: There is no further policy support.

RESEARCH & ADVICE

Selected research projects are financed by the Ministry of Agriculture and Rural Development.

A system of agri-environmental advisory services (public and private) has been developed since 2004; some advisors are specialised in organic farming.

CHALLENGES & OUTLOOK

The market for organic products shows slow but stable growth. Many processed products are imported, because the national processing industry is still its infancy. The area of land being farmed organically will probably decrease due to a change in the subsidy system under the new Common Agricultural Policy (CAP) from 2014.

FURTHER INFORMATION

- Organic Eprints for Poland: www.orgprints.org/view/projects/pl.html
- Ministry of Agriculture and Rural Development, organic farming pages: www.minrol.gov.pl/pol/Jakosc-zywnosci/Rolnictwo-ekologiczne
- GIJHARS *(Główny Inspektorat Jakości Handlowej Artykułów Rolno-Spożywczych)*, Main Agriculture and Food Quality Inspection: www.ijhars.gov.pl/rolnictwo-ekologiczne.html
- Eco Arka, information on organic farming: www.ekoarka.com.pl

For other relevant websites, see the sections on key sector institutions.

PORTUGAL

Catarina Crisóstomo[74]

KEY INDICATORS 2011[75]

Area	Organic agricultural area	219 683 (2011) (includes 19 533 hectares of forest areas)
	Change 2002 to 2011	+120 % (2002-2011)
	Change 2010 to 2011	+4 % (2010-2011)
	Share of total agricultural area	6.0 %
Operators	Organic producers	2 603 (2011)
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 20 – 22 million (2010)
	Share of total market	0.2 %
	Per capita consumption	EUR 2
	Change 2010 to 2011 [%]	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- Together with the IFOAM EU Group, the organic farming organisation AGROBIO organised a high-level conference on the Common Agricultural Policy (CAP) in Lisbon
- Representatives of the Portuguese Agricultural Ministry, and of the two organic organisations INTERBIO and AGROBIO attend the 7th European Organic Congress in Vilnius, Lithuania, organised by the IFOAM EU Group

HISTORY OF ORGANIC FARMING

- 1985: AGROBIO, the first national organic farming organisation, is set up
- 1993: BIOCOOP, a cooperative of organic consumers is formed in Lisbon
- 2004: Portugal's first organic farmers' market is inaugurated in Lisbon
- 2005: INTERBIO, the inter-professional organic farming organisation, is established
- 2011: INTERBIO drafts a proposal for an organic action plan and holds high-level meetings to lobby for a national organic farming strategy

KEY SECTOR INSTITUTIONS

- DQRG/DGADR (Quality and Genetic Resources Unit of the Directorate General for Agriculture and Rural Development), state department of organic farming: www.dgadr.mamaot.pt
- AGROBIO, the Portuguese Organic Farming Association: www.agrobio.pt
- INTERBIO, the Inter-professional Association for Organic Agriculture: www.interbio.pt
- SATIVA, the largest Portuguese control body: www.sativa.pt

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 219 683 hectares farmed organically (2011), 59.9 % consists of permanent grassland and grazing areas, 12.2 % arable crops and 14.3 % permanent crops. The key crops from the arable land are green fodder (15 369 hectares), arable crops (cereals, oilseeds and protein crops, etc – 9 377 hectares) and aromatic plants (1 324 hectares). The key permanent crops are olives (18 345 hectares), fruit (6 471 hectares) and nuts (4 177 hectares).

MARKET

The Portuguese organic market is at an early stage of its development, and its share of the total food market is still small. It is nevertheless a flourishing sector. Over the last few years, there has been strong demand for organic food, boosting the number of specialised organic shops and organic farmers' markets, and raising sales of organic products in mainstream supermarkets and health/organic food shops. Even in the current economic situation, the growth of organic retail sales is not showing any signs of slowing down.

Exports and imports: Exports play a major role for products such as wine and olive oil. The bulk of the organic processed food products is imported.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply.

There is no national logo for organic products.

POLICY SUPPORT

National action plans: As yet, there is no national organic action plan.

Support under the EU rural development programme: Area payments for organic farming are provided under PRODER. However, the support scheme is closed to new entrants due to budget restrictions since January 2011. Financial support for organic certification was provided until the end of 2010. Other PRODER support measures that until recently benefited the organic sector included the provision of *information about, and promotion of quality products*, *cooperation for innovation*, and the *provision of specialised training*.

Other policy support: As part of the community initiative EQUAL, the PROVE project promoted the start of local box schemes organised by groups of small-scale farmers (including organic producers).

RESEARCH & ADVICE

Research on organic farming is carried out at some regional agricultural bodies, agricultural higher schools and universities.

Three private companies, AGROBIO and several regional organic farmers associations all provide technical support. On the Island of Madeira, the local government has created a separate department to provide technical advice and support research.

CHALLENGES & OUTLOOK

Organic agriculture plays a crucial role in optimising the use of a territory characterised by vast rural areas, poor soils, a harsh climate and a fragile socioeconomic situation. Therefore, more than ever before, there is a strong need for a national integrated development strategy. The main areas of action would be farmer-to-farmer knowledge sharing and learning platforms, applied research for organic cropping systems (including agro-forestry and animal husbandry), advanced organic seed production, weed and soil management expertise, value-added organic food processing industries, the promotion of close consumer-producer links, the collection of market data, and the promotion of greater transparency in a harmonised control system at the EU level.

FURTHER INFORMATION

- Organic Eprints for Portugal: www.orgprints.org/view/projects/pt.html
- Ministry of Agriculture, organic farming pages: www.dgadr.mamaot.pt/val-qual/mod-bio and www.dgadr.mamaot.pt/sustentavel/modo-de-producao-biologico.

For other relevant websites, see the sections on key sector institutions.

ROMANIA

Boldizsár Megyesi[76]

KEY INDICATORS 2012[77]

Area	Organic agricultural area	288 261 hectares[78]
	Change 2002 to 2012	+560 %
	Change 2011 to 2012	+25 %
	Share of total agricultural area	2.1 %
Operators	Organic producers	15 315 producers
	Organic processors	105 processors
	Organic importers	3 importers
	Organic exporters	No data
Market and trade	Retail sales	EUR 80 million in 2011
	Share of total market	No data
	Per capita consumption	EUR 4 (2011)
	Change in retail sales 2011 to 2012	No data
	Organic exports	EUR 200 million
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- Rapid growth of certified organic farm units and area
- The details of EU and national subsidies remain uncertain, and the flow of information between farmers, the national government and the EU is insufficient
- The changes in GMO legislation and the possible spread of GMO plants may cause problems

HISTORY OF ORGANIC FARMING

- 1997: The first association of organic farming is founded – the Bioterra Association.
- 2000: The first national legislation on organic farming is implemented (Emergency Ordinance of the Government O.U.G nr. 34 / 2000, followed by Law 38/2001).
- 2001: The Bureau for Organic Farming (ANPE) at the Ministry of Agriculture (MADR) is established.
- 2004: The first inspection and certification organisation, SC Ecoinspect, is founded.
- 2005 - 2012: Several control bodies are established.
- 2010: A conversion subsidy for farmers is established according to the Government's decision 759/2010. This is intended to improve the quality of agricultural products.

KEY SECTOR INSTITUTIONS

- Organic Farmers Association of Romania Bioterra: www.bioterra.org.ro
- Romanian Association for Sustainable Agriculture (ARAD): www.agriculturadurabila.ro
- EcoR Partner – Resource Centre for the Promotion and Marketing of Organic Products (EcoR): www.ecor.ro
- Bio-Romania Association: www.bio-romania.org

PRODUCTION BASE: LAND USE AND KEY CROPS

In 2012, of the 288 261 hectares of agricultural land, 166 806 hectares or 57.8 % were arable land, 105 836 hectares (36.7 %) were permanent grassland and grazing areas, and 7 783 hectares (1.8 %) were permanent crops. The main arable crop groups were cereals (106 149 hectares), green fodder from arable land (11 083 hectares) and oilseeds (43 923 hectares). The main permanent crop groups were fruit (4 668 hectares), grapes (1 649 hectares), and berries (327 hectares).

MARKET

The Romanian organic sector is highly export-oriented. In the last three years, conversion subsidies have made organic farming more attractive, leading to strong growth in the certified area.

There is little consumer awareness regarding organic quality among Romanians, who are rarely willing to pay a premium for certified organic products. Control organisations report that neither food processors nor consumers ask for certified products, even if they buy and use organic produce. There is a wide-spread assumption that home-grown products are in fact organic products.

Top-selling products: Cereals (wheat and maize), vegetables, honey and wine.[79]

Market channels: Box-schemes, farmers' markets, specialised shops and supermarkets.

Exports and imports: It is generally acknowledged that the main driving force for the organic sector is the export market, plus, to some extent, the growing demand for healthy food among the wealthier middle class. The main export products are cereals, and collected wild mushrooms and berries. The main import products are processed food.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply. The first national legislation on organic farming - the *Emergency Ordinance of the Government O.U.G nr. 34/2000* - was issued in 2000. This was followed by Law 38/2001 in 2001. The legislation is up-to-date and follows EU Regulation (EC) No 834/2007. Organic producers must be certified by one of the registered control bodies. There is a national logo for organic products, which is owned by the Ministry of Agriculture and Rural Development. It can be used for products that comply with the Romanian Organic legislation.

POLICY SUPPORT

National action plan: An action plan ran from 2004 to 2008: the *Sustainable development strategy for the agriculture and food industry 2004-2008 MADR* (*Strategia de dezvoltare durabila a agriculturii si alimentatiei 2004-2008 – MADR*). Work on a new strategy/action plan is currently in progress.

Support under EU rural development programmes: Subsidies for certified organic farmers are available through the agri-environmental measures of the National Rural Development Plan (*Programul National de Dezvoltare Rurala*). The first subsidies for organic agriculture appeared in 2004. Between 2005 and 2007 subsidies for organic agriculture were available through the SAPARD programme as agri-environmental support. Since 2007, there have been subsidies from a number of EU funds. Until 2011, no support was available for conversion to organic farming. As the strong growth in the area of organically farmed land and the number of producers shows, the conversion subsidies were attractive. However, they did not often bring about a sustainable change, with many farmers quitting organic farming when they realised the support was less than they expected.

Other policy support: The organic sector is specifically named in Romania's export strategy.

RESEARCH & ADVICE

The main institutions conducting research in organic farming are the National Agricultural Research and Development Institute (NARDI) and the Research Station for Vegetables Bacau (*Statiunea de Cercetare Dezvoltare pentru Legumicultura Bacau*) www.legumebac.ro.

A number of private sector organisations offer advice to farmers: the Bioterra Association and the Romanian Association for Sustainable Agriculture (ARAD) are especially active in promoting organic agriculture. Eco-Ruralis, www.ecoruralis.ro/web/en/, promotes the values associated with organic farming, as well as food sovereignty and direct producer-consumer links.

CHALLENGES & OUTLOOK

The challenges include in consistencies in compensatory payments from the national government as well as concerns GMO regarding adequate protection form GMO cross-contamination. The development and continued growth of large-scale farms reflects the ongoing challenges facing small to medium sized farms. Finally, the expansion of industrial and mining activities in mountain areas also poses a challenge to organic agriculture in Romania.

FURTHER INFORMATION

- Organic Eprints for Romania: www.orgprints.org/view/projects/ro.html
- Ministry of Agriculture and Rural Development, organic farming pages: www.madr.ro/ro/agricultura-ecologica.html
- National Agricultural Research and Development Institute (NARDI), Gheorghe Ionescu-Şişeşti Academy of Sciences for Agriculture and Forestry: www.incda-fundulea.ro/index.html

For other relevant websites, see the sections on key sector institutions and research & advice

SERBIA

Jelena Milic[80]

KEY INDICATORS 2012[81]

Area	Organic agricultural area	6 340 hectares
	Change 2011 to 2012	+1 %
	Share of total agricultural area	0.2 %
	Organic producers	1 073 (including producers' cooperatives)
Operators	Organic processors	32
	Organic importers	30
	Organic exporters	9
	Domestic market value	Not data
Market and trade	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	EUR 3.8 million
	Organic imports	EUR 3.7 million

HIGHLIGHTS FOR 2013

- The domestic body, the Organic Control System, is officially listed by the European Commission
- The third organic product exhibition takes place at the international trade fair in Novi Sad (May 2013)
- The fourth BioBalkan Expo takes place in Belgrade (September 2013)
- The ninth International Festival of Organic Products (Biofest) is held in Subotica (October 2013)

HISTORY OF ORGANIC FARMING

- Mid 1980s: Organic agriculture starts through the initiative of individual small farmers
- 1990: The NGO Terra's is founded by a network of producers, farmers, advisors and academics involved in organic production
- 2000: The first national law on organic agricultural production (Official Gazette 28/2000) is adopted by the federal parliament
- 2005: The Ministry of Agriculture (MAFWM) establishes the Department for Organic Production. Terra's and the Green Network of Vojvodina organise the first international organic products festival, the Biofest, in Subotica
- 2009: The National Association for organic production, Serbia Organica, is founded

KEY SECTOR INSTITUTIONS

- Terra's association: www.terras.org.rs
- Serbia Organica, National Association for Organic Production: www.serbiaorganica.info
- ATS: Accreditation body of Serbia: www.ats.rs

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic agricultural area of 6 340 hectares, 84.6 % consists of arable and permanent crops, while 15.3 % is permanent grassland and grazing areas. The most common arable crops account for 47 % of the agricultural land (including 2 522 hectares of cereals). This is followed by fruit production (26 %, including 1 415 hectares of apples, raspberries and plums), forage crops (12 %), plants for industrial uses (10 %, 541 hectares), vegetables (2 %,113 hectares) and medicinal and aromatic plants (0.5 % of the organic agricultural area).

MARKET

The supply of organic products on the local market, from both domestic production and imports, has been expanding in previous years. However, it is still limited in terms of the range and quantities of products available. Moreover, the expansion of the domestic market is hindered by the insufficient purchasing power of consumers. Organic products can be found in specialised shops, in green markets in the big cities (Belgrade, Novi Sad, Subotica) and in several supermarket chains. With the exception of organic milk, there is a lack of organic products from livestock farming.

Market channels: Primarily specialised shops, green markets and supermarkets.

Exports and imports: Data on exports and imports are not publically available. Each authorised control body is obliged to submit export and import data to the Ministry of Agriculture, Forestry and Water Management. However, data on export values are incomplete because some of the exporters consider these to be confidential.

STANDARDS, LEGISLATION, ORGANIC LOGO

Production in Serbia is regulated by the Law on Organic Production (Official Gazette No. 30/10) and the Rulebook on the control and certification of organic production and organic production methods (Official Gazette No. 48/11).

There is a national organic logo.

POLICY SUPPORT

The Law on Subsidies for Agriculture and Rural Development (Official Gazette No. 10/13) is the basic legal document which includes and defines subsidies for organic production (direct payments and subsidies for rural development measures). The rulebook regulating the subsidies for organic production (Official Gazette No. 38/13) includes subsidies for organic plant and livestock production, premiums for organic milk and subsidies for fuel.

The rulebook regulating subsidies for through the introduction of safety and quality certification of food, of organic products and of products with designated geographic origin, foresees the partial coverage of control and certification costs.

National Action Plan: A new plan for the for the Development of Organic Production 2013 to 2017 is expected to be launched following the adoption of the Strategy for Agriculture and Rural Development 2014 to 2024.

Other policy support: At the local level, some municipalities provide support for organic farming.

RESEARCH & ADVICE

The Institute for Field and Vegetable Crops in Novi Sad, the Institute for Vegetable production in Smederevska Palanka, and the Institute for Food Technology in Novi Sad all conduct research in the area of organic production. The Faculties of Agriculture of the Universities of Belgrade and Novi Sad, and the Faculty of Biofarming in Bačka Topola have introduced masters courses and PhD programmes in organic agriculture.

Advice is provided by the associations and through several agricultural extension services.

CHALLENGES & OUTLOOK

The most important challenges facing the Serbian organic sector include the need to increase the area under organic production as well as the quantity of organic products. It is important also to develop the domestic market and establish well-stocked local points of sale. At the same time, there is a need for an operational and harmonised control and certification system, in line with EU legislation.

FURTHER INFORMATION

- Department for Organic Production: www.dnrl.minpolj.gov.rs

For other relevant websites, see the sections on key sector institutions.

SLOVENIA

Anamarija Slabe[82]

KEY INDICATORS 2012[83]

Area	Organic agricultural area	35 101 hectares
	Change 2002 to 2012	+154 %
	Change 2011 to 2012	+9 %
	Share of total agricultural area	7.6 %
Operators	Organic producers	2 682 (2012)
	Organic processors	16 (2012)
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 44 million (2012)
	Share of total market	1.5 % (2012)
	Per capita consumption	EUR 22
	Change in retail sales 2011 to 2012	10 % (approx.)
	Organic exports	Marginal
	Organic imports	Approximately 80 % of organic food is imported, mainly fresh vegetables and fruits, and processed foods.

HIGHLIGHTS FOR 2013 & 2014

- Improvement in the market cooperation of organic farmers (2013)
- 15th anniversary of the organic farmers' market in Ljubljana (2014)

HISTORY OF ORGANIC FARMING

- 1996: The first organic farming institute is established – the Institute for Sustainable Development (ISD)
- 1996: ISD prepares the first organic standards, which are adopted by the Slovenian Organic Farmers' Association in 1997
- 2000: The private organic logo BIODAR is introduced
- 2001: National rules for organic farming are introduced
- 2005: The government adopts the national organic farming action plan

KEY SECTOR INSTITUTIONS

- IKC, Institute for control and certification at the University of Maribor: www.ikc-um.si/ikcum
- ISD, Institute for Sustainable Development: www.itr.si
- KON-CERT, the Institute of Control and Certification in Agriculture and Forestry Maribor: www.kon-cert.si
- Union of Slovenian Organic Farmers' Associations (USOFA): www.zveza-ekokmet.si/biodar

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 35 101 hectares, 87.36 % consists of grassland, 7.84 % arable land, and 4.28 % permanent crops. The key arable crops are cereals (1 387 hectares), green fodder from arable land (1 800 hectares) and vegetables (1 801 hectares). The key permanent crops are fruits (994.36 hectares), grapes (323.88 hectares) and olives (184.53 hectares).

MARKET

Top-selling products: Fresh vegetables, dairy products and cereals.

Market channels: 85 % of the products are sold in supermarkets (largest share) and specialised retailers; 15 % are sold directly (two thirds on-farm, one third at organic farmers' markets).

Exports and imports: Slovenia imports 80 % of the organic products it consumes.

STANDARDS, LEGISLATION, ORGANIC LOGO

Organic agriculture in the country is subject to EU legislation on organic farming and other regulations (based on the Agriculture Act); there are also rules to determine the areas suitable for organic beekeeping.[84]

There is no national organic logo.

POLICY SUPPORT

National action plan: The National Action Plan for Organic Agriculture (*Akcijski načrt za ekološko kmetijstvo - ANEK*) runs from 2005 to 2015. It has aims to achieve three main targets by 2015: 15 % of farms to be organic, 20 % of agricultural land to be organically cultivated, 10 % of Slovenian products to be organic. Financial resources are provided by the Ministry for Agriculture and the Environment.[85]

Support under the EU rural development programme: Financial support for organic farming has existed since 1999. From 2001-2003, payments were granted through the Slovenian agri-environmental programme (SKOP), and agri-environmental payments were also made as part of the Rural Development Programme 2007-2013. Further support for investments is available through general support schemes, and marketing support can be accessed as part of the quality schemes.

Other policy support: National contributions to the EU co-financed organic promotion campaigns, from 2010 to 2012 and 2013 to 2015.

RESEARCH & ADVICE

The key institutions in the field of organic research are the Institute for Sustainable Development and the Faculty for agriculture and biosystemic sciences of the University of Maribor. Research is conducted into the market, policy, rural development, and technologies (vegetables, cereals and other field crops).

Advisory services are not well developed; knowledge transfer is mainly performed by NGOs.

CHALLENGES & OUTLOOK

Key challenges are an improvement of knowledge transfer; improvement of availability of agricultural land; increase of the production volume; increase of self-sufficiency with organic food, which is currently only 20 %.

FURTHER INFORMATION

- Organic Eprints for Slovenia: www.orgprints.org/view/projects/si-slovenia.html

For other relevant websites, see the section on key sector institutions.

SPAIN

Victor Gonzálvez[86]

KEY INDICATORS[87]

Area	Organic agricultural area	1 593 197 hectares[88]
	Change 2002 to 2012	+212 %
	Change 2011 to 2012	-1.8 %
	Share of total agricultural area	6.4 %
Operators	Organic producers	30 402
	Organic processors	2 790
	Organic importers	111
	Organic exporters	127
Market and trade	Retail sales	EUR 965 million
	Share of total market	1.04 %
	Per capita consumption	EUR 20.5 (2011)
	Change in retail sales 2011 to 2012	No data
	Organic exports	EUR 506 million (2011)
	Organic imports	EUR 219 million (2011)

HIGHLIGHTS FOR 2013

- September 2013: XXI SEAE National Seminar on Rural Development, CAP & agro-ecological innovation
- October 2013: First Mediterranean Symposium on Agroecology & Organic Farming, Valencia
- November 2013: Biocultura Organic Fair Madrid

HISTORY OF ORGANIC FARMING

- 1984: The first Biocultura Organic Fair takes place in Madrid, organised by the sector organisation Vida Sana
- 1989: The first national organic farming legislation is passed
- 1992: The Spanish Society for Organic Farming (SEAE), a non-profit organisation, is founded
- 1998: The CAAE is founded in Andalucía as a regional public certification body. Today this has evolved into a private certification body and non-profit association (Asociación Valor Ecológico), working for the development of organic farming. It also set up the Núñez de Prado Organic Farming Research and Defence Awards
- 2002: First international conference is held on organic olive & olive oil production
- 2007: The National Organic Action Plan is launched
- 2012: The Spanish Society for Organic Farming (SEAE) creates the Ecoelabora award for knowledge generation & dissemination in agroecology and organic farming

KEY SECTOR INSTITUTIONS

- Association Valor Ecológico, providing promotion and training activities: www.ecovalia.org
- Association Vida Sana promotes organic consumption and organises awareness events for the general public (Biocultura Fairs in different cities in Spain): www.vidasana.org
- FEPECO, a Spanish federation of companies that produce, process and market organic products: www.fepeco.es
- Intereco, Association of public organic control bodies: www.interecoweb.com
- SEAE, Spanish Society for Organic Farming: www.agroecologia.net

PRODUCTION BASE: LAND USE AND KEY CROPS

- Of the total area of 1 593 197 hectares, 53.2 % consists of permanent grassland and grazing areas, 22.7 % is permanent crops, and 17.5 % is arable land. The key arable crops are cereals (174 005 hectares), protein crops (45 195 hectares), green fodder from arable land (34 976 hectares), and vegetables (10 245 hectares). The key permanent crops are olives (168 039 hectares), nuts (98 272 hectares), grapes (81 262 hectares), and citrus fruits (6 275 hectares).

MARKET

The Spanish organic market is smaller than average for the European Union, but it has grown steadily in the last five years. This emerging organic market has a per capita consumption for organic products of EUR 20 (2011), and a market share of around 1 %.

Exports and imports: A large proportion of the organic production – mainly fruits, vegetables, wine and oil – is sold in other EU countries. A significant volume of processed organic products is also imported (over EUR 200 million).

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations apply. In some regions (Aragón, Andalucía, Castilla-La Mancha), private control bodies are authorised to control organic producers and processors. In the other regions, semi-public (sector representatives and administrations) or public administrations are responsible for the implementation of EU legislation. Imports and exports are registered by the central authorities.

There is no national logo for organic products, but in all the regions with semi-public or public control bodies, a common logo is used (with the name of the region). In regions without public control bodies, the logos of the private control bodies are used.

POLICY SUPPORT

National action plans: Several organic action plans are being implemented in different regions (Canary Islands, Catalonia, Basque country, etc.), and in other regions, new action plans are currently being formulated (Andalucía, Valencia). However, most of these plans do not have specific targets.

Support under the EU rural development programme: In most of the regions, rural development measures have been supported since 1998. There are sometimes considerable differences between the regions. Each region must decide for itself which crops are to be supported.

Other policy support: Other areas of support include activities to promote organic farming organisations (SEAE, FEPECO, INTERECO, CAAE), support for organic farming research at some state research stations, for the organic advisory service in Andalucía, and for the participation of the most relevant companies at organic trade fairs.

RESEARCH & ADVICE

The main institutions that conduct research for organic agriculture are listed on the website of the Ministry of Agriculture, Food and Environment, www.magrama.es.
Advice is provided by the Andalusian advisory services and by the Spanish Society of Ecological Agriculture, which provides general and specialised advice to farmers, as well as training courses and technical information for practitioners.

Since the beginning of the 1990s, high-level agro-ecology education courses have been developed at the University of Córdoba (UCO, www.uco.es) with the participation of many teachers and students from Latin America. This task is now being taken over by the International University of Andalucía (UNIA, www.unia.es) and the Pablo Olavide University of Seville (UPO, www.upo.es).

CHALLENGES & OUTLOOK

Challenges include the need to change domestic consumption habits regarding organic food, as well as the necessity for a national register of organic inputs. It is also important that an agro-ecological concept for organic production be developed.

FURTHER INFORMATION

- Organic Eprints for Spain: www.orgprints.org/view/projects/es.html
- Ministry of Agriculture, organic farming pages: www.magrama.gob.es/es/alimentacion/temas/la-agricultura-ecologica
- Catalonian Regional Department of Agriculture, organic farming pages: www.gencat.cat/daam/ecoes
- Andalusian Regional Department of Agriculture, organic farming pages: www.juntadeandalucia.es/agriculturaypesca/portal/areas-tematicas/produccion-ecologica/index.html

For other relevant websites, see the sections on key institutions and research & advice.

SWEDEN

Johan Cejie[89]

KEY INDICATORS 2012[90]

Area	Organic agricultural area	477 685 hectares
	Change 2002 to 2012	+123 %
	Change 2011 to 2012	-0.5 %
	Share of total agricultural area	15.6 %
Operators	Organic producers	5 601
	Organic processors	680
	Organic importers	218
	Organic exporters	No data
Market and trade	Retail sales	EUR 917 million
	Share of total market	3.9 %
	Per capita consumption	EUR 95.3
	Change in retail sales 2011 to 2012	-4 % (Source: Statistics Sweden; +3 % according to Ekoweb)
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- The first Nordic Organic Food Fair in Malmö was held in 2013 and will be held again in 2014
- The NGO Swedish Society for Nature Conservation (SSNC) campaigns for organic food 2013-2014
- Martin & Servera, the leading wholesaler for restaurants and public procurement, focus on organic food in 2013 and 2014. KRAV, owner of the well-known KRAV label, targets a higher share of organic food in restaurants

HISTORY OF ORGANIC FARMING

- 1940: *Biodynamiska Föreningen*, the Biodynamic Organisation, located in Järna, is founded
- 1960-1970: The organisation Alternative Farming is active
- 1985: KRAV is founded as an organisation to develop and promote organic standards
- 1985: *Ekologiska Lantbrukarna* Organic Farmers Association is founded

KEY SECTOR INSTITUTIONS

- Ekologiska Lantbrukarna, Organic Farmers Association: www.ekolantbruk.se
- KRAV, organic standards and labelling: www.krav.se
- Ekoweb, independent news and analysis for the national organic market: www.ekoweb.nu
- *Jordbruksverket*, regulations for organic farming and statistics (governmental): www.jordbruksverket.se

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the 477 685 hectares of organic agricultural land, 74.4 % consists of arable land (including green fodder), 22 % permanent grassland and grazing areas, and 0.1 % permanent crops. The key arable crops are green fodder from arable land (250 338 hectares), cereals (86 538 hectares) and protein crops (9 761 hectares).

MARKET

The Swedish market has grown steadily in recent years. In 2012, however, there was a temporary stagnation. There is still high potential for the market to grow further. There is a lack of producers (mainly cereals) and of processed products. Public procurement (e.g. schools, hospitals, kindergartens, etc.) is currently a key driver of development and provides stability. This is driven by political decisions at both national and local levels. The organic market lost ground in the first half of 2012, but it recovered in the second half of the year. Preliminary reports for 2013 indicate growth of between 5 and 10 %.

Top-selling products: Dairy products (33 % of the organic market), followed by fruit/vegetables (25 %), coffee, tea, and dry products (20 %).

Market channels: 55 % of organic products are sold by general retailers, followed by the public sector (17 %), *Systembolaget* (spirits, wine and beer monopoly, 17 %), hotels and restaurants (8 %) and other channels (8 %).

Exports and imports: No data available. Sweden appears to be a net importer of organic goods.

STANDARDS, LEGISLATION, ORGANIC LOGO

EU legislation on organic farming and other regulations is legally binding, and responsibility for oversight is shared by four governmental agencies: *Jordbruksverket*, the Swedish Board of Agriculture, governs agriculture; *Livsmedelsverket*, the Swedish Food Administration, governs processing and some marketing issues; *Komsumentverket*, the Swedish Consumer Agency, governs issues related to consumer marketing; and *Swedac*, the Swedish Accreditation Board, accredits the control bodies.

There are six control and certification bodies.There is no governmental organic logo other than the EU logo. The KRAV logo is a private label, and it is used on about 80 % of organic products. KRAV promotes values that go beyond the EU legislation in terms of climate protection, animal welfare, social accountability and health.

POLICY SUPPORT

National action plan: A national goal to be achieved in 2014 is for 20 % of agricultural land to be certified organic. Furthermore, there is also the target for 25 % of food procurement in the public sector to come from organic sources in 2013. The debate is currently ongoing as to whether a new target should be set.

Support under the EU rural development programme: Supports activities that contribute to organic production. Programmes for 2014 and the coming years have yet to be set up, so little can be said about the new system at present.

RESEARCH & ADVICE

The main institutions conducting research for organic agriculture are the Swedish University of Agriculture (SLU), with its interdisciplinary centre EPOK, the Centre for Organic Food and Farming, www.slu.se/epok, and the Royal Swedish Academy of Forestry and Agriculture, which houses the platform *Ekologiskt Forum* Organic Forum.

Advice is provided to operators by a number of private, institutional and governmental structures. One of the oldest and largest of these organisations is *Hushållningssällskapet*.

CHALLENGES & OUTLOOK

Currently there is a surplus of beef and lamb, but a shortage of cereals. A number of organisations have set ambitious targets for market development. The distribution of products is good, but there is still a need for increased consumer awareness and willingness to switch to organic.

FURTHER INFORMATION

- Organic Eprints for Sweden: www.orgprints.org/view/projects/se.html
- Organic farming, Swedish Board of Agriculture: www.jordbruksverket.se/amnesomraden/miljoklimat/ekologiskproduktion.4.2ada1a6113d67e0bac48000503.html

For other relevant websites, see the sections on key sector institutions and research & advice.

SWITZERLAND

Helga Willer[91]

KEY INDICATORS 2012[92]

Area	Organic agricultural area	125 961
	Share of total agricultural area	12 %
	Change 2002 to 2011	+22.7 %
	Change 2010 to 2011	+2.4 %
Operators	Organic producers	6 173
	Organic processors	No data
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	EUR 1 520.33 million
	Share of total market	6.3 %
	Per capita consumption	EUR 189
	Change in retail sales 2011 to 2012	+5.3 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- The Research Institute of Organic Agriculture (FiBL) celebrates its 40th anniversary
- The *Naturaplan* organic line of the retailer Coop celebrates its 20th anniversary
- Second national field day on arable crops

HISTORY OF ORGANIC FARMING

- 1940s: Hans and Maria Müller promote organic agriculture among farmers in the country
- 1973: The Research Institute of Organic Agriculture (FiBL) is founded
- 1977: The first Scientific Conference of the International Federation of Organic Agriculture Movements (IFOAM) is held in Sissach near Basel, organised by FiBL
- 1980: Bio Suisse, the organic sector organisation, is founded
- 1993: The retailer Coop launches its organic *Naturaplan* product line, followed by Migros in 1995
- 2000: The 13th IFOAM conference takes place in Basel

KEY SECTOR INSTITUTIONS

- Bio Suisse, Swiss federation of organic organisations: www.biosuisse.ch
- bio.inspecta, the largest Swiss inspection body: www.bioinspecta.ch
- FiBL, Research Institute of Organic Agriculture: www.fibl.org
- Swiss Demeter Association: www.demeter.ch

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 125 961 hectares, 78.0 % consists of permanent grassland and grazing areas, 17.4 % arable land and 1 % permanent crops. The key arable crops are green fodder from arable land (102 00 hectares), cereals (6 700 hectares) and vegetables (1600 hectares). The key permanent crops are fruit (500 hectares), grapes (370 hectares) and permanent medicinal and aromatic plants (118 hectares).

MARKET

The Swiss organic market has grown steadily in recent years and is now well developed, with the highest per capita consumption of organic products in the world. At 6.3 %, the market share is also larger than in most other countries.

Top-selling products Eggs (EUR 40.08 million, 20.5 % of all eggs sold), fresh bread (EUR 131.67 million, 18.8 %) and vegetables and potatoes (EUR 136.38 million, 12.9 %).

Market channels include general retailers (mainly Coop and Migros – 77.9 %), specialised retailers (12.5 %), direct marketing (5.5 %) and other channels (4 %).

Exports and imports: Data on exports and imports are not publicly available. It may be assumed, however, that Switzerland imports a large proportion of the organic products that are consumed in the country. In terms of exports, dairy products play a role.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Swiss Organic Law applies (*Verordnung über die biologische Landwirtschaft und die Kennzeichnung biologisch produzierter Erzeugnisse und Lebensmittel*).[93] There is no national logo for organic products, but the logo of the umbrella organisation Bio Suisse is widely used.

POLICY SUPPORT

Direct payments for organic farming are granted under a special scheme (*Direktzahlungsverordnung*) which has been in operation since the beginning of the 1990s. The agricultural policy for 2014 to 2017 is currently still under preparation.

National action plan: There is no action plan for organic food and farming in Switzerland.

Other policy support: Funding for FiBL, the Research Institute of Organic Agriculture, as well as organic farming research and support for the organic advisory services of the cantons.

RESEARCH & ADVICE

The main institutions carrying out relevant research are the Research Institute of Organic Agriculture (FiBL), the state research institutes Agroscope www.agroscope.admin.ch *and the* Institute of Natural Resource Sciences, Zurich University of Applied Sciences (ZHAW), www.lsfm.zhaw.ch/en/lsfm.html. Advice is provided by the cantonal advisory services and FiBL, which provides specialised advice to farmers as well as training courses and technical information for practitioners.

CHALLENGES & OUTLOOK

One of the key challenges facing the Swiss organic sector is the relatively low domestic supply of organic food. Despite the rapidly growing market, the extent of organic agricultural land is only growing slowly. This challenge is currently being addressed by Bio Suisse, together with many other actors in the organic sector.

FURTHER INFORMATION

- Organic Eprints for Switzerland: www.orgprints.org/view/projects/sw.html
- News and background information for organic farmers: www.bioaktuell.ch
- News about the Swiss organic sector: www.bionetz.ch
- Information on organic farming from Coop: www.naturaplan.ch and Migros: www.migros.ch/bio

For other relevant websites, see the section on key sector institutions and research & advice.

TURKEY

Uygun Aksoy[94]

KEY INDICATORS 2012[95]

Area	Organic agricultural area	523 627 hectares
	Share of total agricultural area	2.2 %
	Change 2002 to 2012	+482.9 %
	Change 2011 to 2012	+18.3 %
Operators	Organic producers	57 259
	Organic processors	113
	Organic importers	32
	Organic exporters	34
Market and trade	Retail sales	No data
	Share of total market	No data
	Per capita consumption	No data
	Change in retail sales 2011 to 2012	No data
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013 & 2014

- Increase in the domestic market share for organic products (especially for open markets)
- 5th National Symposium on Organic Agriculture takes place in Samsun (September 2013)
- Organic World Congress of IFOAM takes place in Istanbul, Turkey (October 2014)

HISTORY OF ORGANIC FARMING

- 1985-1986: Certified organic production begins for the export market, in line with the private standards of European control bodies
- 1991: The organic agriculture association ETO is established as an umbrella NGO
- 1994: First regulation on organic plant production is issued
- 1999: First National Symposium on Organic Agriculture is organised by ETO, the Ministry of Agriculture and Ege University
- 2003: The Department of Organic Agriculture is established within the Ministry of Agriculture and Rural Affairs

KEY SECTOR INSTITUTIONS

- Aegean Exporters' Association (AEA): www.eib.org.tr
- Association of Organic Agriculture (ETO): www.eto.org.tr
- Bugday Association for Supporting Ecological Living: www.bugdayglobal.org
- Ege University, Faculty of Agriculture (EUFA): www.agri.ege.edu.tr

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total area of 523 627 hectares, 76.4 % consists of arable crops and 16.5 % permanent crops, while another 4.7 % is given over to permanent grassland and grazing areas. The key arable crops are cereals (197 877 hectares), green fodder from arable land (174 136 hectares) and crops for industrial uses (14 315 hectares). The key permanent crops are olives (36 261 hectares), nuts (19 320 hectares), figs (9 323 hectares) and apricots (4 946 hectares).

MARKET

The major market is still the export market, with European countries being the main destinations. The product range includes dried fruit and nuts, culinary herbs, aromatic plants (roses), pulses and fruit juice. However, the domestic market for plant and animal products is growing rapidly. Fresh vegetables and fruit are the main products in the open markets. Livestock products (milk and dairy products, eggs, meat and meat products) are produced for the domestic market. Of the livestock products, only honey is exported. Cotton is an important crop, especially in the south-eastern part of Turkey. It is processed into yarn and textiles for the export market.

Top-selling products: milk, bread and tomatoes (domestic market). Dried apricots, raisins, apples and apple-based processed products, dried tomatoes and dried figs (export market).

Market channels (estimated shares): for the export market, production, which mostly involves contracted farming, is dependent on the demand from abroad (more than 75 % of produced goods are exported, rising to 100 % for some products). In the domestic market, the main channels are retail chains (60 %), open markets in major cities (25 %), farm-to-farm sales of feed to animal farms (6 %), specialised shops (5 %), internet sales (2 %) and direct sales (2 %)

Exports and imports: No data available. Dried fruit and nuts, and culinary and aromatic plants are the major products for the European export market. Major import products include processed foods (e.g. baby food, chocolate, coffee) from Europe, and raw materials (e.g. cotton, apple juice, pulses) which are generally produced by Turkish companies in neighbouring countries, such as Syria, Iran and Uzbekistan, and then brought in for processing in Turkey.

STANDARDS, LEGISLATION, ORGANIC LOGO

All organic products sold on the Turkish market have to be certified according to Turkish law (Laws no. 5262 of 03/12/2004, published in the Official Gazette no. 25659, and no. 27676 of 18/08/2010, and amendments). The inspection and certification body should be authorised by the Ministry of Food, Agriculture and Livestock (MFAL), based upon certain criteria. Product should carry a label containing the information specified in the regulation. In order to be sold as organic on the Turkish domestic market, certification according to Turkish regulations is compulsory, and this must be carried out by certification bodies authorised by MoFAL. However, any food and non-food commodity can be certified for export according to other official or private standards. If a control body certifies only for the EU, there is no legal obligation for authorisation from MoFAL. The use, size and colour etc. of the organic logo is specified in Turkish legislation. The use of the organic logo is compulsory. For imported organic products and products in conversion the logo cannot be used.

POLICY SUPPORT

In 2013, payments for organic agriculture amounted to TRY 500 per hectare for fruits and vegetables, TRY 100 per hectare for field crops, TRY 5 per beehive, TRY 0.35 – 0.45 per fish, and TRY 10 – 150 per head for ruminants and other livestock. Organic farming also receives an additional valuation when it comes to allotting rural development support.

National action plans: The Organic Agriculture National Action Plan 2013-2016 (*Organik Tarım Ulusal Eylem Planı 2013-2016*) was prepared in 2013 through a stakeholder consultation. It will be financed by the Ministry of Food, Agriculture and Livestock, with an expected budget of 6 250 000 Turkish lira (TRY)[96], The action plan addresses five main areas: developing and expanding organic farming, strengthening of services related to inspection and certification, improvement of data collection infrastructure and traceability, development of training and extension services, and the development of institutional capacities.

Other policy support: Additional support is available for the purchase of certified propagation material, biological controls and organic fertilisers, for soil analysis and for working in environmentally fragile areas, and for making use of agricultural consultants. The agricultural banks allow a 50 % reduction in the interest rate for loans to organic farmers. For exporters, 50 % of the cost of analyses is subsidised, if no residues are found.

RESEARCH & ADVICE

DG Research and Policy at the Ministry of Food, Agriculture and Livestock supports research into organic agriculture, in its approximately 30 national research institutes. A research group meeting takes place annually, which is open to all stakeholders.

Advice is given through organic units in every provincial directorate. Private consultancies are promoted. Some universities (*Ege, Erzurum Atatürk, Ankara,* Çukurova*, 19 Mayıs, Uludağ*) have included organic research in their research and training programmes.

CHALLENGES & OUTLOOK

At the technical level, the theory is well-known but practical experience is limited. The farmers' awareness of the basic organic principles remains low. There is considerable potential in the domestic market for processed food and non-food products. Individual institutions conduct their own bilateral cooperation with institutions in the European Union. However there is still a need to strengthen links with EU institutions and companies, not only in research and education but also at the farmers' level.

FURTHER INFORMATION

- Organic Eprints for Turkey: www.orgprints.org/view/projects/turkey.html
- Department of Agricultural Research and Policies, TAGEM: www.tagem.gov.tr
- Department of Good Agricultural Practices and Organic Agriculture: www.bugem.gov.tr

For other relevant websites, see the section on key sector institutions.

UNITED KINGDOM

Susanne Padel[97]

KEY INDICATORS 2012[98]

Area	Organic agricultural area	590 009 hectares
	Share of total agricultural area	3.4 %
	Change 2002 to 2012	-18.6 %
	Change 2011 to 2012	-7.6 %
Operators	Organic producers	4 281
	Organic processors	2 206
	Organic importers	95
	Organic exporters	No data
Market and trade	Domestic market value	EUR 1950 million
	Share of total market	No data
	Per capita consumption	EUR 31.8
	Change in retail sales 2011 to 2012	-1.5 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- The UK Market returned to growth in 2013, after several years of contraction. Actors in the UK are still trying to understand why the market was hit so hard by the financial crisis, compared to other markets in Europe and elsewhere
- Intensive discussions with policy makers about future organic support are on-going in England, Wales, Scotland and Northern Ireland

HISTORY OF ORGANIC FARMING

- 1946: Living Soil written by Eve Balfour, followed by the foundation of the Soil Association
- 1973: The organisation Organic Farmers and Growers is founded
- 1980s: Other organisations (including two other control bodies) are founded
- 1981: Safeway is the first supermarket to sell organic products, followed by Sainsbury's
- 1987: The United Kingdom Register of Organic Food Standards (UKROFS) is established with the aim of unifying organic production standards
- 1994: Area-based support is granted, but rates are lower than in most other EU countries and there is regional variation
- 2003: ACOS (Advisory Committee on organic standards) replaces UKROFS
- 2011: The government dissolves ACOS and its support for conversion advice
- 2007: The Organic Trade Board is established

KEY SECTOR INSTITUTIONS

- Garden Organic, expert advice and information, research: www.gardenorganic.org.uk
- Newcastle University, research: www.nefg-organic.org
- Organic Centre Wales, research: www.organiccentrewales.org.uk
- Organic Farmers and Growers LTD, control body, information for farmers: www.organicfarmers.org.uk
- Organic Research Centre: www.organicresearchcentre.com
- Organic Study Centre Cornwall (Duchy College): www.organicstudiescornwall.co.uk
- Organic Trade Board (OTB), a forum for business leaders from across the UK's organic movement: www.organictradeboard.co.uk
- Scotland's Rural College (SRUC), education and business support for Scotland's land-based industries: www.sruc.ac.uk
- Soil Association, sector organisation: www.soilassociation.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total organic area of 590 009 hectares, 68.7 % consists of permanent grassland and grazing areas (405 569 hectares), 30.4 % arable land (179 227 hectares), and 0.84 % permanent crops (4 952 hectares). The key arable crops are green fodder from arable land (106 525 hectares), cereals (48 123 hectares) and vegetables (10 645 hectares). The key permanent crops are apples (1 284 hectares), nuts (223 hectares) and berries (89 hectares).

MARKET

The market returned to growth in 2013 after several years of decline. The UK market is strongly dominated by multiple retailers (e.g. Tesco, Waitrose, Sainsbury's and Morrison). Box schemes and internet/mail order have shown substantial growth.

Top-selling products: Milk and dairy products (EUR 393.9 million), fresh vegetables and potatoes (EUR 201.3 million), baby food (EUR 199.5 million), fresh fruits (EUR 107.5 million), and meat and meat products (EUR 90.3 million).

Market channels: Consist of general retail (EUR 1 432.3 million), special retail (EUR 307.2 million), direct marketing (EUR 50.9 million), catering (EUR 19.6 million) and other channels (EUR 214.95 million).

Exports and imports: No official import and export data are available for the whole organic sector. Key products imported are likely to be fruit, vegetables and some cereals (e.g. for bread making and feed), whereas some milk and livestock products are also exported.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Soil Association Standard has some differences to EU legislation on organic farming and other regulations; the other control bodies largely use EU legislation, with some minor differences. The Competent Authority (DEFRA) implements the EU Regulation (EC) No 834/2007 without specific national adaptation and has issued a guidance document on issues left to be defined at national level. Some tasks have been delegated to control bodies. There is no national logo, but several private logos of control bodies exist.

POLICY SUPPORT

National action plan: Currently there is no action plan for the whole of the UK. There has been a Scottish Action Plan since 2011, www.scotland.gov.uk/Publications/2011/03/14093552/0.

Support under EU rural development programmes: The main focus is on agri-environment schemes, are direct payments, but some other measures are also implemented, e.g. in Wales. In the UK, there is just low-level support compared to other EU member states, with differences occurring between the four devolved administrations.

Other policy support: Some support is available for sector organisations and research.

RESEARCH & ADVICE

Several institutions, private and public, are active in organic farming research. The Organic Research Centre Elm Farm, Garden Organic (Formerly the Henry Doubleday Research Association), in close collaboration with the Centre for Agro-ecology and Food Security (CAFS) at Coventry University; Nafferton Organic Farming Group at the University of Newcastle, and Aberystwyth University. DEFRA, the Department for Environment Food & Rural Affairs, participates in the ERA-Net project CORE Organic.[99]

Government funding for organic farming research has decreased in recent years. Organic farming advice is provided by several private bodies and some control bodies, with accreditation, training and support provided by IOTA (now part of the Organic Research Centre ORC).

CHALLENGES & OUTLOOK

The biggest challenge in the UK is for the organic market to return to solid growth and to make the case to policy makers that organic farming delivers environmental benefits that are worthy of support and make organic farming more attractive for producers considering conversion.

It appears that a promotion campaign carried out in the past years with support from the EU is beginning to show effect, and it may be assumed that the positive signals the market showed in 2013 will continue.

FURTHER INFORMATION

- Organic Eprints for the UK: www.orgprints.org/view/projects/uk.html

For other relevant websites, see the section on key sector institutions.

ENDNOTES

1 Please note that in some cases data in the country reports may differ from data presented in Chapter 5 partly due to different data sources and classifications. The previous exercise was conducted in 1999, funded by the European Commission's Information measure relating to the Common Agricultural Policy (CAP). These reports can be found at: www.organic –europe.net

1a Elisabeth Klingbacher, Research Institute of Organic Agriculture (FiBL), elisabeth.klingbacher@fibl.org, www.fibl.org

2 Area and operator data: Austrian Ministry of Life (*Lebensministerium);* market data: Organic Retailers Association (ORA).

3 Top-selling products: *Agrarmarkt Austria* www.ama-marketing.at/home/groups/4/Charts_Bioaktionstage_2013.pdf; Market channels: Organic Retailers Association (ORA).

4 Organic agricultural policy is under the competency of the Flemish and Walloon regions. Therefore most information is regional in nature.

5 Paul Verbeke, BioForum Vlaanderen, paul.verbeke@bioforumvl.be, www.bioforumvl.be

6 Area data: Departement Landbouw en Visserij and Eurostat; market data: GFK survey on products sold on the domestic market. Provided by Departement Landbouw en Visserij

7 Stoilko Apostolov, Bioselena, headoffice@bioselena.com, www.bioselena.com

8 Area and operator data: Ministry of Agriculture Bulgaria; market data: Bioselena.

9 More information available at: www.mzh.government.bg/MZH/en/ShortLinks/BiologichnoZemedelie.aspx

10 Darko Znaor, Independent Consultant, darko@znaor.eu

11 Area and operator data: Ministry of Agriculture; market data: Darko Znaor.

12 More information available at: www.greeneuropeanjournal.eu/sustainable-agriculture-as-a-path-to-prosperity-for-the-western-balkans

13 Andrea Hrabalová, Institute of Agricultural Economics and Information (IAEI), hrabalova.andrea@uzei.cz, www.uzei.cz

14 Data: Institute of Agricultural Economics and Information (IAEI).

15 More information available at: www.eagri.cz/public/web/mze/zemedelstvi/ekologicke-zemedelstvi/akcni-plan

16 More information available at: www.eagri.cz/public/web/file/186838/Rocenka_EZ_2011_web.pdf

17 Tomas Fibiger Norfelt, Knowledge Centre For Agriculture, tfn@vlf.dk, www.daas.dk

18 Area and operator data Eurostat; domestic market data: Danish Agriculture and Food Council (LF), based on data from Statistics Denmark and Organic Denmark. Provided by Eijvind Pedersen (LF); export and import data: Statistics Denmark

19 In 2012, EUR 1 = DKK 7.4610, according the European Central Bank.

20 More information available at: www.fvm.dk; Danish AgriFish Agency: www.naturerhverv.dk.

21 More information available at: fvm.dk/landbrug/indsatsomraader/oekologi/oekologisk-handlingsplan-2020.

22 Merit Mikk, Centre for Ecological Engineering (CEET)/Estonian Organic Farming Foundation (EOFF), merit.mikk@gmail.com, www.maheklubi.ee
23 Area data: Agricultural Board, Organic Agriculture Department; market data: TNS Emor and Centre for Ecological Engineering estimates.
24 Sampsa Heinonen, Senior Officer, M.Sc. (Agr.), The Finnish Food Safety Authority *Evira*, sampsa.heinonen@evira.fi , www.evira.fi
25 Area and operator data: Evira and Eurostat; market data: Pro Luomu.
26 In addition to the agricultural land, there are 7 million hectares of wild collection areas.
27 Elisabeth Mercier, Agence Française pour le Développement et la Promotion de l'Agriculture Biologique (Agence BIO), contact@agencebio.org, www.agencebio.org
28 Data: Agence Bio
29 Diana Schaack, *Agrarmarkt Informations-Gesellschaft* (AMI), info@ami-informiert.de, www.ami-informiert.de
30 Helga Willer, Research Institute of Organic Agriculture (FiBL), helga.willer@fibl.org, www.fibl.org
31 Area and operators data: Federal Agency for Food and Agriculture (BLE) and Eurostat; market data: (AMI)
32 Please note that the monetary values are actually higher than indicated here, as not the total organic market is covered with the current survey methods.
33 Nicolette van der Smissen, Agronomist, agrobio@otenet.gr
34 Area and operator data: Eurostat.
35 Zoltán Dezsény, Hungarian Research Institute of Organic Agriculture (ÖMKi), info@biokutatas.hu, www.biokutatas.hu
36 Dóra Drexler, Hungarian Research Institute of Organic Agriculture (ÖMKi), info@biokutatas.hu, www.biokutatas.hu
37 Area and operator data: Eurostat; market data: Biokorsar
38 In addition to the agricultural land, there are about 6000 hectares of aquaculture areas.
39 More information available at: www.kormany.hu/download/7/64/e0000/MK_13_076%20mg.pdf and www.umvp.eu/sites/default/files/A%20jogszab%C3%A1ly%20mell%C3%A9kletei_15.pdf
40 More information available at: www.kormany.hu/download/a/49/90000/MR_2012_057_%28VI_21%29_VM_rendelet.pdf
41 Gunnar Á Gunnarsson, Vottunarstofan Tún ehf. (Tún), tun@tun.is, www.tun.is
42 Area and operator data: Tún
43 12 436 hectares are used for the collection of wild plants
44 Total 1 500 000 hectares available for agricultural uses, including grazing areas and the collection of wild plants
45 Grace Maher, Irish Organic Farmers & Growers Association, info@iofga.org; www.iofga.org
46 Area and operator data: Department of Agriculture and Food; market data: Bord Bia. Export and import data: IOFGA estimate.
47 Data: only members of IOFGA
48 Marta Romeo, Sistema d'Informazione Nazionale sull'Agricoltura Biologica – SINAB, www.sinab.it
49 Marie Reine Bteich, Istituto Agronomico Mediterraneo di Bari (IAM Bari), Centro Internazionale di Alti Studi Agronomici Mediterranei (CIHEAM), bteich@iamb.it, www.iamb.it
50 Area and operator data: SINAB and Eurostat; total for the domestic market and marketing channels: Nomisma based on Associazione nazionale delle imprese di trasformazione e distribuzione di prodotti biologici (AssoBio); export data: AssoBio
51 Data: Associazione nazionale delle imprese di trasformazione e distribuzione di prodotti biologici (AssoBio).
52 Gustavs Norkārklis, Association of Latvian Organic Agriculture, ekoprodukti@ekoprodukti.lv, www.lbla.lv
53 Area and operator data: Eurostat and Ministry of Agriculture
54 Klaus Büchel, Office for Agriculture and Environment, Liechtenstein, klaus.buechel@kba.li, www.kba.li
55 Data: Office for Agriculture and Environment
56 Virgilijus Skulskis, Lithuanian Institute of Agrarian Economics (LIAE), virgilijus.skulskis@laei.lt, www.laei.lt
57 Area and operator data: Eurostat.
58 Raymond Aendekerk, Research Institute of Organic Agriculture (IBLA), aendekerk@ibla.lu; www.ibla.lu
59 Data: ASTA, Eurostat and IBLA.
60 More information available at: www.ibla.lu and www.bioletzebuerg.lu.
61 Nataša Mirecki, Biotechnical Faculty, University of Montenegro, mirecki@t-com.me, www.btf.me
62 Area and operator data: Monteorganica.
63 Marian Blom, Bionext, blom@bionext.nl, www.bionext.nl
64 Area data: Eurostat; operators: SKAL; market data: Bionext; retail sales includes general and specialised retailers and catering/restaurants. However, not all channels are included. With direct sales included, the figure would be over EUR 1 billion in 2012.
65 This figure includes general and specialised retailers and catering/restaurants. However, not all channels are included. With direct sales included, the figure would be over EUR 1 billion in 2012.
66 Gerald Altena, Debio, gerald.altena@debio.no, www.debio.no
67 Area and operator data: Eurostat and Debio; market data: SLF
68 More information available at: www.efta.int/content/legal-texts/eea.
69 More information available at: www.regjeringen.no/upload/LMD/Vedlegg/Brosjyrer_veiledere_rapporter/Handlingsplan_okologisk_200109.pdf#search=økologisk handling-splan
70 Dorota Metera, Bioekspert, bioekspert@bioekspert.waw.pl, www.bioekspert.waw.pl

71 Area and operator data: Główny Inspektorat Jakości Handlowej Artykułów Rolno-Spożywczych, GIJHARS, Main Agriculture and Food Quality Inspection, www.ijhar-s.gov.pl. Please note that these data differ slightly from those provided by Eurostat; Retail sales: PortalSpozywczy at www.portalspozywczy.pl/owoce-warzywa/wiadomosci/ekspert-w-2015-r-wartosc-rynku-zywnosci-ekologicznej-wyniesie-ok-700-mln-zl,88832.html; Share of total market: PMR www.pmrpublications.com/press-releases/380/rynek-spozywczy-w-polsce-wart-230-mld-zl-w-2012-roku

72 Based on data from Eurostat.

73 More information available at: www.minrol.gov.pl/pol/Jakosc-zywnosci/Rolnictwo-ekologiczne/Rolnictwo-ekologiczne-w-Polsce.

74 Catarina Crisóstomo, Inter-professional Association for Organic Agriculture (INTERBIO), international@interbio.pt, www.interbio.pt

75 Area and operator data: Ministry of Agriculture; market data: Interbio

76 Boldizsár Megyesi, Hétfa Research Institute and Hungarian Academy of Sciences, Research Centre for Social Studies (HAS-RCSS), megyesiboldizsar@hetfa.hu. www.hetfa.hu.

77 Area and operator data: Eurostat , Ministry of Agriculture MADR Romania; Market data: BCG-Global Advisors (2013) Romanian Organic Sector – Business Insight Booklet. The data were collected for work on the institutional development of organic agriculture in Romania, financed by the Bulgarian-Swiss Research Programme (BSRP) of the Swiss National Science Foundation (SNSF), project *Addressing socio-economic regional disparities: the potential of organic farming for strengthening rural areas in Bulgaria* (IZEBZO_142974).

78 In addition there are 1 082 138 hectares of wild collection areas.

79 More information available from: BCG-Global Advisors (2013)

80 Jelena Milić, Ministry of Agriculture, Forestry and Water Management, jelena.milic@minpolj.gov.rs, www.minpolj.gov.rs

81 Data: Department for Organic Production

82 Anamarija Slabe, Institute for Sustainable Development (ISD), anamarija.slabe@itr.si, www.itr.si

83 Area and operator data: Ministry for Agriculture market data: research projects and ISD estimates.

84 More information available at: www.mko.gov.si/si/zakonodaja_in_dokumenti/veljavni_predpisi/kmetijstvo/#c18905

85 More information available at: www.itr.si/uploads/ov/vp/ovvpWjVS2ACOt3JXY0SoDw/ANEK_si.pdf and www.mko.gov.si/fileadmin/mko.gov.si/pageuploads/podrocja/Kmetijstvo/Ekolosko_kmetijstvo/ANEK_slo.pdf

86 Victor Gonzálvez, SEAE, Spanish Society of Organic Agriculture (Sociedad Española de Agricultura Ecológica), Spain, vgonzalvez@agroecologia.net; www.agroecologia.net

87 Data: Ministry of Agriculture (MAGRAMA)

88 If the wild collection areas are included total land under organic certification is 1 845 039 hectares.

89 Johan Cejie, KRAV, info@krav.se, www.krav.se

90 Area and operator data: Eurostat, market data: Statistics Sweden (SBC).

91 Helga Willer, Research Institute of Organic Agriculture (FiBL), helga.willer@fibl.org, www.fibl.org

92 Area and operator data: FiBL; market data: Bio Suisse.

93 More information available at: www.admin.ch/opc/de/classified-compilation/19970385/201301010000/910.18.pdf

94 Uygun Aksoy, Ege University Faculty of Agriculture (EUFA), uygun.aksoy@ege.edu.tr; uygun.aksoy@gmail.com; www.agri.ege.edu.tr.

95 Area and operator data: MoFAL.

96 In 2012, EUR 1 was worth TRY 2.3551 (annual exchange rate according to the European Central Bank).

97 Susanne Padel, The Organic Research Centre Elm Farm, susanne.p@organicresearchcentre.com, www.organicresearchcentre.com

98 Area and operator data: Eurostat, Defra; market data: Soil Association

99 More information available at: www.coreorganic2.org

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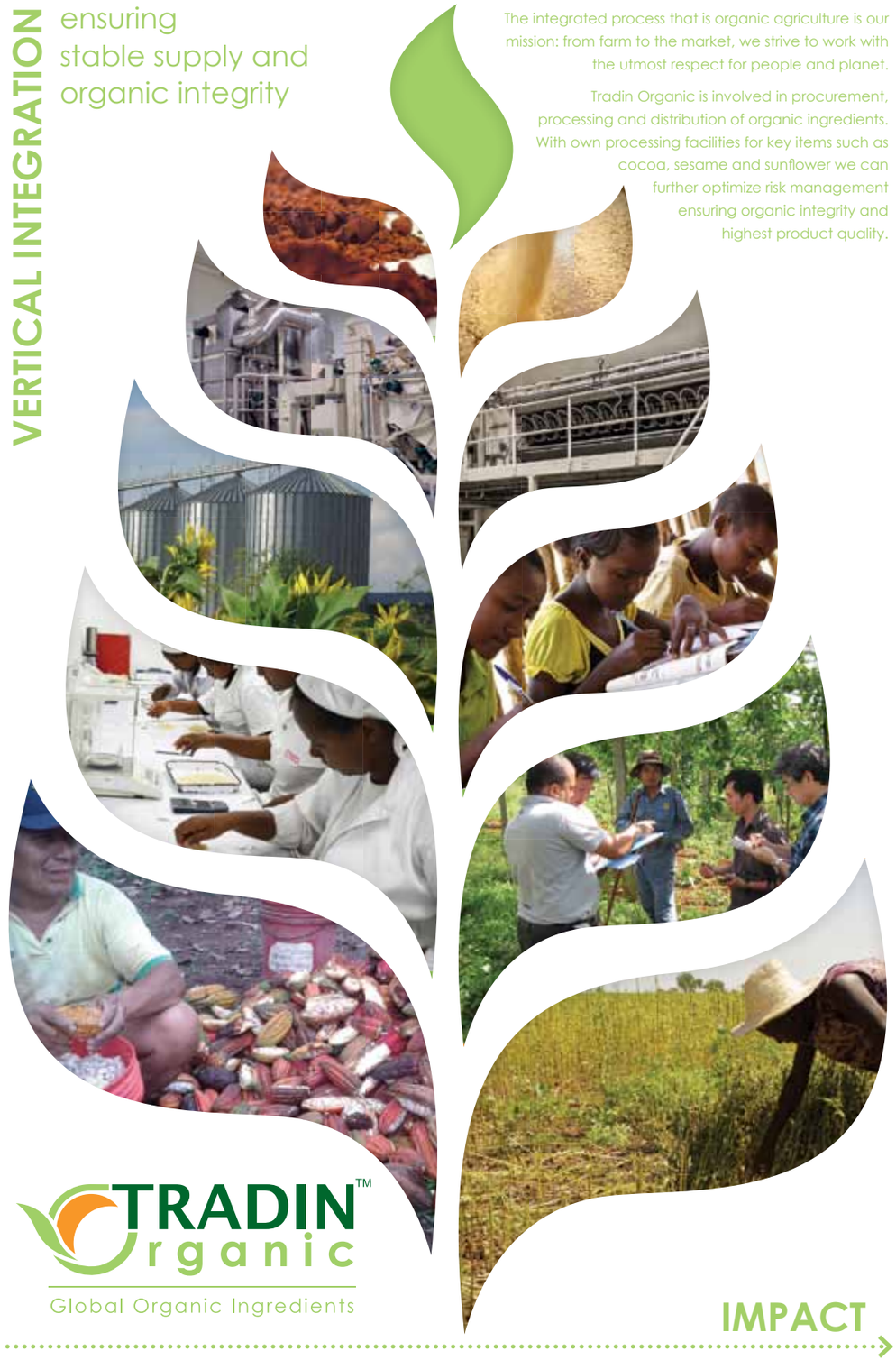

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