Development of Organic Food Production in some European Countries

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Contents

• What, how and why?
• Comparisons of eight countries
• Characteristics and special national features
• Conclusions
What, why and how?

• Ordered by the Finnish Ministry of Agriculture
• To draw a general picture of the development and the main factors behind it in eight different European countries
• Special attention was paid to measures most effective
• Main data: statistics published by Eurostat and Faostat, literature and interviews of some experts
• Countries: Austria, Danmark, Estonia, France, Germany, Finland, Norway, Sweden
• Research group: Niina Kuuva, Jaakko Nuutila, Pirjo Siiskonen
Comparing eight countries in production, processing, consumption and subsidies
Kuvio 7. Vertailumaiden luomu- alan osuus EU-28 maiden luomun kokonaispinta-alasta (%) (luomu- tuotannossa ja siirtymäväikeessa olevat) (Meredith & Willer, 2016)
### Taulukko 3. Vertailumaiden tunnuslukuja luomusta vuosilta 2013, 2014 ja 2015 (Eurostat, 2016; Meredith & Willer, 2016)

<table>
<thead>
<tr>
<th></th>
<th>Suomi</th>
<th>Ruotsi</th>
<th>Norja</th>
<th>Tanska</th>
<th>Viro</th>
<th>Itävalta</th>
<th>Saksa</th>
<th>Ranska</th>
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<tbody>
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<td>4,8</td>
<td>6,3</td>
<td>15,7</td>
<td>20</td>
<td>6,3</td>
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<tr>
<td>(Siirryneet ja siirtymä-</td>
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<td>kausi) 2015 (%)</td>
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<tr>
<td>Tuotantoala (Mha)</td>
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<td>0,52</td>
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<td>1,06</td>
<td>1,36</td>
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<tr>
<td>(Siirryneet ja siirtymä-</td>
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<td>kausi) 2015</td>
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<td>Luomutilojen osuus 2013</td>
<td>7,4</td>
<td>7,8</td>
<td>5,2</td>
<td>5,7</td>
<td>8</td>
<td>14,8</td>
<td>6,3</td>
<td>4,8</td>
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<td>(%)</td>
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<tr>
<td>Keskimääräinen tilakoko</td>
<td>42/49</td>
<td>45/88</td>
<td>23/21</td>
<td>67/79</td>
<td>50/100</td>
<td>19/23</td>
<td>59/56</td>
<td>59/44</td>
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<td>tavanomainen / luomu,</td>
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<td>2013 (ha)</td>
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<tr>
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<td>2,589</td>
<td>1,553</td>
<td>21,863</td>
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<td>2014</td>
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<td>531</td>
<td>787</td>
<td>351</td>
<td>633</td>
<td>110</td>
<td>—</td>
<td>—</td>
<td>10,088</td>
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<tr>
<td>määrä 2014</td>
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<td>912</td>
<td>22</td>
<td>1,065</td>
<td>7,910</td>
<td>4,830</td>
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<tr>
<td>2014 M€</td>
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<td></td>
<td></td>
<td>(2011)</td>
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<td></td>
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<tr>
<td>Osuus koko elintarvike-</td>
<td>1,7</td>
<td>6,0</td>
<td>1,5</td>
<td>7,6</td>
<td>1,6</td>
<td>6,5</td>
<td>4,4</td>
<td>2,5</td>
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<tr>
<td>markkinoista 2014 (%)</td>
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<td>(2011)</td>
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<tr>
<td>Kulutus / asuas 2014 (€)</td>
<td>41,3</td>
<td>145,4</td>
<td>54,4</td>
<td>162,1</td>
<td>16,9</td>
<td>127,0</td>
<td>96,6</td>
<td>74,3</td>
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Kuvio 8. Luomupeltoalan (tuotannossa ja siirtymävaiheessa olevan tuotantoa yhteensä) kehitys selvityksen kohteenä olevissa maissa vuodesta 1997 vuoteen 2014 (ha) (Eurostat, 2016)
<table>
<thead>
<tr>
<th>Maa</th>
<th>Aikaväli</th>
<th>Aiempien ohjelmien määrä</th>
<th>Ensimmäisen ohjelman julkistus</th>
<th>Luomun osuus pelto-alasta</th>
<th>Luomun osuus markkinoista</th>
<th>Tavoitevuosi</th>
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</thead>
<tbody>
<tr>
<td>Itävalta</td>
<td>2011-2013</td>
<td>4</td>
<td></td>
<td>20 %</td>
<td></td>
<td>2013</td>
</tr>
<tr>
<td>Norja</td>
<td>2009-2020</td>
<td>0</td>
<td>2009</td>
<td>15 %</td>
<td>15 %</td>
<td>2020</td>
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<tr>
<td>Ranska</td>
<td>2013-2017</td>
<td>2</td>
<td>2008</td>
<td>n. 8 %</td>
<td></td>
<td>2012</td>
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<tr>
<td>Ruotsi</td>
<td>0</td>
<td>1</td>
<td>1996</td>
<td>20 %</td>
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<td>2014</td>
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<tr>
<td>Saksa</td>
<td>2002 läht.</td>
<td>0</td>
<td>2002</td>
<td>20 %</td>
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<td>pitkä aikaväli</td>
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<tr>
<td>Suomi</td>
<td>2013-2020</td>
<td>1</td>
<td>2013</td>
<td>20 %</td>
<td></td>
<td>2020</td>
</tr>
<tr>
<td>Tanska</td>
<td>2012-2020</td>
<td>2</td>
<td>1995</td>
<td>n. 15 %</td>
<td></td>
<td>2020</td>
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<tr>
<td>Viro</td>
<td>2014-2020</td>
<td>1</td>
<td>2007</td>
<td>n. 20 %</td>
<td></td>
<td>2020</td>
</tr>
</tbody>
</table>
National features and characteristics
Austria

- Leader in Europe
- 5th national program
- Reached 20% of the field area in 2015 (target year 2010)
- 15% of farms
- Medium size 23 ha (conventional 19 ha)
- Highest national subsidice-level (285 e/ha) and special subsidices for vegetable production (450-600 e/ha)
- Share of organics of food markets 6%
- Research is supporting the production increase
Danmark

- Consumption 162 e/person/2014
- Share on food markets 7.6%
- Share of organic milk products 24%
- 6.3% of the field area
- 5.7% of all farms
- Medium size 79 ha (conventional 67 ha)
- National subsidies at low level
- 1987 national laws for organic food production
- Research and ICROFS (2008) have a central role in national development work
- Public catering has an important role: target 60% of all food in 2020
Estonia

- 15.7% of the field area
- 8% of farms
- Medium size 100 ha (conventional 50 ha)
- 1.6% of the food market
- Consumption 17 €/person/y
- National subsidies for vegetables, fruits and berries (350 €/ha)
- Careful national program 2014-2020
France

- 1/10 of all organic field area in Europe
- 4.9% of field area in France
- 4.8% of farms
- Medium size 44 ha (conventional 59 ha)
- 2.5% of food markets
- Strong positive development since 2008 (1. national program)
- Special subsidies: vegetables, fruits, olivs ja grapes
- Research and development activities co-operate
Finland

- 10% of the field area
- 7.4% of all farms
- Medium size 49 ha (conventional 42 ha)
- 2% of the food markets, 73 €/person/y
- Special national subsidies for vegetables
- National program in 2013
- Conventional lähiruoka “almost organic”
- Both consumption and production are increasing
Germany

- Almost 1/10 organic field area in Europe
- 6.3% of the field area in Germany
- 8.2% of farms
- Medium size 56 ha (conventional 59 ha)
- 4.4% of the food market
- National subsidies for grapes and others
- All agricultural universities have research and educational programs in organics
- Network of demo farms (200 farms) paid by the ministry
- Ökolandbau-program ja netpages to deliver information
Norway

- 4.8% of the field area
- 5.2% of farms
- Medium size 21 ha (coventional 23 ha)
- 1.5% of food markets
- National program 2009-2020 target 15% of the field area and consumption
- National food production has a label “almost organic”
Sweden

- Strong positive development since 2006
- 17.1% of the field area
- 7.8% of farms
- Medium size 88 ha (conventional 45 ha)
- 6% of the food markets
- Consumption 145 €/person/v 2014, is increasing
- Special subsidies for fruit and berry production, 830 €/ha
- Environmental programs in municipalities
- Research funding for organic agriculture
Conclusions
Conclusions 1

• It is possible to reach 20% of the field area (Austria, Estonia, Sweden)
• Size of the farm is not decisive (Austria)
• It is possible to increase consumption of organic food by open information delivery and marketing (Austria, Danmark, Sweden, Germany)
• The role of public sector in increasing consumption is decisive (Danmark and Sweden)
• Production and consumption can be increased by national organic policy and subsidies (Austria, France and Germany)
Conclusions 2

- National programs ought to pay attention in addition to targets to the means (Estonia, Danmark, France)
- Research can have an important role to increase organic food production (Austria, Danmark, Germany)
- Price policy in processing food industry has strong effects on consumption (Arla in Sweden)
- Also small and family size processing units are possible (Danmark, France, Germany)
- It is possible to organize the certification on public or private base or by a combination of both
Conclusions 3

• Best practices to **increase production** are subsidies, national programs including both targets and means and co-operation between farmers and research.

• To **increase consumption** best methods are information delivery to consumers - especially when pesticide residues are found - but also marketing activities. Local municipality level programs to improve environments including organic food increase in public catering are effective.
Conclusions 4

• To **diversify the production** especially useful have been diversification of policy actions and national level decisions to pay more subsidies for plants and products, whose production ought to be increased.

• To **increase both production and consumption** price policy is effective.
Thank you very much for your attention!

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