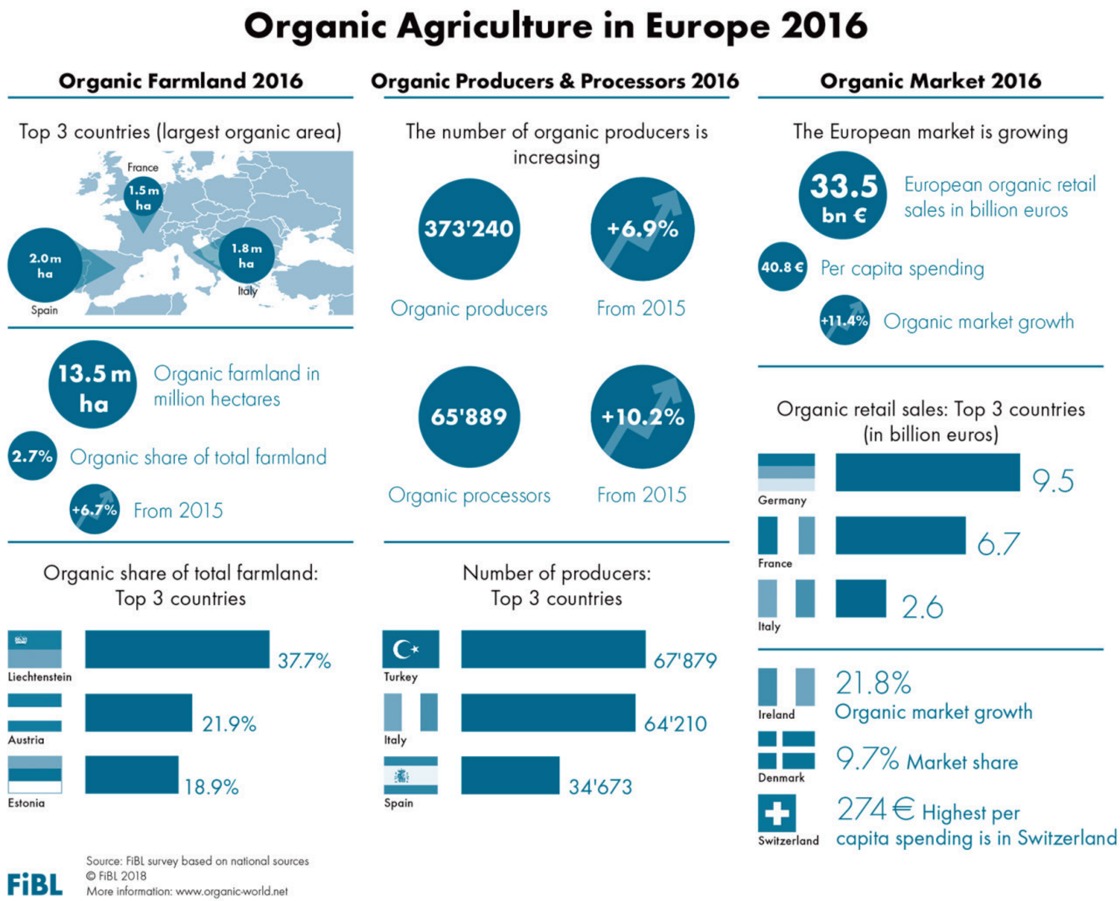
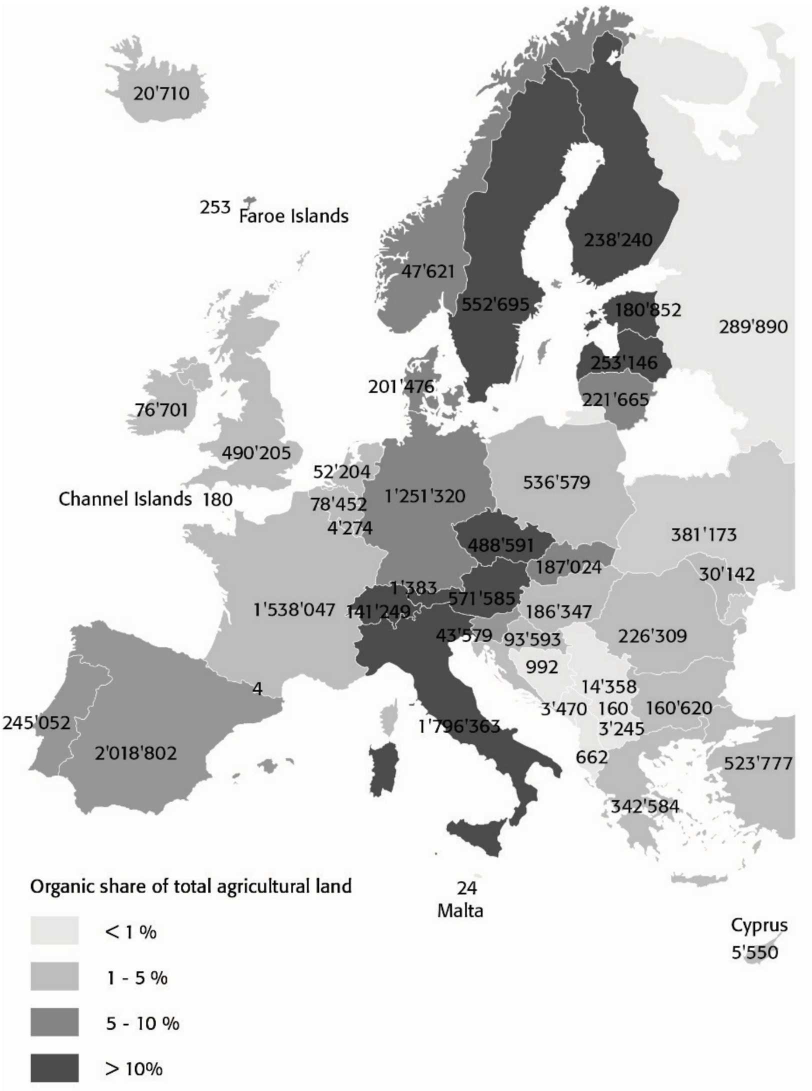


Infographic 5: Organic agriculture in Europe: Key indicators 2016

Source: FiBL-AMI survey 2018

Europe



Map 4: Organic agricultural land in the countries of Europe 2016 (in hectares)

Source: FiBL-AMI survey 2018; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed data sources see annex, page 330.

Organic in Europe: Prospects and Developments

HELGA WILLER,[1] STEPHEN MEREDITH,[2] BRAM MOESKOPS,[3] AND EMANUELE BUSACCA[4]

In 2016/2017 the European organic food and farming sector continued to excel both in terms of organic production and market growth as well as the latest developments in European Union (EU) food and farming policy. Data for 2016 (for full data see page 218) shows the European organic food market recording significant growth – increasing by 11.4 percent (EU: 12.0 percent). At the same time, the organic sector faces a number of challenges, notably that the growth rates in organic production continue to lag behind the dynamic growth seen within the organic food market (Figure 68). In the public policy arena at the EU level, there are some opportunities for the organic sector to capitalise on the growing awareness and interest in tackling sustainability concerns in the agri-food sector amongst policymakers, but there are also challenges. These prospects and developments for organic in Europe are explored in this chapter.

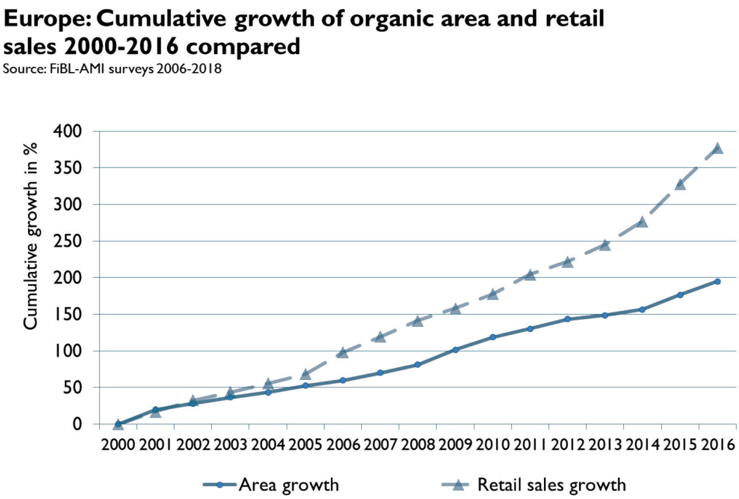


Figure 68: Europe and the European Union: Cumulative growth of organic farmland and retail sales compared 2000-2016

Source: FiBL-AMI surveys 2006-2018

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EU policy and regulatory framework for the organic sector

The EU policy and regulatory framework continues to influence the development of organic food and farming across Europe with some notable developments in 2017.

Negotiations on the EU organic rules start to draw to a close

In 2017, EU negotiations on the review of the EU organic regulation started to draw to a close, four years after the European Commission launched its legislative proposals. The basic text has been approved, and will contain some changes to the rules on production, controls, and imports. Some of these include:

Production
- the scope of organically certified products has been enlarged to include products such as cotton, wool, hides but also sea salt and other salts for food and feed;
- the use of “heterogeneous” plant reproductive material will be allowed;
- food containing or consisting of engineered nanomaterial will be excluded.

Controls
- Operators, who sell pre-packed organic products, will be exempt from notification and certification for distribution. Operators that sell small amounts of unpacked organic products may also be exempt from certification for distribution.
- All operators will be subject to a physical on the spot inspection at least once a year. However, operators, for which previous controls have not revealed any non-compliance affecting the integrity of organic products during the last three years, and operators, which are considered as presenting a low likelihood of non-compliance, can be verified every 24 months.

Imports
- The import regime will be based on two systems with a transitional period considered for the current systems. The new system will only include Trade Agreements with Third Countries and the recognition of Control Bodies/Authorities for the purpose of compliance.
- The European Commission will have the possibility to grant specific authorisations for the use of products and substances in third countries and outermost regions of the Union, taking into account differences in the ecological balance in plant or animal production, specific climatic conditions, traditions and local conditions in these areas. Such specific authorisations may be granted for a renewable period of two years.

The new EU organic regulation will apply from 2021. It will be accompanied by more detailed requirements, which will be discussed by relevant EU institutions and subsequently, adopted over the next two years. Although many of the recommendations of the organic sector were taken up in the final text, IFOAM EU considers that the current basic text is still far from ideal. It therefore called on the EU

Institutions to address the important weaknesses that still exist to ensure the long-term development of the organic sector in Europe (IFOAM EU, 2017a).

Debate about the future of the Common Agricultural Policy kicks-off

Discussions on the direction of the future of the Common Agricultural Policy (CAP) Post-2020 officially kicked-off in February 2017 with the launch of a public consultation by the Commission. This culminated in the publication of a Commission Communication on the Future of Food and Farming to the other EU Institutions, including the European Parliament and Council in November (European Commission, 2017a). The Communication draws on key results from the public consultation, which saw a majority of farmers and citizens expressing the need for agricultural policy to deliver more for the environment and climate change, and for farmers to continue to receive direct income support (ECORYS, 2017). In the document the Commission outlines its perspectives on the future direction of the CAP setting out three overarching objectives for the next reform:

- to foster a smart and resilient agricultural sector;
- to bolster environmental care and climate action and to contribute to the environmental and climate objectives of the EU;
- to strengthening the socio-economic fabric of rural areas.

The communication puts a strong emphasis on the establishment of a more results-based approach for the CAP, including a new delivery model which would place more responsibility on Member States to meet EU objectives and achieve specific targets. The Commission foresees Member States developing their individual "CAP strategic plans," with "realistic" and "adequate" targets agreed between the Commission and Member States. The overall direction of the Communication is grounded on the Commission's current outlook of moving the EU's budgetary spending across different sectors towards more results-based outcomes Post-2020.

Some aspects of the document were welcomed by the organic sector as offering some possibilities for improvement on the current policy. However, the Communication was seen by the organic sector to lack a clear and common EU approach to realise the Commission's wider intentions of shifting towards more sustainable growth models as part of next EU Budget reform. In particular, IFOAM EU highlighted that despite the increasing pressure for a more results-orientated CAP, no explicit link is made between the amount of income support farmers received an the contribution of their farm to delivering environmental and socio-economic outcomes. It also pointed out that the Commission's outlook does not decisively prioritise the growth of sustainable farming systems, such as organic farming (IFOAM EU, 2017b). In its vision for the CAP Post-2020, IFOAM EU has called for a new deal between farmers and citizens with the concept of public money for public goods. IFOAM EU maintains that while improvements to the CAP have been made over the past decades, sustainability is still not at the core of the policy, making it ill-equipped to address the wide range of economic, social and environmental challenges facing the agri-food sector. Based on this assessment, the group points to the need to orient future CAP payments towards rewarding and incentivising farmers willing to deliver a wide range of environmental and socio-economic benefits that are not fully taken into account by the majority of markets (IFOAM EU, 2017c).

Over the last decades, the CAP has been the key policy for the development of organic farming in Europe. Currently, Commission figures project that over 10 million hectares of farmland will be supported under the CAP 2014-2020 through the EU's national and regional rural development programmes. Current spending for organic conversion and maintenance payments accounts for 1.5 percent of EU agricultural spending for that period. In terms of future growth, these figures suggest that there are limited opportunities under the CAP to significantly increase the organic land area by 2020 in the majority of countries (Stolze et al. 2016). Indeed it is notable that despite dynamic growth in the European organic retail market and the public consultation results showing strong interest amongst respondents for organic farming to be a new objective of a modernised CAP, prospects for the development of the organic food and farming sector are largely ignored.

Discussions on the future of food and farming are also strongly linked to the debate on the future of the EU budget with the CAP representing about 40 percent of EU spending. Following the launch of a Reflection Paper on the future of EU finances by the Commission in June 2017 (European Commission, 2017b), these discussions are already in full swing with both legislative proposals of the Budget and the CAP expected in the second half of 2018.

This along with a new European Commission and Parliament in 2019 means that the next years will be a critical period for the organic sector to work with policymakers and other agri-food stakeholders to use the debate on the future CAP as a means to decisively support the development of organic food and farming in Europe.

Research

Organic farming research is funded under national research programs or national organic action plans as well as through European programmes.[1] Several organic farming research projects have been funded under the EU framework programmes since the mid-1990s. So far, the following projects in the current framework programme (Horizon 2020), focussing on organic agriculture have started: OK-Net Arable, OK-Net EcoFeed (see more information below), and LIVESEED (organic seed and plant breeding). RELACS, which will investigate alternatives for contentious inputs used in organic farming, will start in spring 2018. A new project addressing animal welfare in organic farming is expected to start in 2019.

Under CORE Organic, a new call for projects was launched in 2016. CORE Organic was initiated as a part of the Commission's ERA-NET Scheme in 2004. It intends to step up cooperation between national research activities and aims to enhance the

[1] For a list of organic farming research projects funded by the European Commission, see http://www.organic-research.org/european-projects.html

quality, relevance, and utilisation of European research resources through coordination and collaboration.

OK-Net platforms for farmers to exchange knowledge

In October 2016, the Horizon 2020-funded "OK-Net Arable" project launched the new knowledge platform farmknowledge.org, which aims to promote the exchange of information and share practical solutions among farmers across Europe. The platform is available in ten languages, and the solutions are divided according to the most relevant topics in organic arable farming: soil quality and fertility, nutrient management, pest and disease control, weed management, and solutions for specific crops. Within a new European-funded project, "OK-Net Ecofeed", the platform will now be expanded to cover tools and solutions related to organic feed for pigs and poultry.

National and international meetings of farmers, researchers, and other actors in the sector for knowledge exchange have been gaining in importance in recent years. The French "Tech and Bio" and the Swiss organic arable day ("Bioackerbautag") have taken place for several years now. A similar event took place in 2017 in Germany: In June 2017, more than 8000 visitors attended the first nationwide Organic Field Days near Kassel in the centre of Germany. More than 200 companies, associations, and organisations presented what they have to offer in the organic agriculture arena. Most exhibitors were from the sectors of agricultural engineering, inputs, and seeds/vegetative propagation material. Eleven additional categories ranging from consultancy to research and certification all the way to animal husbandry and marketing were present. The Organic Field Days provided information about how organic farms can further develop. Central themes were organic breeding, nutrient management, and reduced tillage, as well as agriculture and nature conservation.

Science Day 2017 at Biofach

On February 17, 2017, the fifth Science Day took place at BIOFACH, the World Organic Trade Fair, in Nuremberg, Germany. It was a joint event of TIPI, IFOAM's Technology Innovation Platform and TP Organics, the European Technology Platform for Organic Food and Farming. The morning session was devoted to the review of TP Organics' achievements in the wake of its 10th anniversary and the development of a new long-term strategy. The participants had the chance to put forward their priorities for TP Organics' advocacy work and suggestions for improving services for members. The outcomes of the workshop were taken as a basis to develop a new long-term strategy for the platform which was presented at the Organic Innovation Days (see below). TIPI organized the afternoon session, which focussed on identifying the research gaps in organic food and farming systems in the context of international cooperation. Participants suggested several simple and cost-efficient tools to follow up on the ideas expressed at the event (TIPI 2017).

TP Organics

On 15-17 November, 2017, the third edition of the Organic Innovation Days was organised by TP Organics[1] in Brussels. The event gathered actors from the organic and conventional food and farming sectors as well as policy-makers to discuss the latest innovations in agriculture and food, in organic food and farming and beyond. The 2017 edition included the final conference of the Horizon 2020 project OK-Net Arable. Best practices to improve yields in organic farming were presented, followed by a discussion on knowledge exchange and innovation support in organic farming.

At the event, TP Organics launched its position paper "Research and Innovation for Sustainable Food and Farming" outlining what it would like to see in terms of the 9th EU Research & Innovation Framework Programme (FP9), which will start in 2021. TP Organics calls for the UN Sustainable Development Goals to be the basis for the next Framework Programme's architecture. FP9 should feature a mission for the transformation of the European food and farming system towards more sustainability with at least 50 percent of EU agricultural land managed according to organic and agroecological principles by 2030. Furthermore, 10 percent of the total budget for agricultural research should be dedicated to the organic sector.

FiBL Europe

In July 2017, FiBL Europe was founded in Brussels as an umbrella organisation representing the five national institutes of the Research Institute of Organic Agriculture FiBL. Currently, FiBL Europe works on themes such as a European input list as well as the OrganicXSeeds database for organic seeds and propagation materials.

Organic Roadmap for Sustainable Food and Farming

The latest production and market trends and policy developments at the EU level demonstrate the important role that organic food and farming continues to play in helping to move European food and farming in a more sustainable direction both as an economic actor and as part of a wider social movement. As part of these efforts, the "Organic Roadmap to Sustainable Food and Farming Systems in Europe" by IFOAM EU was presented at the 11th European Organic Congress in September 2017 in Tallin, Estonia (IFOAM EU, 2017d). It sets out pathways for how the organic movement, other farming actors and policymakers can reach the Organic Vision 2030 (IFOAM EU, 2015) across three cross-cutting themes: "Organic on every table," "Improve, inspire and deliver," and "Fair play - fair pay." The roadmap serves as an invitation to all agri-food actors to engage with the organic sector to actively transform food and farming in their day to day work in Europe and beyond. The launch of the roadmap was also accompanied by the establishment of a new online platform, EUORGANIC2030.bio, to promote new and exciting initiatives which can support the Organic Vision 2030.

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[1] TP Organics is the European Technology Platform for organic food and farming. More information is available on tporganics.eu

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- ec.europa.eu/agriculture/organic/index_en: European Commission's organic farming website
- ifoam-eu.org: International Federation of Organic Agriculture Movements EU - IFOAM EU
- organic-market.info: Market News and updates: www.organic-market.info
- tipi.ifoam.org: Technology Innovation Platform of IFOAM (TIPI)
- tporganics.eu: European Technology Platform TP Organics
- www.ok-net-arable.eu*: OK-Arable Net*
- www.liveseed.eu: LIVESEED

Europe and the European Union: Key indicators 2016

Table 52: Europe and the European Union: Key indicators 2016

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland in hectares	13.5 million ha	12.1 million ha	Spain (2.0 million ha) Italy (1.8 million ha) France (1.5 million ha)
Organic share of total farmland	2.7 %	6.7 %	Liechtenstein (37.7%) Austria (21.9%) Estonia (18.9%)
Increase of organic farmland 2015-2016 in hectares	845'232 ha	912'746 ha	Italy (+303'071.0 ha) France (+215'845 ha) Germany (+162'482 ha)
Relative increase of organic farmland 2015-2016	6.7%	8.2%	Iceland (+ 132%) Bosnia and Herzegovina (+72%) Macedonia, FYROM (+49%)
Land use [in million hectares]	Arable crops: 6.0 Permanent crops: 1.5 Permanent pastures: 5.6	Arable crops: 5.2 Permanent crops 1.3 Permanent pastures: 5.5	
Top arable crops	Cereals: 2.3 million ha; Green fodder: 2.3 million ha Dry pules: 0.4 million ha	Green fodder: 2.1 million ha Cereals:1.9 million ha Dry pules: 0.4 million ha	Largest arable areas: France (0.8 million ha) Italy (0.8 million ha) Germany (0.5 million ha)
Top permanent crops	Olives: 0.6 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.3 million ha Nuts: 0.2 million ha	Largest permanent crop areas: Spain (0.5 million ha) Italy (0.4 million ha) Turkey (0.2 million ha)
Wild collection area	16.7 million ha	14.3 million ha	Finland (11.6 million ha) Romania (1.8 million ha; 2014) Bulgaria: (0.9 million ha)
Producers [no.]	373'240	295'123	Turkey: (67'879) Italy (64'210) Spain (34'673)
Processors [no.]	65'889	62'652	Italy (16'578) Germany (14'501) France (12'826)
Importers [no.]	4'657	3'968	Germany (1'598) Switzerland (501) Netherlands (364)
Retail sales	33.5 billion euros	30.7 billion euros	Germany (9'478 million euros) France (6'736 million euros) Italy (2'644 million euros)
Growth of retail sales 2015-2016	11.4%	12.0%	France, Ireland (22 %) Denmark (20 %)
Organic share of total market	No data	No data	Denmark (9.7 %) Luxembourg (8.6%) Switzerland (8.4 %)
Per capita consumption [euros]	40.8 euros	60.5 euros	Switzerland (274 euros); Denmark (227 euros) Sweden (197 euros)

Source: FiBL-AMI survey 2018.
For detailed data sources see annex.