Organic in Europe: Recent Developments

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The year 2020 with the COVID-19 crisis was a special year for the organic sector. While the consolidated data for 2019 show a continued growth trend for both organic production and market, in 2020 the market grew considerably faster than in the previous years as consumers turned to health and wellness products and paid more attention to disease prevention.

For the UK, for instance, where annual growth rates had been at around 5 percent in recent years, growth was far higher in 2020. Should this trend continue through the post-pandemic times, it is bound to impact organic farmland growth, making it more likely that the European Commission's aim of achieving an organic area share of 25 percent by 2030 will be reached. Apart from strong consumer interest, political support measures including a good regulatory framework, adequate support under the CAP, action plans and support for research and knowledge building will be crucial to achieving this goal.

The latest data for Europe show that organic farmland has reached about 16.5 million hectares (EU: 14.6 million hectares) or a share of around 3.3 percent (EU: 8.1 percent). The European Union's organic farmland share is far higher than in most countries and regions of the world; globally, about 1.5 percent of the farmland is organic (72.3 million hectares in 2019).

The European Commission aims to reach 25 percent organic area share by 2030. Austria already reached this benchmark in 2019 (more than 26.1 percent of the farmland was organic) and two other Member States are very close to it: Estonia (22.3 percent) and Sweden (20.4 percent).

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EU: Growth of organic area and retails sales 2000-2019

Source: FiBL-AMI surveys 2009-2021

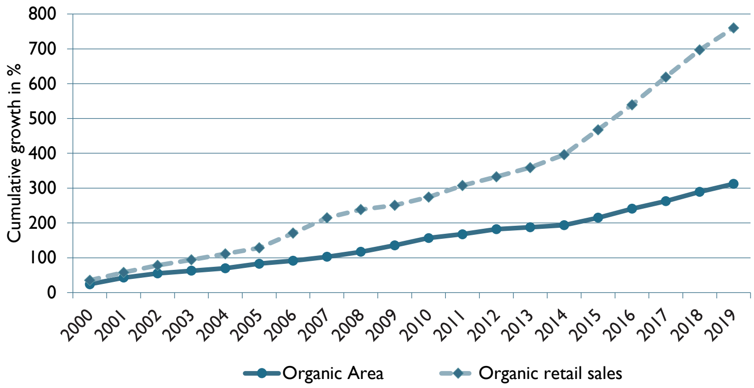

Figure 68: European Union: Growth of organic farmland and retail sales 2000-2019 compared

Source: FiBL-AMI surveys

In 2019, the organic market again grew faster than the organic area (Figure 68). Data shows that the EU organic food market increased to more than 41 billion euros or by 8 percent, whereas the farmland grew by 6 percent. While it is good to see strong market growth, the organic farmland area needs to continue to grow strongly as well to reach the 25 percent organic area share goal as set out by the European Commission (2020) in its Farm to Fork strategy.

New EU organic rules to be applied in 2022

In June 2018, the new European Union (EU) Regulation 2018/848[1] on production and labelling of organic products was published. The new EU organic regulation was initially set to apply from 01 January 2021. However, due to many reasons, including the COVID-19 pandemic, its application was postponed by one year to 01 January 2022[2]. The text that has been adopted in 2018 represents the "Basic Act". This means that many details of the text are being developed and adopted in the form of delegated and implementing acts. The development of secondary legislation started in June 2018 and should be concluded at the latest by June 2021, six months before the actual application of the new organic regulation. The final set of regulations will be composed of the Basic Act integrated by 15-18 delegated and implementing acts.

[1] Regulation (EU) 2018/848

[2] Regulation (EU) 2020/1693

Proposal for the Common Agricultural Policy post-2020 launched

In June 2018, the European Commission launched its proposal for the Common Agricultural Policy (CAP) for 2021 to 2027. As negotiations between the three European institutions got delayed, the new CAP will only enter into force in 2023, preceded by a two-year transition period.

The new CAP presents a New Delivery Model founded on a results-based approach, which gives more flexibility to Member States in the implementation of the policy objectives.

Organic farming can make a decisive contribution towards a sustainable food and farming sector while satisfying citizens' preferences. However, large-scale conversion to organic is only possible if the CAP's ambition is raised, allowing more farmers to make the necessary additional efforts and investments. With the right incentives in both pillars, many more farmers could make an even larger contribution to the environment, climate, and rural communities beyond 2020 (IFOAM EU, 2019).

The organic movement is concerned about the significant cuts foreseen to the second pillar, Rural Development, which so far has been providing crucial support to farmers for the conversion to organic and has helped them with maintenance payments. The second pillar should be strengthened, and more than 30 percent of its budget should be dedicated to the climate and environmental CAP objectives (IFOAM EU 2019).

As part of the new green architecture, the newly proposed eco-schemes offer a good opportunity to compensate farmers who want to do more for the climate and the environment. The schemes are 100 percent funded under the first pillar, which constitutes over three-quarters of the total CAP budget. However, essential elements are still missing: eco-schemes should be better defined to favour farming systems that contribute to multiple objectives, including organic farming. Moreover, a minimum of 30 percent of the first pillar should be dedicated to newly proposed eco-schemes.

Finally, the CAP's increased flexibility must be counterbalanced with strong common safeguards and a shared level of ambition. The organic movement defended ring-fencing of at least 70 percent of the entire CAP budget across both pillars, to ensure a level playing field and to avoid a race to the bottom for the climate and environment.

With the Green Deal (European Commission 2019c) and the publication of the Farm to Fork (European Commission 2020a) and Biodiversity strategies (European Commission 2020b) in May 2020, the Commission has put forward clear objectives for transitioning to sustainable food systems by 2030. But since the CAP will play a critical role in providing the means to reach these objectives, it is essential that the CAP – and its implementation at the national level through the National Strategic Plans – explicitly and fully contributes to the Green Deal's implementation and related strategies, which include the 'Farm to Fork strategy' and the ten priorities for the new EU Organic Action Plan to reach 25% organic land in Europe by 2030 (see subsequent chapter).

The European Green Deal & the Farm to Fork strategy: shaping a more sustainable EU agenda

The European Green Deal: A vision to climate neutrality for the EU by 2050

The European Green Deal (EGD, European Commission 2019c) is a new growth strategy unveiled by the European Commission in December 2019. The European Green Deal, one of the priorities of the Von der Leyen Commission (2019-2024), aims for Europe to be the first climate-neutral continent by becoming a modern, resource-efficient economy. Specifically, the EGD aims "to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use". Moreover, the EGD stresses that "the EU has the collective ability to transform its economy and society to put it on a more sustainable path".

The EGD covers several sectors in which the EU can do better in terms of sustainability, including the energy, the transport and the agri-food sector. For this publication, the focus is on the latter sector. The Farm to Fork (F2F) and the EU biodiversity strategies, both a part of the EGD, unveiled in May 2020, aim at achieving the EGD goals for the agri-food sector. The EU biodiversity strategy aims at "bringing nature back into our lives" with many initiatives including the proposal of EU nature restoration targets, the review and possible revision of the Environmental Crime Directive and building an EU Business for Biodiversity movement.

Some initiatives within the Farm to Fork and the EU biodiversity strategies overlap, e.g., the initiatives aim to boost organic and more sustainable practices. As the Farm to Fork strategy includes those initiatives and ambitions relevant to the whole (organic) food supply chain, this chapter will focus on this strategy.

Overview of the Farm to Fork (F2F) strategy

The F2F strategy, at the heart of the European Green Deal, "addresses comprehensively the challenges of sustainable food systems and recognises the inextricable links between healthy people, healthy societies and a healthy planet".

The F2F strategy is composed of a main communication and an annex, the latter serving as an action plan for the strategy. The strategy recognises that food systems are responsible for approximately 29 percent of the world's greenhouse gas (GHG) emissions and that nearly 70 percent of all agricultural GHG emissions come from the animal sector. It explicitly states that "there is an urgent need to reduce dependency on pesticides and antimicrobials, reduce the use of fertilisers, increase organic farming, improve animal welfare, and reverse biodiversity loss". The F2F is meant to lead a global transition towards competitive sustainability from farm to fork.

The goals of the F2F strategy are to:

– Ensure that food production, transport, distribution, marketing, and consumption have a neutral or positive environmental impact,
– Preserve and restore the land and sea-based resources,
– Mitigate climate change,

- Reverse the loss of biodiversity,
- Ensure food security, nutrition, and public health.

Notably, the F2F strategy is not legally binding, which means that adequate policies must support initiatives and targets contained therein. In the following section is an overview of how this would work for initiatives that directly impact organic. For the sake of succinctness, only those initiatives that directly impact organic are considered in this publication. Still, many more initiatives are included in the F2F strategy than only the ones hereafter.

Farm to Fork strategy & organic

Organic farming has a prominent place in the Farm to Fork strategy. Perhaps the most significant achievement for the organic sector is the recognition that organic can be part of the solution in addressing the environmental challenges we currently face, as the F2F strategy includes a target which aims at achieving **at least 25 percent of the EU's agricultural land under organic farming by 2030** and a significant increase in organic aquaculture. This 25 percent target will not be reached with a business as usual approach, or with only a few favourable policies here and there. To reach the 25 percent target, comprehensive policy support for organic is needed across the EU, aiming to increase the supply and demand for organic products.

As part of the F2F strategy, the Commission pledged to review the EU promotion programme for agricultural and food products to enhance its contribution to **sustainable production and consumption**. At the end of 2020, the Commission pledged a total of 182.9 million euros to promote European agri-food products, for example via campaigns in the internal market or third countries, with a focus on sustainable agriculture. The budget for campaigns about organic farming, EU sustainable agriculture, and the agri-food sector's role in terms of climate action and the environment accounts for about half of the total budget, i.e. 86 million euros.

Other F2F strategy initiatives that directly impact organic and that are yet to be carried out at the time of writing these lines are:

- The Commission will put forward an **Action Plan on organic farming**, expected at the beginning of 2021. In this context, push and pull measures that boost both organic production and demand are crucial.
- Determine the best modalities for setting minimum mandatory **criteria for sustainable food procurement** to promote healthy and sustainable diets, including organic products, in schools and public institutions (indicative timetable: Q3 2021).
- The Commission will take measures to facilitate the **registration of seed varieties,** including for organic farming, and to ensure easier market access for traditional and locally adapted varieties.

Research

Organic farming research is funded under national research programs or national organic action plans and European programmes. Since the mid-1990s, several organic farming research projects have been financed by the EU framework programmes. So far, the following projects focussing on organic agriculture have been funded by the current framework programme Horizon 2020:[1] OK-Net Arable, OK-Net EcoFeed, LIVESEED, ECOBREED, BRESOV (three projects on organic seed and plant breeding). RELACS and Organic-PLUS, which investigate alternatives for contentious inputs used in organic farming, started in spring 2018. In 2019, PPilow started as a new project addressing animal welfare in organic farming and a thematic network on organic fruit production, BioFruitNet.

In 2020, the CORE Organic network, which joins forces of the EU Member States to fund transnational research projects, released its 15-year activity report (2004-2019) (CORE Organic 2021), after celebrating its 15th anniversary in 2019. The current CORE Organic Cofund consortium[2] consists of 27 partners from 19 countries. In 2016, 12 projects were selected to run until 2021, distributed across four thematic areas: Plant production systems, animal feed, livestock systems, and organic food processing[3]. The report shows that CORE Organic has primarily achieved its mission to enhance the European research area on organic agriculture: The number of projects funded on topics identified as common priorities while ensuring the participation of SMEs and facilitating the integration of new forms of knowledge generation, innovation and dissemination has allowed the sector to better meet the demand for organic food and products and to develop practices per the organic principles and regulations. Collaboration with the European Technology Platform TP Organics and other relevant sector players has helped ensure that the voice of transnational organisations representing farmers, industry and civil society have been taken into account. With the Organic Eprints open access repository, a shared knowledge reservoir for effective dissemination of research outcomes has been created. The CORE Organic projects' outcomes are archived in Organic Eprints, which today has more than 24'000 entries (Willer/Rasmussen 2019).

Organic Farm Knowledge for farmers and advisers to exchange knowledge

In December 2018, the Horizon 2020-funded project OK-Net Ecofeed launched the extended knowledge platform Organic Farm Knowledge (https://organic-farmknowledge.org/), initially set up in the framework of OK-Net Arable. The platform aims to promote the exchange of information and share practical solutions among farmers across Europe. The platform is available in 14 languages. In 2019, the platform started to be expanded to cover tools and solutions related to organic feed for pigs and poultry and seed, breeding, and many other topics. In 2020, a concept note was developed as an overarching framework for further developing Organic Farm Knowledge, including an Action Plan outlining the main tasks, which is now being

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[1] https://ok-net-ecofeed.eu; www.liveseed.eu; http://ecobreed.eu; https://bresov.eu; https://relacs-project.eu; https://organic-plus.net; www.ppilow.eu; https://biofruitnet.eu/

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

[3] http://projects.au.dk/coreorganiccofund

implemented by the newly established Executive and Editorial Boards composed of 14 partners from across Europe. The goal is for the platform to become the European reference hub for practical knowledge on organic farming.

Science Day 2020 at Biofach

On 14 February, TP Organics' Science Day[1] took place at Biofach 2020 in Nuremberg, Germany on innovation opportunities for organic companies in the new research programme of the EU, Horizon Europe. TP Organics[2] is the European Technology Platform for Organic Food and Farming. Science Day was dedicated to the urgent need to address food and packaging waste, particularly plastic waste, to increase the sustainability of the (organic) food sector. The European Commission highlighted that support for organic and agroecology is seen as an important element to future-proof food and farming systems. Within the European Green Deal, the European Commission aims to address EU food systems' challenges along the whole value chain – from farm to fork. Improving packaging, reducing food loss and waste, and empowering consumers are on the agenda, among others. At least 35% of the funding under Horizon Europe will be dedicated to climate solutions, and €10 billion are expected to be available for Cluster 6, 'Food, bioeconomy, natural resources, agriculture and environment'.

TP Organics' new Strategic Research & Innovation Agenda for Organics & Agroecology (TP Organics 2019a) was presented, which identifies 29 research needs in four priority areas: (1) Moving organic further; (2) Redesigning food and agricultural policies; (3) Climate-resilient and diversified farming systems; and (4) Sustainable value chains for better food systems. The importance of meeting consumer demand for minimal processing and supporting innovations to reduce food and packaging waste was highlighted. The companies Bio4Pack and FUTAMURA presented their solutions for sustainable packaging. Closing the loop to a circular economy, bioplastics based on cellulose or organic waste are suitable for composting or recycling. The organic biscuit company SOMMER gave insights into its experience with bioplastic. While bioplastics display good barrier properties and do not reduce the products' shelf life, costs for materials and waste disposal are higher. For widespread use of bioplastic, consumers need to be educated on the right disposal; public waste management needs to adapt to the new material, and the real costs of fossil fuel-based packaging should be reflected in its price.

Organic Innovation Days

The first-ever online edition of the Organic Innovation Days[3], TP Organics' annual event that brings together the organic sector and policymakers at an EU level, took place on 24-25 November 2020, in cooperation with the EU H2020 project LIVESEED, which is coordinated by IFOAM Organics Europe. Through interactive functionalities, the

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[1] www.tporganics.eu/science-day-2020
[2] www.tporganics.eu
[3] www.tporganics.eu/organic-innovation-days

Organic Innovation Days once again provided a unique opportunity to discuss research needs and innovations within and outside the organic sector to transform our food systems together with a broad range of stakeholders – including companies and researchers, farmers and farmer organisations, and policymakers across Europe.

While LIVESEED held its final conference for stakeholders and policymakers and a European workshop presenting key project outcomes, innovations and results, TP Organics sessions focused on how the new EU research programme Horizon Europe can support the transformation towards sustainable food and farming systems by leveraging the potential of organic and agroecology. The European Commission showed that organic and agroecology already play a key role in many different European policies, including the Farm to Fork strategy. Horizon Europe will be a vital enabler of the European Green Deal. Still, instruments beyond research and innovation are needed to support the uptake of organic in a more holistic approach.

Horizon Europe

Horizon Europe, the EU's 9th Framework Programme for research and innovation, will provide a proposed budget of €100 billion for the period 2021-2027. The briefing published by TP Organics in 2019 (TP Organics 2019b) provides an overview of the programme, its structure and content, the policy process, and TP Organics position. The European Parliament and the EU Council reached a provisional agreement on Horizon Europe in Spring 2019. Following this agreement, the European Commission has begun the preparation of the first Strategic Plan. The Strategic Plan will identify missions and European Partnerships and serve to prepare the work programmes' content and calls for proposals for the first four years of Horizon Europe. The first work programme is expected by April 2021. €10 billion are to be allocated to Cluster 6, 'Food, Bioeconomy, Natural Resources, Agriculture and Environment'. Thanks to TP Organics, the legal texts of Horizon Europe state that Horizon Europe should support organic farming and agroecology, and the latest version of the draft Work Programme (from 21 December 2020) includes three calls that specifically address organic research needs: 'Fostering research in organic crop breeding', 'Innovative solutions to prevent adulteration of food-bearing quality labels: focus on organic food and geographical indication' and 'Reaching the Farm to Fork target: R&I scenarios for boosting organic farming and aquaculture in the EU'. In addition, 18 calls mention 'organic'.

TP Organics welcomes the planned Mission for Soil health and food as well as the partnership for 'Accelerating farming systems transition: agroecology living labs and research infrastructures', which will be crucial instruments to support the upscaling of organic farming and agroecology. However, TP Organics is concerned that the inclusion of the 'Innovation Principle' in Horizon Europe could be used to undermine the Precautionary Principle, and hence social and environmental protections in the EU[1]. Innovation is only useful if it does not harm public and environmental health.

20th Organic World Congress

Every three years, the organic sector comes together to host the world's largest organic gathering, the Organic World Congress (OWC). In 2021 initially planned for 2020, the 20th OWC will be held in Europe for the first time since 2008, and it will take place from 6 to 10 September in Rennes, France. Drawing from the motto, "From its Roots, Organic Inspires Life", OWC 2021 will aim to provide organic and likeminded stakeholders working toward sustainable agriculture, value chains, and consumption with an opportunity to exchange their knowledge, innovations, and experiences. In the days leading up to the congress, delegates have the opportunity to participate in one of eight, topic-specific pre-conferences, one of which will focus on organic farming statistics.

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[1] This tool was created by industry lobbyists to block and delay important social, health and environmental regulations. Despite several efforts by civil society organisations including TP Organics to remove the Innovation Principle from Horizon Europe, it is still part of the recitals. More information about this dangerous principle making its way into EU law is available at https://tporganics.eu/innovation-principle/

Europe and the European Union: Key indicators 2019

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland	16.5 million ha	14.6 million ha	Spain (2.4 million ha) France (2.2 million ha) Italy (2.0 million ha)
Organic share of total farmland	3.3 %	8.1 %	Liechtenstein (41.0%) Austria (26.1%) Estonia (22.3%)
Increase in organic farmland 2018-2019	0.92 million ha	0.82 million ha	France (+205'775 ha) Ukraine (+158'880 ha) Spain (+108'441 ha)
Relative increase in organic farmland 2018-2019	5.9%	5.9%	Kosovo: (+548 %) Bosnia and Herzegovina: (+89 %) Moldova: (+62 %)
Land use	Arable crops: 7.8 million ha Permanent crops: 1.8 million ha Permanent grassland: 6.5 million ha	Arable crops: 6.6 million ha Permanent crops 1.6 million ha Permanent grassland: 6.4 million ha	
Top arable crop groups	Green fodder: 2.6 million ha Cereals: 3.0 million ha Dry pulses: 0.7 million ha	Green fodder: 2.5 million ha Cereals: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.3 million ha) Italy (1.0 million ha) Germany (0.7 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.6 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	10.5 million ha	7.1 million ha	Finland (4.6 million ha) Romania (1.8 million ha; 2014) Belarus (1.5 million ha)
Producers	430'794	343'858	Turkey: (74'545) Italy (70'561) France (47'196)
Processors	81'719	78'240	Italy (21'940) France (19'311) Germany (16'162)
Importers	6'508	5'747	Germany (1'831) France (662) Switzerland (548)
Retail sales	45.0 billion euros	41.4 billion euros	Germany (11'970 million euros) France (11'295 million euros) Italy (3'625 million euros)
Growth of retail sales 2018-2019	8.0%	8.0%	France (13.4%) Estonia (13.2%) Belgium (11.7%)
Organic share of total market	No data	No data	Denmark (12.1 %) Switzerland (10.4 %) Austria (9.3 %)
Per capita consumption	56 euros	84 euros	Denmark (344 euros); Switzerland (338 euros) Luxembourg (265 euros)

Source: FiBL-AMI survey 2021.
For detailed data sources, see annex