ORGANIC IN EUROPE

PROSPECTS & DEVELOPMENTS
FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS
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FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

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‘Organic in Europe - Prospects and developments for organic in national CAP Strategic Plans’ highlights how much of the national CAP budgets will need to be dedicated to organic farming in all Member States to reach the EU Farm to Fork and Biodiversity Strategies’ average target of 25% organic land by 2030.

IFOAM Organics Europe presented this study at its General Assembly on 29 June 2021. The study visualises the efforts every country needs to put into place to reach their potential national targets, which should fairly contribute to the EU average 25% target.

In 2019, Europe had an organic land area of 9%, with average payments rates of €213.15/hectare. Only 64% of the certified organic area is currently receiving organic support payments, amounting to almost €2 billion of CAP support/year (Note: Average payment rate, percentage of certified area supported, and total spend are 2018 data).

Achieving 25% organic land in the EU by 2030 would require the EU to:
- Triple its organic land area between 2019 and 2030;
- Increase its overall CAP expenditure 3-5-fold by 2030;
- Dedicate 9-15% of the CAP budget to organic (instead of 3% as in 2018).

Achieving 25% organic land in the EU by 2030 would require Member States to:
- Increase payment rates per hectare before 2030 – to consider increases in costs since payments rates were last set in 2014;
- Some individual countries with low levels of support for organic farming would need to consider a 5-10-fold increase in expenditure to deliver realistic targets for their national organic land area.

According to IFOAM Organics Europe, Member States should introduce a national target for organic land in their CAP Strategic Plan, based on an analysis of the organic sector’s production needs, and of its contribution to the CAP, EU Green Deal, Farm to Fork and Biodiversity strategies’ objectives. The Commission should ensure that all CAP Strategic Plans include a target for organic land representing a fair contribution to the EU’s 25% target. Countries have different baselines and should have different targets, and Member States with already more than 25% organic land should also continue to develop organic farming. This is in line with the EU Organic Action Plan’s call for all Member States to set a target and national strategic plan for developing their organic sectors.

The document is commissioned from an independent researcher and provides readers with an overview for the EU and each Member State. On 27, and an EU country card, the following information is available:
- Key indicators of production, market, and CAP support;
- Scenarios for CAP expenditure and their effect on the 2030 organic area;
- An overview of the current CAP support payments;
- Information about a national organic action plan; and
- Other policy support measures impacting the organic land area.

‘Prospects & developments for organic in national CAP Strategic Plans’ and individual country cards are available on https://www.organicseurope.bio/library.
Below table provides you with an overview of the prospects and developments for organic in national CAP Strategic Plans for the European Union as well as each Member State. On the left, you can find the current share of organic land, followed by the current (2018) CAP support. The numbers in columns 'Corresponding CAP expenditure' refer to the minimum (least ambitious) and maximum (most ambitious) amounts a country could allocate to achieving the national/organic movement and enhanced scenarios detailed on the following country cards.

<table>
<thead>
<tr>
<th>Member State</th>
<th>Organic area share</th>
<th>Current (2018) CAP support (M€/year)</th>
<th>Potential organic area share</th>
<th>Corresponding CAP expenditure (M€/year)</th>
<th>Enhanced organic area share</th>
<th>Corresponding CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU-27</td>
<td>9.0%</td>
<td>1,803</td>
<td>21.1%</td>
<td>4,405/8,817</td>
<td>25.0%</td>
<td>5,193/10,394</td>
</tr>
<tr>
<td>AUSTRIA</td>
<td>25.1%</td>
<td>121</td>
<td>40%</td>
<td>202/313</td>
<td>47.2%</td>
<td>238/369</td>
</tr>
<tr>
<td>BELGIUM</td>
<td>6.9%</td>
<td>19</td>
<td>20.0%</td>
<td>59/82</td>
<td>23.6%</td>
<td>69/97</td>
</tr>
<tr>
<td>BULGARIA</td>
<td>2.6%</td>
<td>24</td>
<td>10.0%</td>
<td>84/199</td>
<td>11.8%</td>
<td>100/235</td>
</tr>
<tr>
<td>CROATIA</td>
<td>6.9%</td>
<td>33</td>
<td>15.0%</td>
<td>75/103</td>
<td>17.7%</td>
<td>89/121</td>
</tr>
<tr>
<td>CYPRUS</td>
<td>5.6%</td>
<td>4</td>
<td>10.0%</td>
<td>6.9/11.3</td>
<td>11.8%</td>
<td>8.1/13.3</td>
</tr>
<tr>
<td>CZECH REPUBLIC</td>
<td>15.7%</td>
<td>53</td>
<td>25.0%</td>
<td>88/113</td>
<td>29.5%</td>
<td>104/133</td>
</tr>
<tr>
<td>DENMARK</td>
<td>10.9%</td>
<td>41</td>
<td>25.0%</td>
<td>104/150</td>
<td>29.5%</td>
<td>123/178</td>
</tr>
<tr>
<td>ESTONIA</td>
<td>22.2%</td>
<td>18</td>
<td>30.0%</td>
<td>27/39</td>
<td>35.4%</td>
<td>31/46</td>
</tr>
<tr>
<td>FINLAND</td>
<td>14.0%</td>
<td>56</td>
<td>25.0%</td>
<td>104/141</td>
<td>29.5%</td>
<td>122/166</td>
</tr>
<tr>
<td>FRANCE</td>
<td>8.1%</td>
<td>180</td>
<td>25.0%</td>
<td>615/1,504</td>
<td>29.5%</td>
<td>726/1,776</td>
</tr>
<tr>
<td>GERMANY</td>
<td>9.7%</td>
<td>300</td>
<td>20.0%</td>
<td>704/1,091</td>
<td>23.6%</td>
<td>831/1,288</td>
</tr>
<tr>
<td>GREECE</td>
<td>11.6%</td>
<td>97</td>
<td>20.0%</td>
<td>179/444</td>
<td>23.6%</td>
<td>212/252</td>
</tr>
<tr>
<td>HUNGARY</td>
<td>6.5%</td>
<td>21</td>
<td>15.0%</td>
<td>72/163</td>
<td>17.7%</td>
<td>85/192</td>
</tr>
<tr>
<td>IRELAND</td>
<td>1.5%</td>
<td>8</td>
<td>12.0%</td>
<td>63/81</td>
<td>14.2%</td>
<td>75/96</td>
</tr>
<tr>
<td>ITALY</td>
<td>15.8%</td>
<td>386</td>
<td>35.0%</td>
<td>870/1,938</td>
<td>41.3%</td>
<td>1,027/2,289</td>
</tr>
<tr>
<td>LATVIA</td>
<td>15.0%</td>
<td>28</td>
<td>25.0%</td>
<td>48/64.5</td>
<td>29.5%</td>
<td>56.7/76.1</td>
</tr>
<tr>
<td>LITHUANIA</td>
<td>8.3%</td>
<td>36</td>
<td>15.0%</td>
<td>66/108</td>
<td>17.7%</td>
<td>78/127</td>
</tr>
<tr>
<td>LUXEMBOURG</td>
<td>4.5%</td>
<td>1.3</td>
<td>25.0%</td>
<td>7.2/10.5</td>
<td>29.5%</td>
<td>8.5/12.4</td>
</tr>
<tr>
<td>MALTA</td>
<td>0.5%</td>
<td>0.002</td>
<td>2.0%</td>
<td>0.01/0.10</td>
<td>2.4%</td>
<td>0.01/0.12</td>
</tr>
<tr>
<td>NETHERLANDS</td>
<td>3.8%</td>
<td>0</td>
<td>25.0%</td>
<td>76.6/119.6</td>
<td>29.5%</td>
<td>90.4/141.3</td>
</tr>
<tr>
<td>POLAND</td>
<td>3.5%</td>
<td>47</td>
<td>10.0%</td>
<td>140/249</td>
<td>11.8%</td>
<td>166/294</td>
</tr>
<tr>
<td>PORTUGAL</td>
<td>8.1%</td>
<td>25</td>
<td>15.0%</td>
<td>65/85</td>
<td>17.7%</td>
<td>77/100</td>
</tr>
<tr>
<td>ROMANIA</td>
<td>3.2%</td>
<td>42</td>
<td>10.0%</td>
<td>163/362</td>
<td>11.8%</td>
<td>192/428</td>
</tr>
<tr>
<td>SLOVAKIA</td>
<td>10.5%</td>
<td>17</td>
<td>18.0%</td>
<td>31/46</td>
<td>21.2%</td>
<td>36/54</td>
</tr>
<tr>
<td>SLOVENIA</td>
<td>10.2%</td>
<td>10</td>
<td>15.0%</td>
<td>15/19</td>
<td>17.7%</td>
<td>17/23</td>
</tr>
<tr>
<td>SPAIN</td>
<td>10.1%</td>
<td>159</td>
<td>25.0%</td>
<td>410/1,102</td>
<td>29.5%</td>
<td>484/1,302</td>
</tr>
<tr>
<td>SWEDEN</td>
<td>20.3%</td>
<td>75</td>
<td>35.0%</td>
<td>130/279</td>
<td>41.3%</td>
<td>154/330</td>
</tr>
</tbody>
</table>
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS EU-27

#ORGANICINEUROPE

KEY INDICATORS 2019

**PRODUCTION**
- 14,120,629 ha organic agricultural land (9%)
- 340,277 organic producers on average farms of 41.5 ha
- 6,439,751 ha (6.6%)¹
- 1,561,271 ha (14.9%)¹
- 6,050,165 ha (12.4%)¹

**MARKET**
- €38,774 million retail sales
- €87 per capita
- 75,674 organic processors

**CAP SUPPORT (2018)**²
- 8,450,000 ha supported
- 64.3% of certified area at average of 213 €/ha/year
- 1,803 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th></th>
<th>Organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
<td>2018 rates</td>
<td>2018 rates + 25%³ If 100% certified area supported⁴</td>
</tr>
<tr>
<td>2014-2019</td>
<td>9.0%</td>
<td>8.6%</td>
<td>14,121</td>
<td>9,094</td>
</tr>
<tr>
<td>LINEAR TREND⁴</td>
<td>15.0%</td>
<td>6.0%</td>
<td>23,503</td>
<td>15,017</td>
</tr>
<tr>
<td>NATIONAL TARGETS⁵</td>
<td>21.2%</td>
<td>12.3%</td>
<td>33,220</td>
<td>20,962</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>25.0%</td>
<td>16.1%</td>
<td>39,165</td>
<td>24,713</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 64.0% certified area at 213.15 €/ha/year average. Based on these scenarios, a 25% by 2030 target is challenging but achievable, and would require a 3-5 fold increase in expenditure. If achieved, the current national targets would contribute 21.21% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 EU outcome based on current national targets
6 Enhanced national targets needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| Conversion | 0-1,209 | 0-6,000 | 0-2,855 | 0-600 |
| MAINTENANCE | 0-853 | 0-3,800 | 0-2,855 | 0-450 |
| Conversion as % of Maintenance | 100-478% | 100-300% | 100-128% | 100-465% |

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Focus on provision of public goods
- Reduce focus on premium prices as a reward for marketing activities

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Increased by Member States, funded as Pillar 1 eco-schemes and/or Pillar 2 agri-environment-climate measures (AECMs), to deliver 25% target, market and public goods.

EU ORGANIC ACTION PLAN

- 2021-2027
- Target by 2030: 25% share of organic area
- Future plans: Encourage development of Member States' action plans, research to support future policies

OTHER POLICY SUPPORT

| Current context | Action needed |
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Mixed range of eligibilities - combinations may be required, possible, restricted or prohibited | Ensure opportunities for enhanced public good delivery building on synergies with organic management |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Good EU policy framework for investment, procurement and promotion | Encourage Member States' adoption of support options for organic market development, consistent with EU action plan, improve market data availability |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Good framework for advice, training and EIP operational groups with focus on organic in Rural Development Plans, but patchy implementation by Member States | Encourage Member States' adoption of support options for knowledge and innovation, consistent with EU action plan |

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
KEY INDICATORS 2019

**PRODUCTION**
- 669,921 ha organic agricultural land (25.1% of EU agricultural land)
- 26,042 organic producers on average farms of 25.7 ha
- 270,786 ha (20.1%) ¹
- 11,391 ha (17.1%) ¹
- 387,744 ha (30.8%) ¹

**MARKET**
- €1,920 million retail sales
- €215 per capita
- 1,691 organic processors

**CAP SUPPORT (2018)** ²
- 515,000 ha supported
- 80.6% of certified area at average of 234 €/ha/year
- €121 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE ² & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>National organic area share</td>
<td>Average annual growth</td>
<td>Certified supported by the CAP</td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>25.1%</td>
<td>4.3%</td>
<td>670</td>
<td>540</td>
</tr>
<tr>
<td>LINEAR ⁴</td>
<td>35.5%</td>
<td>3.8%</td>
<td>946</td>
<td>763</td>
</tr>
<tr>
<td>POTENTIAL ⁵</td>
<td>40.0%</td>
<td>5.4%</td>
<td>1,068</td>
<td>861</td>
</tr>
<tr>
<td>ENHANCED ⁶</td>
<td>47.2%</td>
<td>8.0%</td>
<td>1,261</td>
<td>1,017</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 81% certified area at 234.36 €/ha/year average. Based on these scenarios, a 40% by 2030 target is realistic and achievable, but would require a doubling of current expenditure if payment rates increased. If achieved, this would contribute 0.68% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher, national organic movement proposes 35% by 2027
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Grassland</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>70-230</td>
<td>450-1000</td>
<td>700</td>
<td>70-255</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>70-230</td>
<td>450-1000</td>
<td>700</td>
<td>70-255</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels
- Keep focus on growing organic sector

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

- Reduced, funded as Pillar 2 agri-environment-climate measures (AECMs)
- Keep focus on growing organic sector

Keep and strengthen organic farming as the key measure in agri-environment-climate measures (AECMs). Support services and practices going beyond by means of combinable AECM measures. Ambitious and comprehensive use of project-based measures to support production and market development.

NATIONAL ORGANIC ACTION PLAN

- 2015-2020
- Target by 2020:
  - >20% of national area
  - Progress towards achieving targets: On target
- New action plan expected after CAP implementation. Need for more ambitious 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVIRONMENT MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with most agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic applications prioritised for some schemes, promotion funding used | Maintain/develop support options to promote organic market development |

| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Organic applications prioritised, well supported | Maintain/develop support options to promote knowledge and innovation |

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
In 2018, conversion/maintenance support was paid on 89.4% certified area at 243 €/ha/year average. Based on these scenarios, a 20% by 2030 target is challenging but achievable, but would 3-4 times the current expenditure. If achieved, this would contribute 0.17% to the EU target of 25% by 2030.
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>390-550</td>
<td>240-400</td>
<td>138-163%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td></td>
<td>550-1050</td>
<td>400-900</td>
<td>117-138%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td></td>
<td>390-1050</td>
<td>240-900</td>
<td>117-163%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td></td>
<td>270-350</td>
<td>120-200</td>
<td>175-225%</td>
<td>Maintain or increase funding levels</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...
Maintained, funded as P1 eco-scheme (maintenance), P2 agri-environment-climate measures (AECMs) (conversion).

REGIONAL ORGANIC ACTION PLANS
- 2013-2020
- In Belgium, its regions, Flanders and Wallonia, have agricultural competences
- Target by 2020:
  - 18% of national area (Walloon, no Flemish targets)
  - Progress towards achieving targets: Behind target
- Separate regional plans in Wallonia and Flanders
  - Wallonia by 2030: 30% of national area and 18.7% share of retail sales value
  - Need for new Flemish action plan

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMBINATION WITH OTHER AGRI-ENVI MEASURES</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND
- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
**KEY INDICATORS 2019**

**PRODUCTION**
- 117,779 ha organic agricultural land (2.6%)
  - 0.08% of EU agricultural land
- 6,213 organic producers on average farms of 19 ha
- 63,940 ha (2.0%)
- 26,486 ha (26.4%)
- 27,339 ha (2.4)

**MARKET**
- €30 million retail sales
  - €4 per capita
- 234 organic processors

**CAP SUPPORT (2018)**
- 68,000 ha supported
  - 53.1% of certified area at average of 354 €/ha/year
  - 24 M€/year expenditure

<table>
<thead>
<tr>
<th>2030 SCENARIOS FOR CAP EXPENDITURE &amp; ORGANIC AREA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>National organic area share</strong></td>
</tr>
<tr>
<td>---------------------------------</td>
</tr>
<tr>
<td><strong>Certified</strong></td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
</tr>
<tr>
<td><strong>LINEAR</strong></td>
</tr>
<tr>
<td><strong>POTENTIAL</strong></td>
</tr>
<tr>
<td><strong>ENHANCED</strong></td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 53.1% certified area at 354 €/ha/year average. Based on these scenarios, a 10% by 2030 target is challenging, and would require 5-10 times the current expenditure based on the current low share of certified area supported. If achieved, this would contribute 0.29% to the EU target of 25% by 2030.

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1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by national organic movement
6. Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

<table>
<thead>
<tr>
<th>CAP SUPPORT PAYMENTS (IN €/HA/YEAR)</th>
<th>ACTIONS NEEDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>Increase % of certified area supported</td>
</tr>
<tr>
<td>282</td>
<td>515-575</td>
</tr>
<tr>
<td>736</td>
<td>128-358</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>Increase % of certified area supported</td>
</tr>
<tr>
<td>166</td>
<td>399-405</td>
</tr>
<tr>
<td>399-557</td>
<td>128-218</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td></td>
</tr>
<tr>
<td>170%</td>
<td>130-140%</td>
</tr>
<tr>
<td>130%</td>
<td>100-164%</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...
Maintained, funded as Pillar 1 eco-scheme (maintenance), Pillar 2 agri-environment-climate measures (AECMs) (conversion).

NATIONAL ORGANIC ACTION PLAN
- 2019-2027: Targets not specified
- No specific future plans. Need for updated action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limited combinations (erosion, rare breeds) possible, some options paid more than organic</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
<tr>
<td>Special provisions for organic projects</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
<tr>
<td>Limited provision, some specific organic programmes</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGEND
- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
In 2018, conversion/maintenance support was paid on 91.5% certified area at 350 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.15% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by national organic movement
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONVERSION</strong></td>
<td>348</td>
<td>577</td>
<td>868</td>
<td>310</td>
</tr>
<tr>
<td><strong>MAINTENANCE</strong></td>
<td>290</td>
<td>481</td>
<td>723</td>
<td>258</td>
</tr>
</tbody>
</table>

**ACTIONS NEEDED**

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

**CONVERSION AS % OF MAINTENANCE**

- 120%
- 120%
- 120%
- 120%

**DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...**

No information.

CAP targets and other details should be made public as soon as possible, and discussions opened with both agriculture and environmental sectors. Organic farming should be supported in the simplest way. Extension services must be able to support the organic sector.

NATIONAL ORGANIC ACTION PLAN

- **2011-2016**
- **Targets by 2016:**
  - 8% of national area
  - 30% of processing
  - Progress towards achieving targets: Behind target
- **No specific future plans. Need for action plan with 2030 targets**

**OTHER POLICY SUPPORT**

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORGANIC APPLICATIONS PRIORITISED (EXTRA POINTS)</strong></td>
<td>Combinations with most agri-environment options possible</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
</tbody>
</table>

**SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION**

| **ORGANIC COVERED AS PART OF FREE ADVISORY SERVICE, ORGANIC TRAINING COMPULSORY FOR SUPPORT APPLICANTS** | Organic applications prioritised (extra points) | Maintain/develop support options to promote organic market development |

**SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH**

| **ORGANIC COVERED AS PART OF FREE ADVISORY SERVICE, ORGANIC TRAINING COMPULSORY FOR SUPPORT APPLICANTS** | Organic applications prioritised (extra points) | Maintain/develop support options to promote knowledge and innovation |

**LEGEND**

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Processing

**PRODUCTION & MARKET DATA**

**FiBL**

Policy data & modelling: Nic Lampkin

**With financial support from**

This publication is co-funded by the LIFE-programme of the European Union under the European Climate, Infrastructure and Environment Executive Agency (CINEA).
### Key Indicators 2019

**Production**
- 6,240 ha organic agricultural land (5.6% of EU agricultural land)
- 1,252 organic producers on average farms of 5 ha
- 3,021 ha (3.6%)
- 3,027 ha (11.5%)
- 172 ha (12.5%)

**Market**
- €1 million retail sales
- 61 organic processors
- 5,000 ha supported
- 76.2% of certified area at average of 805 €/ha/year
- 4 M€/year expenditure

**CAP Support (2018)**
- 5,000 ha supported
- 76.2% of certified area at average of 805 €/ha/year

### 2030 Scenarios for CAP Expenditure & Organic Area

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>5.6%</td>
<td>12.1%</td>
<td>6</td>
<td>4.8</td>
</tr>
<tr>
<td>LINEAR³</td>
<td>10.2%</td>
<td>7.6%</td>
<td>11</td>
<td>8.7</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>10.0%</td>
<td>7.2%</td>
<td>11</td>
<td>8.5</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>11.8%</td>
<td>10.2%</td>
<td>13</td>
<td>10.1</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 76.2% certified area at 805 €/ha/year average. Based on these scenarios, a 10% by 2030 target is achievable, but would require 2-3 times the current expenditure. If achieved, this would contribute 0.01% to the EU target of 25% by 2030.

---

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by independent researcher
6. Enhanced target needed to reach EU 25% target
### Current CAP, National Policy Support & Actions Needed

#### CAP Support Payments (in €/ha/year)

<table>
<thead>
<tr>
<th></th>
<th>Conversion (380)</th>
<th>Maintenance (380)</th>
<th>Conversion vs % of Maintenance (100%)</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONVERSION</strong></td>
<td>600</td>
<td>750-900</td>
<td>450</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td><strong>MAINTENANCE</strong></td>
<td>600</td>
<td>750-900</td>
<td>450</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td><strong>CONVERSION AS % OF MAINTENANCE</strong></td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

**DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...**

No information.

### National Organic Action Plan

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

#### Other Policy Support

<table>
<thead>
<tr>
<th>Other Policy Support</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combination with other Agri-Envi Measures</td>
<td>Situation not reported</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>Support Investments, Market Development &amp; Promotion</td>
<td>Organic applications prioritised for some schemes</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>Support for Advice, Training, Innovation &amp; Research</td>
<td>Obligatory training to join organic support scheme</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

### Legend

- ![Annual crops](image)
- ![Horticulture crops](image)
- ![Permanent crops](image)
- ![Grassland](image)
1 Share of national total for category  
2 CAP support for organic conversion and maintenance, including national co-financing  
3 These values are further explained in the technical note that is available on www.organicseurope.bio  
4 Linear trend growth continuing on 2014-2019 basis  
5 Target proposed by independent researcher, national official target 22% by 2027 and 25% by 2030  
6 Enhanced target needed to reach EU 25% target

In 2018, conversion/maintenance support was paid on 97.3% certified area at 105 €/ha/year average. Based on these scenarios, a 25% by 2030 target could be achievable, but would require a doubling of current expenditure. If achieved, this would contribute 0.55% to the EU target of 25% by 2030.
CZECH REPUBLIC

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Retail sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>79-265</td>
<td>536-669</td>
<td>419-900</td>
<td>84</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>69-180</td>
<td>466-583</td>
<td>417-845</td>
<td>83</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

CONVERSION AS % OF MAINTENANCE

<table>
<thead>
<tr>
<th></th>
<th>115-147%</th>
<th>115%</th>
<th>100-107%</th>
<th>101%</th>
</tr>
</thead>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

- Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs).

Adequate compensation for permanent pastures as organic arable land requires manure produced by animals on pastures. Arable land and vegetable production should be compensated 100%. Focus on investments in organic farmers and their needs, especially young farmers. Make higher ambition of water protection areas part of strategic plan.

NATIONAL ORGANIC ACTION PLAN

- 2016-2020
  - Targets by 2020:
    - 15% of national area
    - 3% of retail sales
    - Progress towards achieving organic land target: On target
    - Progress towards achieving retail sales target: Behind target
  - New action plan 2021-2027 with 23% organic area, 4% retail sales and 5% organic food in public catering by 2027
  - 25% organic area by 2030

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with many agri-environment options possible, also specific requirements</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
<tr>
<td>Organic applications prioritised for some schemes</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
<tr>
<td>No specific support focused on organic farming</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Retail sales

Produced by ORGANICSEUROPE

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@OrganicsEurope

Policy data & modelling: Nic Lampkin

This publication is co-funded by the LIFE-programme of the European Union under the European Climate, Infrastructure and Environment Executive Agency (CINEA).
PROSPECTS & DEVELOPMENTS
FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS
DENMARK

KEY INDICATORS 2019

PRODUCTION
- 285,526 ha organic agricultural land (10.9%) 0.18% of EU agricultural land
- 4,109 organic producers on average farms of 69.5 ha
- 235,178 ha (10.0%) 1
- 3,252 ha (11.7%) 1
- 47,096 ha (20.9%) 1

MARKET
- €1,978 million retail sales
- €344 per capita
- 1,092 organic processors

CAP SUPPORT (2018) 2
- 223,000 ha supported
- 86.8% of certified area at average of 184 €/ha/year
- 41 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE 2 & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified Supported by the CAP 2018 rates 2018 rates + 25% 3 If 100% certified area supported 4</td>
<td></td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.9%</td>
<td>14.4%</td>
<td>286 248</td>
<td>46 57 66</td>
</tr>
<tr>
<td>LINEAR 4</td>
<td>21.5%</td>
<td>8.8%</td>
<td>562 487</td>
<td>90 112 129</td>
</tr>
<tr>
<td>POTENTIAL 5</td>
<td>25.0%</td>
<td>11.7%</td>
<td>654 567</td>
<td>104 130 150</td>
</tr>
<tr>
<td>ENHANCED 6</td>
<td>29.5%</td>
<td>15.5%</td>
<td>772 670</td>
<td>123 154 178</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 86.8% certified area at 184 €/ha/year average. Based on these scenarios, a 25% by 2030 target is achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.42% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target
### CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

#### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>277-344</td>
<td>116-183</td>
<td>190-240%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>277-344</td>
<td>116-183</td>
<td>190-240%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>813-880</td>
<td>652-719</td>
<td>120-125%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>277-344</td>
<td>116-183</td>
<td>190-240%</td>
<td>Maintain or increase funding levels</td>
</tr>
</tbody>
</table>

#### DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Maintained, funded as Pillar 1 eco-scheme (maintenance), Pillar 2 agri-environment-climate measures (AECMs) (conversion).

Application of true-cost-accounting model with payment for public goods rather than a dedicated eco-scheme for organic. Investment in development, research and promotion of organic farming, including 70% public procurement and safeguarding a minimum budget until 2030.

### NATIONAL ORGANIC ACTION PLAN

- 2018-tbc
- No specific production targets. Set new targets for 2030
- Extend current plan as needed

#### OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with many agri-environment options possible, but not grassland/wetland</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>Organic applications prioritised for some schemes, promotion funding used</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>Extensive support available from RDP and national (BOELN) funding</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

#### LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
### KEY INDICATORS 2019

#### PRODUCTION

- **220,737 ha** organic agricultural land (22.2% of EU agricultural land)
- **2,060 organic producers** on average farms of 107.2 ha
- **120,467 ha (17.5%)**
- **2,549 ha (73.5%)**
- **97,721 ha (32.1%)**

#### MARKET

- **€61.8 million** retail sales
- **€46 per capita**
- **173 organic processors**

#### CAP SUPPORT (2018)

- **176,000 ha supported**
- 85.1% of certified area at average of 105 €/ha/year
- **18 M€/year expenditure**

### 2030 SCENARIOS FOR CAP EXPENDITURE & ORGANIC AREA

<table>
<thead>
<tr>
<th></th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
<td>2018 rates</td>
<td>2018 rates + 25%</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td>22.2%</td>
<td>8.4%</td>
<td>221 188</td>
<td>20 25</td>
</tr>
<tr>
<td><strong>LINEAR</strong></td>
<td>37.8%</td>
<td>6.4%</td>
<td>376 320</td>
<td>33 42</td>
</tr>
<tr>
<td><strong>POTENTIAL</strong></td>
<td>30.0%</td>
<td>3.2%</td>
<td>299 254</td>
<td>27 33</td>
</tr>
<tr>
<td><strong>ENHANCED</strong></td>
<td>35.4%</td>
<td>5.4%</td>
<td>352 299</td>
<td>31 39</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 85.1% certified area at 105 €/ha/year average. Based on these scenarios, a 30% by 2030 target is realistic and achievable, but would require up to 2 times current expenditure. If achieved, this would contribute 0.19% to the EU target of 25% by 2030.

---

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target
### Current CAP, National Policy Support & Actions Needed

#### CAP Support Payments (in €/Ha/year)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>MAINTENANCE</th>
<th>Conversion as % of Maintenance</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conversion</strong></td>
<td>137.5</td>
<td>231-660</td>
<td>330</td>
<td>27.5-88</td>
</tr>
<tr>
<td><strong>Maintenance</strong></td>
<td>125</td>
<td>210-600</td>
<td>300</td>
<td>25-80</td>
</tr>
<tr>
<td><strong>Conversion as % of Maintenance</strong></td>
<td>110%</td>
<td>110%</td>
<td>110%</td>
<td>110%</td>
</tr>
</tbody>
</table>

**Actions Needed:**
- Ensure conversion costs fully recognised
- Maintain or increase funding levels

**Draft Plans for CAP 2023-2027 Organic Support to Be...**
- No information.
- Keep focus on growing organic sector

#### Target for organic land should be at least 30%. Increase the payment rates both for conversion and maintenance considering that the present rates are among the lowest in the EU. Prioritize organic farming in investment, cooperation, advice, training, innovation and research measures.

#### National Organic Action Plan
- **2014-2020**
- **Targets by 2020:**
  - 180,000 ha national area
  - 20% regular (weekly) organic food consumers
  - Net value added per labour unit in organic farming €20,500
  - Progress towards achieving targets: Behind target
- **No specific future plans. Need for action plan with 2030 targets**

#### Other Policy Support

<table>
<thead>
<tr>
<th>Combination with other Agri-Envi Measures</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations on same land not possible</td>
<td></td>
<td>Introduce combinations/specifich specific options for organic farms to benefit from synergies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support Investments, Market Development &amp; Promotion</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td></td>
<td>Support organic market development with appropriate schemes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support for Advice, Training, Innovation &amp; Research</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications not prioritised</td>
<td></td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

### Legend
- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Consumption
### Key Indicators 2019

**Production**
- 306,484 ha organic agricultural land (14%)
  - 0.2% of EU agricultural land
- 5,129 organic producers on average farms of 59.8 ha
- 303,882 ha (14.0%)
- 678 ha (18.6%)
- 1,924 ha (7.5%)

**Market**
- €368 million retail sales
  - €66 per capita
- 399 organic processors
- 303,882 ha (14.0%)
- 678 ha (18.6%)
- 1,924 ha (7.5%)

### CAP Support (2018)
- 274,200 ha supported
  - 92.2% of certified area
  - at average of 205 €/ha/year
- 56 M€/year expenditure

### 2030 Scenarios for CAP Expenditure & Organic Area

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified by the CAP</td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>14.0%</td>
<td>8.8%</td>
<td>306</td>
<td>282</td>
</tr>
<tr>
<td>LINEAR</td>
<td>24.1%</td>
<td>6.6%</td>
<td>529</td>
<td>488</td>
</tr>
<tr>
<td>POTENTIAL</td>
<td>25.0%</td>
<td>7.2%</td>
<td>549</td>
<td>506</td>
</tr>
<tr>
<td>ENHANCED</td>
<td>29.5%</td>
<td>10.1%</td>
<td>648</td>
<td>597</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 92.2% certified area at 205 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require over 2 times current expenditure. If achieved, this would contribute 0.35% to the EU target of 25% by 2030.

---

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 National official target 20% by 2027 and 25% by 2030
6 Enhanced target needed to reach EU 25% target
## CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>#</th>
<th>#</th>
<th>-</th>
<th>160-294</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONVERSION</strong></td>
<td>160</td>
<td>600</td>
<td>-</td>
<td>160-294</td>
</tr>
<tr>
<td><strong>MAINTENANCE</strong></td>
<td>160</td>
<td>600</td>
<td>-</td>
<td>160-294</td>
</tr>
<tr>
<td><strong>CONVERSION AS % OF MAINTENANCE</strong></td>
<td>100%</td>
<td>100%</td>
<td>-</td>
<td>100%</td>
</tr>
</tbody>
</table>

### ACTIONS NEEDED
- Ensure conversion costs fully recognised
- Maintain or increase funding levels

### DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...
- Funded as Pillar 2 agri-environment-climate measures (AECMs) (maintenance), no support for conversion.

Strategic plan should add an adequate level of support for conversion to organic farming. Production-specific targets and support system for the organic animal production. Mandatory targets for organic food in public catering.

### NATIONAL ORGANIC ACTION PLAN
- **2013-2020**
- **Targets by 2030:**
  - 25% of national area
  - 25% share of public catering
  - 100% increase in exports
  - Progress towards achieving targets: Behind target

### OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with many agri-environment options possible, some double-funding restrictions</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications prioritised for some schemes</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some organic specific programmes available</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

### LEGEND
- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Public catering
### Key Indicators 2019

**Production**
- 2,240,797 ha organic agricultural land (8.1% of EU agricultural land)
- 47,196 organic producers on average farms of 47.5 ha
- 1,255,369 ha (6.9%)^1
- 167,041 ha (17.5%)^1
- 818,387 ha (9.5%)^1

**Market**
- €11,295 million retail sales
- €173 per capita
- 19,311 organic processors

**CAP Support (2018)**
- 1,040,370 ha supported
- 51.1% of certified area at average of 173 €/ha/year
- 180 M€/year expenditure

### 2030 Scenarios for CAP Expenditure^2 & Organic Area

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>8.1%</td>
<td>20.1%</td>
<td>2,241</td>
<td>1,146</td>
</tr>
<tr>
<td>Linear^4</td>
<td>17.0%</td>
<td>10.1%</td>
<td>4,735</td>
<td>2,421</td>
</tr>
<tr>
<td>Potential^5</td>
<td>25.0%</td>
<td>19.1%</td>
<td>6,954</td>
<td>3,555</td>
</tr>
<tr>
<td>Enhanced^6</td>
<td>29.5%</td>
<td>24.2%</td>
<td>8,212</td>
<td>4,198</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 51.1% certified area at 173 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 3.5-7.5 times current expenditure. If achieved, this would contribute 4.44% to the EU target of 25% by 2030.

---

^1 Share of national total for category
^2 CAP support for organic conversion and maintenance, including national co-financing
^3 These values are further explained in the technical note that is available on www.organicseurope.bio
^4 Linear trend growth continuing on 2014-2019 basis
^5 Target proposed by national organic movement, national official target 18% by 2027
^6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Public procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>300</td>
<td>350-900</td>
<td>350-900</td>
<td>130</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Maintain or increase funding levels
- Restart to support provision of public goods
- Review payment limits per holding
- Review to prevent decline in organic sector

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

- Greatly reduced, funded as Pillar 1 eco-schemes. Some support provided by water agencies.

Support environmental benefits of organic farming within eco-schemes. Ensure that eco-schemes payment is proportionate to the environmental benefits, thus greater payment level for organic farming. Align the French objective with the EU target of 25% organic land by 2030.

NATIONAL ORGANIC ACTION PLAN

- 2017-2022
- Targets by 2022:
  - 15% of national area
  - 22% of public procurement
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with many agri-environment options possible, some double-funding restrictions</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications prioritised for some schemes</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic knowledge centres in some regions, training and research funded</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Public procurement

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info@organicseurope.bio
www.organicseurope.bio
@OrganicsEurope

Support environmental benefits of organic farming within eco-schemes. Ensure that eco-schemes payment is proportionate to the environmental benefits, thus greater payment level for organic farming. Align the French objective with the EU target of 25% organic land by 2030.

ACTIONS NEEDED

- Maintain or increase funding levels
- Restart to support provision of public goods
- Review payment limits per holding
- Review to prevent decline in organic sector

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

- Greatly reduced, funded as Pillar 1 eco-schemes. Some support provided by water agencies.

Support environmental benefits of organic farming within eco-schemes. Ensure that eco-schemes payment is proportionate to the environmental benefits, thus greater payment level for organic farming. Align the French objective with the EU target of 25% organic land by 2030.
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS
GERMANY

KEY INDICATORS 2019

PRODUCTION

- 1,613,785 ha organic agricultural land (9.7%)
- 1.63% of EU agricultural land
- 34,136 organic producers on average farms of 47.3 ha
- 699,951 ha (5.9%)
- 23,031 ha (11.4%)
- 830,000 ha (17.7%)

MARKET

- €11,970 million retail sales
- €144 per capita
- 16,162 organic processors

CAP SUPPORT (2018)

- 1,150,000 ha supported
- 80.6% of certified area at average of 261 €/ha/year
- €300 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE & ORGANIC AREA

<table>
<thead>
<tr>
<th>Year</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha) Certified</th>
<th>Supported by the CAP</th>
<th>CAP expenditure (M€/year) 2018 rates</th>
<th>2018 rates + 25%</th>
<th>If 100% certified area supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-2019</td>
<td>9.7%</td>
<td>10.8%</td>
<td>1,614</td>
<td>1,301</td>
<td>340</td>
<td>425</td>
<td>527</td>
</tr>
<tr>
<td>LINEAR 4</td>
<td>17.7%</td>
<td>7.6%</td>
<td>2,955</td>
<td>2,383</td>
<td>622</td>
<td>778</td>
<td>964</td>
</tr>
<tr>
<td>POTENTIAL 5</td>
<td>20.0%</td>
<td>9.7%</td>
<td>3,343</td>
<td>2,696</td>
<td>704</td>
<td>880</td>
<td>1,091</td>
</tr>
<tr>
<td>ENHANCED 6</td>
<td>23.6%</td>
<td>13.1%</td>
<td>3,948</td>
<td>3,183</td>
<td>831</td>
<td>1,039</td>
<td>1,288</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 80.6% certified area at 261 €/ha/year average. Based on these scenarios, a 20% by 2030 target is realistic and achievable, but would require 2-3 times current expenditure. If achieved, this would contribute 2.13% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target set by national government
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current context</td>
<td>209-520</td>
<td>189-273</td>
<td>110-190%</td>
</tr>
<tr>
<td>Action needed</td>
<td>415-6000</td>
<td>300-3800</td>
<td>140-160%</td>
</tr>
<tr>
<td></td>
<td>655-2855</td>
<td>665-2855</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>190-364</td>
<td>189-273</td>
<td>100-133%</td>
</tr>
<tr>
<td></td>
<td>Maintain or increase funding levels</td>
<td>Maintain or increase funding levels</td>
<td></td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs). Focus support on public goods provided.

NATIONAL ORGANIC ACTION PLAN

- 2017-2023
- Target by 2030:
  - 20% of national area
  - Progress towards achieving targets: Behind target
  - Extend current plan as needed. Need for upgraded 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Combination with other agri-envi measures</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with many agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support investments, market development &amp; promotion</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications prioritised for some schemes, promotion funding used</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support for advice, training, innovation &amp; research</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive support avaiable from RDP and national (BOELN) funding</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGAL

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production

Produced by ORGANICS EUROPE

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@OrganicsEurope

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Production & market data

With financial support from the LIFE-programme of the European Union under the European Climate, Infrastructure and Environment Executive Agency (CINEA).
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

GREECE #ORGANICINEUROPE

KEY INDICATORS 2019

**PRODUCTION**
- 528,752 ha organic agricultural land (11.6%)
- 30,124 organic producers on average farms of 17.6 ha
- 179,003 ha (10.2%)^1
- 70,200 ha (7.6%)^1
- 279,549 ha (15%)^1

**MARKET**
- €66 million retail sales (0%)
- 1,642 organic processors
- 248,000 ha supported (50.4%) of certified area at average of 390 €/ha/year

**CAP SUPPORT (2018)**^2
- 97 M€/year expenditure
- 248,000 ha supported

2030 SCENARIOS FOR CAP EXPENDITURE^2 & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha) Certified</th>
<th>Organic area (kha) Supported by the CAP</th>
<th>CAP expenditure (M€/year) 2018 rates</th>
<th>2018 rates + 25%</th>
<th>If 100% certified area supported</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2014-2019</strong></td>
<td>11.6%</td>
<td>9.1%</td>
<td>529</td>
<td>267</td>
<td>104</td>
<td>130</td>
<td>258</td>
</tr>
<tr>
<td><strong>LINEAR</strong>^4</td>
<td>19.1%</td>
<td>5.9%</td>
<td>869</td>
<td>438</td>
<td>171</td>
<td>214</td>
<td>424</td>
</tr>
<tr>
<td><strong>POTENTIAL</strong>^5</td>
<td>20.0%</td>
<td>6.6%</td>
<td>911</td>
<td>459</td>
<td>179</td>
<td>224</td>
<td>444</td>
</tr>
<tr>
<td><strong>ENHANCED</strong>^6</td>
<td>23.6%</td>
<td>9.4%</td>
<td>1,076</td>
<td>542</td>
<td>212</td>
<td>265</td>
<td>525</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 50.4% certified area at 390 €/ha/year average. Based on these scenarios, a 20% by 2030 target is realistic and achievable, but would require 2-4.5 times current expenditure. If achieved, this would contribute 0.58% to the EU target of 25% by 2030.

---

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>72-550</td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>70-594</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>100%</td>
<td>Increase % of certified area supported</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Limited</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synerges</td>
</tr>
<tr>
<td></td>
<td>opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>for combinations</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Organic applications prioritised (extra points)</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Limited availability of relevant programmes</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
### 2030 Scenarios for CAP Expenditure & Organic Area

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National Organic Area Share</th>
<th>Average Annual Growth</th>
<th>Organic Area (kha)</th>
<th>CAP Expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>6.5%</td>
<td>28.6%</td>
<td>303</td>
<td>167</td>
</tr>
<tr>
<td>Linear</td>
<td>13.6%</td>
<td>9.9%</td>
<td>633</td>
<td>349</td>
</tr>
<tr>
<td>Potential</td>
<td>15.0%</td>
<td>11.9%</td>
<td>701</td>
<td>386</td>
</tr>
<tr>
<td>Enhanced</td>
<td>17.7%</td>
<td>15.7%</td>
<td>827</td>
<td>456</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 55.2% certified area at 186 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require 3-5 times current expenditure. If achieved, this would contribute 0.45% to the EU target of 25% by 2030.

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by national organic movement
6. Enhanced target needed to reach EU 25% target

---

**Key Indicators 2019**

**Production**
- 303,190 ha (6.5%) organic agricultural land, 0.19% of EU agricultural land
- 5,136 organic producers on average farms of 59.0 ha
- 103,887 ha (2.7%)
- 14,520 ha (9.7%)
- 184,783 ha (26.8%)  

**Market**
- €30 million retail sales
- €3 per capita
- 523 organic processors

**CAP Support (2018)**
- 115,000 ha supported
- 55.2% of certified area at average of 186 €/ha/year
- 21 M€/year expenditure
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Social catering</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>242</td>
<td>516</td>
<td>734-1,040</td>
<td>84-147</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>172</td>
<td>516</td>
<td>568-802</td>
<td>84-147</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>141%</td>
<td>100%</td>
<td>130%</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels
- Increase % of certified area supported

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

National strategic plan should include a real commitment to achieve significant growth with an overall vision how to make it viable and serving the society as a whole. A structural change is essential both in vision and in practical terms. The area of non-utilized organic grassland should not be increased more, rather valuable, productive cultures. A society-wide transformation is necessary supported by clear, scientifically valid and value-based communication and harmonized legal framework.

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Targets by 2020:
  - 350,000 ha of national area
  - 30% of social catering
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Combinations on same land not possible</td>
<td>Introduce combinations/specific options for organic farms to benefit from synergies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications prioritised (extra points)</td>
</tr>
<tr>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
</tr>
<tr>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Social catering
## PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

### IRELAND

#### KEY INDICATORS 2019

##### PRODUCTION

- 73,952 ha organic agricultural land (1.5% of EU agricultural land)
- 1,725 organic producers on average farms of 42.9 ha
- 4,319 ha (0.9%) 
- 64 ha (3.8%) 
- 69,323 ha (1.6%) 

##### MARKET

- €206 million retail sales
- €43 per capita
- 26 organic processors

##### CAP SUPPORT (2018)²

- 72,000 ha supported
- 97.3% of certified area at average of 111 €/ha/year
- 8 M€/year expenditure

## 2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>1.5%</td>
<td>8.5%</td>
<td>74</td>
<td>72</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>2.3%</td>
<td>4.9%</td>
<td>114</td>
<td>111</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>12.0%</td>
<td>63.0%</td>
<td>586</td>
<td>570</td>
</tr>
<tr>
<td>ENHANCED⁷</td>
<td>14.2%</td>
<td>76.0%</td>
<td>692</td>
<td>673</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 97.3% certified area at 111 €/ha/year average. Based on these scenarios, a 12% by 2030 target is challenging, and would require 10 times current expenditure. If achieved, this would contribute 0.37% to the EU target of 25% by 2030.

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by national organic movement, national official target 7.5% by 2027
6. Current payment rates are almost 50% below EU average. CAP expenditure based on EU average
7. Enhanced target needed to reach EU 25% target
## CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Organic market</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>60-260</td>
<td>60-300</td>
<td>60-300</td>
<td>60-220</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>30-170</td>
<td>30-200</td>
<td>30-200</td>
<td>30-170</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>150-200%</td>
<td>150-200%</td>
<td>150-200%</td>
<td>130-200%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Increase funding levels to reflect the full costs of organic production
- Budget aligned to national area target

### DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Proposed to maintain and enhance organic farming support under Pillar 2, but no budget allocated to date.

Organic farms should have priority access to agri-environment and eco-schemes to support environmental and climate objectives that go beyond the scope of the organic regulations. CAP funds should be adequately deployed to support organic specific advice and training, infrastructural investments and market development and promotion.

### NATIONAL ORGANIC ACTION PLAN

- **2019-2025**
- **Targets by 2025:**
  - Increase of national area
  - Increased organic market
  - Progress towards achieving targets: Behind target
- **No specific future plans. Need for action plan with 2030 targets**

### OTHER POLICY SUPPORT

#### COMBINATION WITH OTHER AGRI-ENVI MEASURES

- Current context: Combinations with many agri-environmental options possible, but some restrictions
- Action needed: Improve/develop combinations/specific options for organic farms to benefit from synergies

#### SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

- Current context: Capital investment scheme and some national funding for processing investment and market development
- Action needed: Maintain/develop support options to promote organic market development

#### SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

- Current context: Limited provision of funded advice and training
- Action needed: Maintain/develop support options to promote knowledge and innovation

### LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Organic market
KEY INDICATORS 2019

### PRODUCTION
- **1,993,225 ha** organic agricultural land (15.8% of EU agricultural land)
- 70,561 organic producers on average farms of 28.2 ha
- 961,692 ha (13.5%)<sup>1</sup>
- 480,459 ha (21.8%)<sup>1</sup>
- 551,074 ha (17.0%)<sup>1</sup>

### MARKET
- **€3,625 million** retail sales ($59 per capita)
- 21,940 organic processors

### CAP SUPPORT (2018)<sup>2</sup>
- 1,098,000 ha supported (56.1% of certified area at average of 352 €/ha/year)
- **€386 M€/year expenditure**

### 2030 SCENARIOS FOR CAP EXPENDITURE<sup>2</sup> & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certified Supported by the CAP</td>
<td>2018 rates</td>
<td>+ 25%&lt;sup&gt;3&lt;/sup&gt;</td>
<td>If 100% certified area supported&lt;sup&gt;4&lt;/sup&gt;</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td>15.8%</td>
<td>8.7%</td>
<td>1,993</td>
<td>1,118</td>
</tr>
<tr>
<td><strong>LINEAR</strong>&lt;sup&gt;4&lt;/sup&gt;</td>
<td>27.8%</td>
<td>6.9%</td>
<td>3,505</td>
<td>1,966</td>
</tr>
<tr>
<td><strong>POTENTIAL</strong>&lt;sup&gt;5&lt;/sup&gt;</td>
<td>35.0%</td>
<td>11.0%</td>
<td>4,409</td>
<td>2,473</td>
</tr>
<tr>
<td><strong>ENHANCED</strong>&lt;sup&gt;6&lt;/sup&gt;</td>
<td>41.3%</td>
<td>14.7%</td>
<td>5,207</td>
<td>2,921</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 56.1% certified area at 352 €/ha/year average. Based on these scenarios, a 35% by 2030 target is achievable, but would require 2.5-5 times current expenditure. If achieved, this would contribute 2.81% to the EU target of 25% by 2030.

---

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by independent researcher, national organic movement proposes > 50%
6. Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Actions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion</td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>Conversion as % of Maintenance</td>
<td>Increase % of certified area supported</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

At least 30% of CAP budget dedicated to climate and environment in both pillars. National strategic plan must clearly indicate objectives for organic growth and tools to achieve them. Encourage creation of organic districts through collective measures and cooperation for environmental objectives.

NATIONAL ORGANIC ACTION PLAN

- 2016-2020
- Targets by 2020:
  - 20% of national area
  - 5M€ retail sales
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Combination with Other Agri-Envi Measures</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Investments, Market Development &amp; Promotion</td>
<td>Well supported with organic prioritised, regional variations</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>Support for Advice, Training, Innovation &amp; Research</td>
<td>Generally well supported with regional variations</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

Annual crops  Horticulture crops  Permanent crops  Grassland  Production  Retail sales

Produced by ORGANICS EUROPE

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Policy data & modelling: Nic Lampkin

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**PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS**

**LATVIA**

#ORGANICINEUROPE

**KEY INDICATORS 2019**

### PRODUCTION

- **289,796 ha** organic agricultural land (0.18% of EU agricultural land)
- **4,178 organic producers** on average farms of 69.4 ha
- **150,567 ha** (11.7%)
- **3,003 ha** (39.8%)
- **136,226 ha** (21.5%)

### MARKET

- **€51 million** retail sales (€6 per capita)
- **51 organic processors**

### CAP SUPPORT (2018)

- 261,000 ha supported (93.1% of certified area at average of 107 €/ha/year)
- **28 M€/year expenditure**

**2030 SCENARIOS FOR CAP EXPENDITURE & ORGANIC AREA**

<table>
<thead>
<tr>
<th>Line</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td>15.0%</td>
<td>8.5%</td>
<td>290</td>
<td>269.7</td>
</tr>
<tr>
<td><strong>LINEAR</strong></td>
<td>25.0%</td>
<td>6.0%</td>
<td>482</td>
<td>448.9</td>
</tr>
<tr>
<td><strong>POTENTIAL</strong></td>
<td>25.0%</td>
<td>6.1%</td>
<td>483</td>
<td>449.3</td>
</tr>
<tr>
<td><strong>ENHANCED</strong></td>
<td>29.5%</td>
<td>8.8%</td>
<td>570</td>
<td>530.6</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 93.1% certified area at 107 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 2 times current expenditure. If achieved, this would contribute 0.31% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Agriculture</th>
<th>Horticulture</th>
<th>Forestry</th>
<th>ACTIONs NEEDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>559</td>
<td>1,000-1,200</td>
<td>900</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>117</td>
<td>399</td>
<td>485</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>478%</td>
<td>250-300%</td>
<td>186%</td>
<td>290-465%</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE: No information.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Combinations with most agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</td>
<td>Special provisions for organic projects</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</td>
<td>Special provisions for organic projects</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
KEY INDICATORS 2019

**PRODUCTION**
- 242,118 ha organic agricultural land (8.3%) - 0.15% of EU agricultural land
- 2,417 organic producers on average farms of 100.2 ha
- 150,816 ha (7.1%) 1
- 5,387 ha (21.1%) 1
- 85,915 ha (11.2%) 1

**MARKET**
- €50 million retail sales
  - €17 per capita
- 124 organic processors

**CAP SUPPORT (2018)**
- 184,000 ha supported
  - 76.8% of certified area at average of 197 €/ha/year
- 36 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE 2 & ORGANIC AREA

<table>
<thead>
<tr>
<th></th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>8.3%</td>
<td>9.5%</td>
<td>242</td>
<td>186</td>
</tr>
<tr>
<td>LINEAR</td>
<td>13.8%</td>
<td>6.1%</td>
<td>404</td>
<td>310</td>
</tr>
<tr>
<td>POTENTIAL</td>
<td>15.0%</td>
<td>7.4%</td>
<td>439</td>
<td>337</td>
</tr>
<tr>
<td>ENHANCED</td>
<td>17.7%</td>
<td>10.4%</td>
<td>518</td>
<td>398</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 76.8% certified area at 197 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require 2-3.5 times current expenditure. If achieved, this would contribute 0.28% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>CONVERSION</th>
<th>MAINTENANCE</th>
<th>CONVERSION AS % OF MAINTENANCE</th>
<th>ACTIONS NEEDED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>238-298</td>
<td>516-534</td>
<td>534</td>
<td>182</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>218-283</td>
<td>487-525</td>
<td>518</td>
<td>176</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>105-109%</td>
<td>102-106%</td>
<td>103%</td>
<td>103%</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Small increase in organic support rates proposed.

Support development of local organic market by setting a strict target of achieving 30% organic food in public catering by 2025 and 70% by 2030. Allocate portion of eco-schemes budget for organic farming conversion. Increase national budget % for organic farming in the CAP.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th></th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMBINATION WITH OTHER AGRI-ENVI MEASURES</td>
<td>Not possible</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</td>
<td>Organic applications prioritised for some schemes</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</td>
<td>Organic mentioned but no specific prioritisation</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LITHUANIA

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This publication is co-funded by the LIFE-programme of the European Union under the European Climate, Infrastructure and Environment Executive Agency (CINEA).

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
In 2018, conversion/maintenance support was paid on 85.4% certified area at 258 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 6-7 times current expenditure. If achieved, this would contribute 0.02% to the EU target of 25% by 2030.
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Public procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>238-298</td>
<td>516-534</td>
<td>534</td>
<td>182</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>218-283</td>
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<td>518</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>105-109%</td>
<td>102-106%</td>
<td>103%</td>
<td>103%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs).

NATIONAL ORGANIC ACTION PLAN

- 2019-2025
- Targets by 2025:
  - 20% of national area
  - 40% of public procurement
  - Progress towards achieving targets: Behind target
- No specific future plans, 100% land area by 2050 target. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with most agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic mentioned but no specific prioritisation

Situation not reported

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Situation not reported

Maintain/develop support options to promote organic market development

Maintain/develop support options to promote knowledge and innovation

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Public procurement
In 2018, conversion/maintenance support was paid on 13.3% certified area at 374 €/ha/year average. Based on these scenarios, a 2% by 2030 target could be achievable, but a higher target still would be desirable. If achieved, this would contribute 0.0% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 Target proposed by independent researcher
4 Linear trend growth continuing on 2014-2019 basis
5 Enhanced target needed to reach EU 25% target
6 These values are further explained in the technical note that is available on www.organicseurope.bio
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>1,209</td>
<td>1,209</td>
<td>1,209</td>
<td>-</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>555</td>
<td>555</td>
<td>555</td>
<td>-</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>218%</td>
<td>218%</td>
<td>218%</td>
<td>-</td>
</tr>
</tbody>
</table>

**ACTIONS NEEDED**
- Increase % of certified area supported

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

**OTHER POLICY SUPPORT**

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMBINATIONS ON SAME LAND NOT POSSIBLE</td>
<td></td>
<td>Introduce combinations/specific options for organic farms to benefit from synergies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>SITUATION NOT REPORTED</td>
<td></td>
<td>Introduce/develop support options to promote organic market development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>SITUATION NOT REPORTED</td>
<td></td>
<td>Introduce/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

**DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...**

No information.
**PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS**

**NETHERLANDS**

### KEY INDICATORS 2019

#### PRODUCTION
- **68,068 ha** organic agricultural land (3.8% of EU agricultural land)
- **1,867 organic producers** on average farms of 36.5 ha
- **27,306 ha** (2.7%)
- **825 ha** (2.2%)
- **39,937 ha** (5.5%)

#### MARKET
- **€1,211 million** retail sales (€71 per capita)
- **1,021 organic processors**

#### CAP SUPPORT (2018)
- **0.00 ha** supported
- **0.0%** of certified area at average of 0 €/ha/year
- **0 M€/year expenditure**

### 2030 SCENARIOS FOR CAP EXPENDITURE & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td></td>
<td></td>
<td>68</td>
<td>0</td>
</tr>
<tr>
<td><strong>LINEAR⁴</strong></td>
<td></td>
<td></td>
<td>111</td>
<td>89</td>
</tr>
<tr>
<td><strong>POTENTIAL⁵</strong></td>
<td></td>
<td></td>
<td>449</td>
<td>359</td>
</tr>
<tr>
<td><strong>ENHANCED⁶</strong></td>
<td></td>
<td></td>
<td>530</td>
<td>424</td>
</tr>
</tbody>
</table>

*In 2018, conversion/maintenance support was paid on 0.0% certified area. An assumption has been made that 80% of certified area could be supported at 213.15 €/ha EU average rate. Based on these scenarios, a 25% by 2030 target is challenging, but could be achievable if support system was reviewed. If achieved, this would contribute 0.29% to the EU target of 25% by 2030.*

---

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note that is available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by national organic movement
6. Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

CONVERSION AS % OF MAINTENANCE

|                      | 0%           | 0%                | 0%              | 0%        |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No specific organic support planned, still aim to be market-only driven, no recognition of public goods.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Combination with other Agri-Envi measures</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>No organic support available, agri-environment-climate measures (AECMs) are the only option available</td>
<td>Introduce combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

| Support investments, market development & promotion | Situation not reported | Maintain/develop support options to promote organic market development |
| Support for advice, training, innovation & research | Situation not reported | Maintain/develop support options to promote knowledge and innovation |

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
### Key Indicators 2019

**Production**
- 507,637 ha (3.5%) organic agricultural land, 0.32% of EU agricultural land
- 18,655 organic producers on average farms of 27.2 ha
- 375,740 ha (3.5%) \(^1\)
- 31,924 ha (8.1%) \(^1\)
- 99,973 ha (3.1%) \(^1\)

**Market**
- €314 million retail sales, €8 per capita
- 636 organic processors

**Cap Support (2018)**
- 342,000 ha supported, 70.5% of certified area at average of 138 €/ha/year
- 47 M€/year expenditure

### 2030 Scenarios for Cap Expenditure \(^2\) & Organic Area

<table>
<thead>
<tr>
<th></th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>Cap expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td>3.5%</td>
<td>-4.6%</td>
<td>508</td>
<td>358</td>
</tr>
<tr>
<td><strong>Linear</strong> (^4)</td>
<td>0.9%</td>
<td>-6.8%</td>
<td>127</td>
<td>89</td>
</tr>
<tr>
<td><strong>Potential</strong> (^5)</td>
<td>10.0%</td>
<td>16.7%</td>
<td>1,441</td>
<td>1,016</td>
</tr>
<tr>
<td><strong>Enhanced</strong> (^6)</td>
<td>11.8%</td>
<td>21.4%</td>
<td>1,701</td>
<td>1,200</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 70.5% certified area at 138 €/ha/year average. Based on these scenarios, a 10% by 2030 target could be achievable, but the current decline needs to be reversed, with 3-5 times the expenditure. If achieved, this would contribute 0.92% to the EU target of 25% by 2030.

---

\(^1\) Share of national total for category  
\(^2\) CAP support for organic conversion and maintenance, including national co-financing  
\(^3\) These values are further explained in the technical note that is available on www.organicseurope.bio  
\(^4\) Linear trend growth continuing on 2014-2019 basis  
\(^5\) Target proposed by independent researcher  
\(^6\) Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>CONVERSION</th>
<th>MAINTENANCE</th>
<th>CONVERSION AS % OF MAINTENANCE</th>
<th>ACTIONS NEEDED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>215-265</td>
<td>153-217</td>
<td>120-140%</td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td></td>
<td>308-362</td>
<td>305-308</td>
<td>100-120%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td></td>
<td>184-438</td>
<td>154-349</td>
<td>120-125%</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>101%</td>
<td></td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Target by 2020:
  - 700 processors
  - Progress towards achieving targets: On target
- New plan for 2021-2027, possibly integrated with CAP Strategic Plan. Need for targets for 2030

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations on same land not possible</td>
<td>Introduce combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGEND

Annual crops 🌾  Horticulture crops 🌺  Permanent crops 🍎  Grassland 🌾  Processors 🌾
KEY INDICATORS 2019

PRODUCTION

- 293,213 ha organic agricultural land (8.1% of EU agricultural land)
- 5,637 organic producers on average farms of 52 ha
- 55,675 ha (5.3%)³
- 61,196 ha (8.7%)³
- 176,342 ha (9.4%)³

MARKET

- 933 organic processors

CAP SUPPORT (2018)²

- 206,000 ha supported
- 96.5% of certified area at an average of 124 €/ha/year
- 25 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
<td>2018 rates</td>
<td>2018 rates + 25%³</td>
</tr>
<tr>
<td>2014-2019</td>
<td>8.1%</td>
<td>7.6%</td>
<td>293</td>
<td>283</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>10.2%</td>
<td>2.4%</td>
<td>370</td>
<td>357</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>15.0%</td>
<td>7.8%</td>
<td>546</td>
<td>527</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>17.7%</td>
<td>10.9%</td>
<td>645</td>
<td>622</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 96.5% certified area at 124 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.35% to the EU target of 25% by 2030.

¹ Share of national total for category
² CAP support for organic conversion and maintenance, including national co-financing
³ These values are further explained in the technical note that is available on www.organicseurope.bio
⁴ Linear trend growth continuing on 2014-2019 basis
⁵ Target proposed by independent researcher, national official target 12% by 2027
⁶ Enhanced target needed to reach EU 25% target
### CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

#### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current context</strong></td>
<td>19-600</td>
<td>16-530</td>
<td>115-120%</td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td></td>
<td>144-600</td>
<td>120-600</td>
<td>100-120%</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td></td>
<td>60-900</td>
<td>50-900</td>
<td>100-120%</td>
<td>Review payment depression for larger areas</td>
</tr>
<tr>
<td></td>
<td>41-204</td>
<td>34-170</td>
<td>120%</td>
<td></td>
</tr>
</tbody>
</table>

#### DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

- No information.

### NATIONAL ORGANIC ACTION PLAN

- **2018-2027**
- **Targets by 2027:**
  - 12% of national area
  - 50% increase in consumption
  - Progress towards achieving targets: Behind target
- **No specific future plans. Need for targets for 2030**

### OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Combination with Other Agri-Envi Measures</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td></td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support Investments, Market Development &amp; Promotion</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td></td>
<td>Introduce/develop support options to promote organic market development</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support for Advice, Training, Innovation &amp; Research</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td></td>
<td>Introduce/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

### LEGEND

- **Annual crops**
- **Horticulture crops**
- **Permanent crops**
- **Grassland**
- **Production**
- **Consumption**
In 2018, conversion/maintenance support was paid on 56.1% certified area at 232 €/ha/year average. Based on these scenarios, a 10% by 2030 target could be achievable, but would require 4-7 times current expenditure. If achieved, this would contribute 0.80% to the EU target of 25% by 2030.
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conversion</strong></td>
<td>293</td>
<td>365-500</td>
<td>530-620</td>
<td>39-143 Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td><strong>Maintenance</strong></td>
<td>218</td>
<td>350-431</td>
<td>442-479</td>
<td>73-129 Maintain or increase funding levels</td>
</tr>
<tr>
<td><strong>Conversion as % of</strong></td>
<td>134%</td>
<td>105-115%</td>
<td>120-130%</td>
<td>110%</td>
</tr>
<tr>
<td><strong>Maintenance</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... No information.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- Regional action plan in North-West Romania
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th></th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Combination with other agri-envi measures</strong></td>
<td>Combinations possible, even compulsory on permanent grassland</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td><strong>Support investments, market development &amp; promotion</strong></td>
<td>Organic projects prioritised</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td><strong>Support for advice, training, innovation &amp; research</strong></td>
<td>Special provisions for organic projects</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

SLOVAKIA

KEY INDICATORS 2019

**PRODUCTION**
- 197,565 ha organic agricultural land (10.5%)
- 802 organic producers on average farms of 246.3 ha
- 68,022 ha (5.1%) ¹
- 1,797 ha (9.8%) ²
- 127,746 ha (24.4%) ²

**MARKET**
- €4 million retail sales
- 85 organic processors
- 68,022 ha (5.1%)

**CAP SUPPORT (2018)²**
- 158,000 ha supported
- 83.6% of certified area at average of 108 €/ha/year
- 17 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.5%</td>
<td>1.9%</td>
<td>198</td>
<td>165</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>12.2%</td>
<td>1.5%</td>
<td>230</td>
<td>192</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>18.0%</td>
<td>6.6%</td>
<td>340</td>
<td>284</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>21.2%</td>
<td>9.4%</td>
<td>401</td>
<td>335</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 83.6% certified area at 108 €/ha/year average. Based on these scenarios, an 18% by 2030 target is challenging and achievable, requiring up to 3 times current expenditure. If achieved, this would contribute 0.22% to the EU target of 25% by 2030.

¹ Share of national total for category
² CAP support for organic conversion and maintenance, including national co-financing
³ These values are further explained in the technical note that is available on www.organicseurope.bio
⁴ Linear trend growth continuing on 2014-2019 basis
⁵ Target proposed by independent researcher, official national target 16% by 2027
⁶ Enhanced target needed to reach EU 25% target
### CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

#### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Winter crops</th>
<th>Organic</th>
<th>Support</th>
<th>Summer crops</th>
<th>Actions needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion</td>
<td>153</td>
<td>290-529</td>
<td>330-671</td>
<td>96</td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td>Maintenance</td>
<td>153</td>
<td>290-529</td>
<td>330-671</td>
<td>96</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>Conversion as % of maintenance</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

#### DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

Organic land target should be higher than the planned 16% by 2027 set by the government. Need to support and develop organic processing and advisory services.

### NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

### OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Category</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combination with other agri-envi measures</td>
<td>Combinations with many agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>Support investments, market development &amp; promotion</td>
<td>Situation not reported</td>
<td>Introduce/develop support options to promote organic market development</td>
</tr>
<tr>
<td>Support for advice, training, innovation &amp; research</td>
<td>Situation not reported</td>
<td>Retrieving data. Wait a few seconds and try to cut or copy again.</td>
</tr>
</tbody>
</table>

### LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

SLOVENIA

#ORGANICINEUROPE

KEY INDICATORS 2019

**PRODUCTION**
- 49,638 ha organic agricultural land (0.03% of EU agricultural land)
- 3,823 organic producers on average farms of 13 ha
- 6,521 ha (3.7%)^1
- 3,089 ha (11.5%)^1
- 40,028 ha (14%)^1

**MARKET**
- €48 million retail sales
- €26 per capita
- 142 organic processors

**CAP SUPPORT (2018)**^2
- 46,000 ha supported
- 95.7% of certified area at average of 210 €/ha/year
- 10 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE^2 & ORGANIC AREA

<table>
<thead>
<tr>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.2%</td>
<td>4.1%</td>
<td>50</td>
</tr>
<tr>
<td>LINEAR^4</td>
<td>14.1%</td>
<td>3.5%</td>
<td>69</td>
</tr>
<tr>
<td>POTENTIAL^5</td>
<td>15.0%</td>
<td>4.3%</td>
<td>73</td>
</tr>
<tr>
<td>ENHANCED^6</td>
<td>17.7%</td>
<td>6.8%</td>
<td>87</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 95.7% certified area at 210 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, requiring up to 2 times current expenditure. If achieved, this would contribute 0.05% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher
6 Enhanced target needed to reach EU 25% target

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3 These values are further explained in the technical note that is available on www.organicseurope.bio

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SLOVENIA

#ORGANICINEUROPE

PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

SLOVENIA

#ORGANICINEUROPE

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IFOM
ORGANICS EUROPE
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Retail sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>312</td>
<td>600-800</td>
<td>291-900</td>
<td>378</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>326</td>
<td>600</td>
<td>189-900</td>
<td>156</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>96%</td>
<td>100-133%</td>
<td>100-155%</td>
<td>242%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

NATIONAL ORGANIC ACTION PLAN

- 2007-2015
- Targets by 2015:
  - 20% of national area
  - 10% of retail sales
  - Progress towards achieving targets: Target missed
- No current action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations with most agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
<tr>
<td>Organic projects prioritised</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
<tr>
<td>Special provisions for organic projects, compulsory training for organic support applicants</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Retail sales

This publication is co-funded by the LIFE-programme of the European Union under the European Climate, Infrastructure and Environment Executive Agency (CINEA).
KEY INDICATORS 2019

**PRODUCTION**
- 2,354,915 ha organic agricultural land (10.1%) of EU agricultural land (1.5%)
- 41,838 organic producers on average farms of 56.3 ha
- 494,213 ha (4.3%)¹
- 606,406 ha (14.6%)¹
- 1,254,296 ha (16.5%)¹

**MARKET**
- €2,133 million retail sales
- €46 per capita
- 5,230 organic processors

**CAP SUPPORT (2018)**²
- 1,045,000 ha supported
- 46.5% of certified area at average of 152€/ha/year
- €159 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified Supported by the CAP</td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.1%</td>
<td>7.5%</td>
<td>2,355</td>
<td>1,095</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>15.7%</td>
<td>5.0%</td>
<td>3,652</td>
<td>1,699</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>25.0%</td>
<td>13.3%</td>
<td>5,807</td>
<td>2,701</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>29.5%</td>
<td>17.4%</td>
<td>6,858</td>
<td>3,190</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 46.5% certified area at 152 €/ha/year average. Based on these scenarios, a 25% by 2030 target is achievable, but would require 3-6 times current expenditure. If achieved, this would contribute 3.71% to the EU target of 25% by 2030.

1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target set by national government, national organic movement proposes 30% by 2030
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
<th>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion</td>
<td>81-894</td>
<td>128-2013</td>
<td>75-934</td>
<td>45-450</td>
</tr>
<tr>
<td>Maintainance</td>
<td>30-853</td>
<td>41-1561</td>
<td>60-900</td>
<td>41-450</td>
</tr>
<tr>
<td></td>
<td>100-120%</td>
<td>100-120%</td>
<td>100-120%</td>
<td>Increase % of certified area supported</td>
</tr>
</tbody>
</table>

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

CAP strategic plan should include a target for 30% organic land, a 10% organic market share and 20% organic public procurement to ensure involving the entire organic value chain.

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- Several regional action plans
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Other Policy Support</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combination with other agri-envi measures</td>
<td>Regional variations, details not reported</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>Support investments, market development &amp; promotion</td>
<td>Regional variations, details not reported</td>
<td>Support organic market development with appropriate schemes</td>
</tr>
<tr>
<td>Support for advice, training, innovation &amp; research</td>
<td>Regional variations, details not reported</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
### Key Indicators 2019

**Production**
- 613,963 ha organic agricultural land (20.3%) of EU agricultural land
- 5,730 organic producers on average farms of 107.1 ha
- 476,981 ha (18.6%) of organic area
- 610 ha (15.4%) of converted area
- 136,372 ha (30.2%) of certified area

**Market**
- €2,143 million retail sales
- €214 per capita
- 1,117 organic processors

**CAP Support (2018)**
- 355,000 ha supported
- 58.3% of certified area at an average of 211 €/ha/year
- €75 M/year expenditure

### 2030 Scenarios for CAP Expenditure & Organic Area

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td><strong>2014-2019</strong></td>
<td>20.3%</td>
<td>4.5%</td>
<td>614</td>
<td>358</td>
</tr>
<tr>
<td>Linear</td>
<td>29.5%</td>
<td>4.1%</td>
<td>892</td>
<td>520</td>
</tr>
<tr>
<td>Potential</td>
<td>35.0%</td>
<td>6.6%</td>
<td>1,057</td>
<td>617</td>
</tr>
<tr>
<td>Enhanced</td>
<td>41.3%</td>
<td>9.4%</td>
<td>1,249</td>
<td>728</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 58.3% certified area at 211 €/ha/year average. Based on these scenarios, a 35% by 2030 target is achievable, but would require 2-4 times current expenditure. If achieved, this would contribute 0.68% to the EU target of 25% by 2030.

1. Share of national total for category
2. CAP support for organic conversion and maintenance, including national co-financing
3. These values are further explained in the technical note available on www.organicseurope.bio
4. Linear trend growth continuing on 2014-2019 basis
5. Target proposed by independent researcher
6. Enhanced target needed to reach EU 25% target
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CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grasslands</th>
<th>Production</th>
<th>Public procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>142</td>
<td>472</td>
<td>708</td>
<td>76-151</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>142</td>
<td>472</td>
<td>708</td>
<td>76-151</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels
- Review restricted eligibility for grassland

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Maintained, levels uncertain, probably as an eco-scheme in Pillar 1 as one support for both conversion and maintenance.

Increase level of support per hectare of organic farming to fully cover maintenance costs. Include grasslands and agroforestry in organic farming support. Make sure support schemes based on animal units take into account lower intensity in organic farming to avoid disadvantage.

NATIONAL ORGANIC ACTION PLAN

- 2018-2030
- Targets by 2030:
  - 30% of national area
  - 60% of public procurement
  - Progress towards achieving targets: Behind target

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations possible on arable land, no organic support for permanent grassland so AECMs the only option</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
<tr>
<td>Rural Development Plan (RDP) support available for organic projects</td>
<td>Maintain/develop support options to promote organic market development</td>
<td></td>
</tr>
<tr>
<td>RDP support available for organic projects, research and knowledge dissemination promoted</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
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</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Public procurement
The organic land area, the retail sales value (total and per capita) and operators number data (producers and processors) for 2019 are from FiBL data sets available on https://statistics.fibl.org/europe.html. These data are consistent in most cases with Eurostat data, with some exceptions (e.g. Germany);

The breakdown by organic land use category (arable land, permanent crops, grassland) is from FiBL: https://statistics.fibl.org/visualisation/crops.html;

The total agricultural land area (UAA) and breakdown by main land use type data for the % share calculations are from Eurostat https://ec.europa.eu/eurostat/data/database, but relate to 2016, the latest year for which data are currently available.

The total support expenditure, share of certified area supported and average support per hectare values for each country and the EU-27 are 2018 data from a not yet published report compiled by the Thünen Institute.¹

The linear trend values are estimated using linear regression analysis of the data for all years from 2014 to 2019, not only the start and end values, to forecast the outcome in 2030.

National organic area share: This is the share of national agricultural area (Utilised Agricultural Area or UAA) farmed under organic principles. Values are actual for 2019 and estimations for 2030, determined as indicated below for each scenario;

Annual average growth rates are calculated on the basis of the start and end values for each period, in the historic case 2014 and 2019, in subsequent scenarios 2019 and 2030. These values assume a constant growth percentage each year, although it is likely that over time these growth rates will diminish as the sectors grow larger.

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THE COLUMNS

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- The linear trend values are estimated using linear regression analysis of the data for all years from 2014 to 2019, not only the start and end values, to forecast the outcome in 2030.
- Organic area (kha):
  - Certified: Initial 2019 data increased as appropriate for each scenario
  - Supported by the CAP: assuming same share of certified area receiving organic conversion and maintenance support as in 2018.¹
- CAP expenditure (million EUR):
  - Total annual expenditure (million EUR, 2018 average rates): Based on 2018 average payment per hectare data from Thünen Institute report,¹ multiplied by area supported. Values include both EU and national co-financing.
  - 2018 rates +25%: Expenditure if 25% increase in payment rates (million EUR): Assumes that the 2018 average payment per hectare are increased by 25%.
  - If 100% certified area supported: Assumes that the 2018 +25% average payment per hectare is applied to all certified area. In some countries unsupported land is permanent grassland where a lower rate of payment might be expected, so these values represent top end of range.
THE FOUR ROWS

- 2014-2019: it is the historic growth based on actual area data up to 2019, with 2019 expenditure estimated based on 2018 values (see Key indicators above).
- Linear trend: assumes that the growth from 2019 to 2030 will keep the same growth rate calculated using linear regression analysis as achieved in 2014-2019.
- Feasible: These scenarios are proposed on the basis of either:
  - Official targets in national action plans or CAP strategic plans,
  - Organic sector preferred targets as communicated by IFOAM Organics Europe’s members,
  - Value suggested by the consultant on basis of current situation and scenario results.
  - The origin of the targets varies from country to country, and it is explained in the footnotes.
- Enhanced: the organic land growth share needed to deliver the 25% EU target are based on pro rata increases to the Feasible growth values.

IN THE TEXT

The percentage points contribution to the EU target refers to the share of EU UAA that would be achieved, so a 1 percentage point contribution to the 25% target is 1% of EU UAA, not 1% of the target.

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

- Conversion & Maintenance: Data on organic conversion and maintenance payment rates for different land use types are for 2019 (reflecting the 2015-2020 rural development programmes) and sourced from the Thünen Institute report. Payment ranges reflect crop type, area and regional variations – full details are available in the report.
- Conversion as % of maintenance: this is the percentage value of conversion payments compared to maintenance payments, directly calculated from the two values above. Given payments are calculated on an income foregone basis, and conversion normally entails additional investment and restructuring costs, as well as lack of access to organic premium prices, conversion payments might be expected to be substantially higher than maintenance payments, at least for the first 2-3 years until full organic status is achieved.
- Plans for CAP 2021-2027 organic support to be...: Information on future CAP plans reflect responses to IFOAM Organic Europe’s survey (April-May 2021) of its national member organisations.

NATIONAL ORGANIC ACTION PLAN

- Data on current national action plans is obtained from the Thünen Institute report. Information on future action plans reflect responses to IFOAM Organics Europe’s 2021 survey of member organisations.

OTHER POLICY SUPPORT

- Assessments of other support policies (Current context and Actions needed) reflect the judgement of the consultant based on the Thünen Institute report.
- Information was integrated and validated by IFOAM Organics Europe’s Council members.

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2 CAP support for organic conversion and maintenance, including national co-financing.
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