### Key Indicators 2019

#### Production
- **93,118 ha** organic agricultural land (6.9% of EU agricultural land)
- **2,394 organic producers on average farms of 38.9 ha**
- **31,789 ha (3.7%)**
- **1,418 ha (6.9%)**
- **58,123 ha (12.1%)**

#### Market
- **€779 million retail sales**
- **€68 per capita**
- **1,585 organic processors**

#### CAP Support (2018)
- **80,000 ha supported**
- **89.4% of certified area at average of 243 €/ha/year**
- **19 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>Certified Supported</td>
<td></td>
<td></td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>6.9%</td>
<td>7.9%</td>
<td>93</td>
<td>83</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>11.5%</td>
<td>6.2%</td>
<td>156</td>
<td>140</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>20.0%</td>
<td>17.4%</td>
<td>271</td>
<td>242</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>23.6%</td>
<td>22.1%</td>
<td>320</td>
<td>286</td>
</tr>
</tbody>
</table>

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.

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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 independent researcher, regional official target of 30% for Wallonia
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>Actions Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>390-550</td>
<td>240-400</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>550-1050</td>
<td>400-900</td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>390-1050</td>
<td>240-900</td>
<td></td>
</tr>
<tr>
<td>270-350</td>
<td>120-200</td>
<td></td>
</tr>
</tbody>
</table>

**CONVERSION AS % OF MAINTENANCE**

<table>
<thead>
<tr>
<th></th>
<th>138-163%</th>
<th>117-138%</th>
<th>117-163%</th>
<th>175-225%</th>
</tr>
</thead>
</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**

**COMBINATION WITH OTHER AGRI-ENVI MEASURES**

Current context: Combinations with many agri-environment options possible

Action needed: Maintain/develop combinations/specific options for organic farms to benefit from synergies

**SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION**

Current context: Organic farming applications prioritised in some regions

Action needed: Maintain/develop support options to promote organic market development

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

Current context: Organic applications prioritised in some regions

Action needed: Maintain/develop support options to promote knowledge and innovation

**LEGEND**

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