KEY INDICATORS 2019

PRODUCTION

- 108,127 ha organic agricultural land (6.9% of EU agricultural land)
- 5,153 organic producers on average farms of 21.0 ha
- 52,586 ha (6.0%)¹
- 14,893 ha (20.7%)¹
- 40,648 ha (6.7%)¹

MARKET

- €99 million retail sales
- €24 per capita
- 395 organic processors

CAP SUPPORT (2018)²

- 94,000 ha supported
- 91.5% of certified area at average of 350 €/ha/year
- 33 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>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>6.9%</td>
<td>23.2%</td>
<td>108</td>
<td>99</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>14.9%</td>
<td>10.5%</td>
<td>233</td>
<td>213</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>15.0%</td>
<td>10.6%</td>
<td>234</td>
<td>214</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>17.7%</td>
<td>14.2%</td>
<td>277</td>
<td>253</td>
</tr>
</tbody>
</table>

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>Conversion</th>
<th>Maintenance</th>
<th>Conversion as % of Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>348</td>
<td>290</td>
<td>120%</td>
</tr>
<tr>
<td>Organic</td>
<td>577</td>
<td>481</td>
<td>120%</td>
</tr>
<tr>
<td>Horticulture</td>
<td>868</td>
<td>723</td>
<td>120%</td>
</tr>
<tr>
<td>Grassland</td>
<td>310</td>
<td>258</td>
<td>120%</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.

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

- COMBINATION WITH OTHER AGRI-ENVI MEASURES: Combinations with most agri-environment options possible
- SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION: Organic applications prioritised (extra points)
- SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH: Organic covered as part of free advisory service, organic training compulsory for support applicants

CURRENT CONTEXT

ACTION NEEDED

- Improve/develop combinations/specific options for organic farms to benefit from synergies
- 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
- Processing

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